Simple Profiles Component Guide
10*g* Release 3 (10.1.3.3.0)

March 2007

ORACLE®

Simple Profiles Component Guide, 10*g* Release 3 (10.1.3.3.0)

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INTRODUCTION

OVERVIEW

This section provides an overview of this documentation. It contains the following topics:

❖ About This Guide (page 1-1)

❖ Audience (page 1-2)

❖ Conventions (page 1-2)

ABOUT THIS GUIDE

This guide describes how to create and manage profiles using the Simple Profiles component. The following chapters are included in this guide:

❖ Chapter 2 (*About Profiles)*: Describes Simple Profile functionality and its interaction with the Content Profile functionality in Content Server.

❖ Chapter 3 (*Creating a New Profile)*: Describes how to create and update a profile.

❖ Chapter 4 (*Managing Profiles)*: Describes how to view, delete, copy, and move profiles.

AUDIENCE

This guide is intended primarily for system administrators, integrators, and other personnel who are responsible for maintaining or customizing Content Server. This guide is also intended for users who wish to create personal profiles.

CONVENTIONS

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 always appears 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.

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ABOUT PROFILES

OVERVIEW

This section describes profile functionality and provides a brief overview of the Simple Profiles component. It covers the following topics:

Concepts

CONTENT PROFILES

Content profiles are used to configure the Check In, Update, Content Information, and Search pages. They limit or re-arrange the information displayed on these pages, thus making it easier for end users to see or enter only information which is directly relevant. Profiles can be considered a type of filter for what information will be displayed.

Administrators can access the Profiles screens in Content Server by selecting **Administration—Admin Applets—Configuration Manager**. Content Profile functionality is fully described in the *Managing Repository Content Guide.*

The Simple Profiles component is based on Content Profile functionality. It provides a web-based interface to Content Profiles that can be used to create and edit basic profiles. It does not contain all of the functionality of Content Profiles, but does contain the most-often used aspects of Content Profiles.

Two types of profiles can be created with the Simple Profiles component: *system profiles* and *personal profiles*.

❖ System profiles are created by system administrators or other advanced users. They can be used by any Content Server users. These provide system-wide functionality and are not tailored to one specific individual.

❖ Personal profiles are those which can be used only by the person who created the profile. They appear on the user's New Check In page and Search page on a menu list, and are marked with an asterisk (*).

SIMPLE PROFILES AND CONTENT PROFILES INTERACTION

Consider the following points when using Simple Profiles:

❖ Simple Profiles use many of the same concepts and functionality as Content Profiles. Trigger fields are used to evaluate a profile for use, and rules are created using a Simple Profile Wizard. While it is not essential to understand all the details of using Content Profiles, some knowledge of profiles will help when using Simple Profiles.

❖ If you design a system profile in Simple Profiles, you can move it to the Content Profiles applet, available from the Admin Applets menus. Once moved, the profile is no longer available from the Simple Profiles component menus. You must update it using the Content Profiles applet.

❖ Profiles designed in Content Profiles cannot be moved to Simple Profiles. What is created in Content Profiles must remain in Content Profiles, be maintained there, and be edited there.

❖ When you create a Simple Profile, it becomes available for use from the Search menu and the Check In menu. It does not appear in the Profiles applet, available from the Configuration Manager applet. Profiles created with Simple Profiles only appear in the Configuration Manager applet after they have been moved to the Content Profiles applet.

❖ If you disable or uninstall the Simple Profiles component, your profiles will then be available for use through the Profiles applet on the Configuration Manager. However,

if you edit or change the profiles using the Profiles applet and then reinstall Simple Profiles, you will not be able to edit the existing profiles using Simple Profiles and they will be overwritten by the Profiles applet.

SIMPLE PROFILES USES

Once installed, Simple Profiles is available to all users who have access to the component, unlike Content Profiles, which is available only to those users with a specific security privilege, typically system administrators.

Content Profiles is a field-based approach to customization. Metadata fields are selected for inclusion or exclusion on forms, and it is the metadata fields that are evaluated by rules when the content profile is being constructed. The profiles are deployed on a system-wide basis, which affects all users.

By contrast, Simple Profiles takes a form-based approach to profile construction. While Content Profile rules are still applied, the Simple Profiles interface hides the details of the rules, enabling advanced users to make choices from a web-based interface. A software Wizard tool steps the user through the process of creating a simple profile, emphasizing the form where the fields will appear. The simple interface provides rapid deployment of simple profiles and lets advanced users modify the simple profiles as needed.

Simple Profiles lets advanced users easily show and hide groups of fields as well as provide descriptive information about the fields that are included. By extending the information provided for the fields, users can customize the forms so that their own private 'tool tips' are available, reminding them of needed actions, valid entries, and other valuable information about a field. In addition, groups can be designated as collapsible, thus hiding large quantities of metadata until it is needed.

For implementation with Records Manager, the Simple Profiles component meets Department of Defense 5015 certification requirements and enables individual users to set their own defaults for a personal profile. Most users do not have the security privileges required to use the Content Profile tool in the Configuration Manager applet, but all users are able to use Simple Profiles, regardless of their security privileges.

DESIGNING PROFILES

There are multiple ways to design a profile:

❖ Using functionality on the Configuration Manager, accessed by selecting
Administration—Admin Applets—Configuration Manager—Profiles. Only users
with administrative security privileges can perform this function. See the *Managing
Repository Content Guide* for details about that process.

❖ Using Simple Profiles functionality accessed through a link provided in an application
such as Records Manager.

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CREATING A NEW PROFILE

OVERVIEW

This section discusses how to set up a new profile using the Simple Profiles component. System profiles are created by a system administrator and can be accessed by any user according to the configuration. This is in contrast to a personal profile, which is created and configured by a user for personal use. Even when a system administrator sets up a personal profile, it is still available for use only by the system administrator, not to others in the enterprise.

This section covers the following topics:

Concepts

Tasks

Interface

ELEMENTS IN A PROFILE

A profile is composed of rules and a *trigger value*, based on a *trigger field*. You select the trigger field to use in the initial step of setting up the profile. The Simple Profiles component provides an interface to the process of setting up the rules that control the trigger.

Trigger Fields

The first step is to determine your trigger field. A trigger field must match the following criteria:

❖ It must be an option list metadata field. The fields that are defined as option list fields are the only fields that appear in the dropdown list for trigger selection.

❖ After a trigger field has been defined for a system profile, it cannot be deleted from the system. (A user can delete a trigger field defined for a personal profile.)

❖ A trigger field can be disabled by a system administrator using the Profiles tab of the Configuration Manager. Click **Select,** then select **none specified** from the Add Profile Screen, then click **OK**.

Caution: If a trigger field is disabled, all profiles are disabled but they remain listed on the Search and New Check In menu. If a trigger field is changed after profiles have been created that use that field, the existing profiles could become invalid.

If a metadata field in a document matches a trigger value for a profile, then that profile is used for the document. You can have an unlimited number of profiles, but only one trigger *value* per profile. For example, if a trigger field is dDocType, Profile 1 can use a trigger value of ADACCT. Profile 2 can use a trigger value of ADSALES.

Rules

A *rule* is a set of metadata fields that determine how metadata fields are displayed on the Check In, Update, Content Information, and Search pages. It also determines if fields are editable, required, hidden, excluded, or read-only. A rule can be evaluated for every profile (global) or can be evaluated for specific profiles.

A *global rule* is one which is always evaluated. It automatically affects the fields displayed on the Check In, Update, Content Information, and Search pages even if it is not included in a profile. Global rules are evaluated first for documents and searches with profiles. Because profile rules are evaluated after global rules, global rules can be

superseded by profile rules. However, system administrators can set the priority for the global rule and increase its precedence.

Important: Global rules on system profiles affect all personal profiles that other users create. The defaults, descriptions, and labels that a system administrator creates in this type of profile will be used on the personal profiles other users create if the rules are made global.

Profile Pages

After determining the trigger value, you can set up the following elements in the profile using the pages available from the profile configuration Wizard:

❖ **Configure fields**: Used to choose the fields to appear on forms and whether those fields are excluded, hidden, uneditable (read-only) or required. See Selecting Fields for Inclusion (page 3-9) for details.

❖ **Set defaults**: Used to set the defaults for the fields on the page. See Setting Defaults (page 3-9) for details.

❖ **Group fields**: Used to determine how the fields are grouped, the headings used, and any other descriptive information about the groups. See Grouping the Fields (page 3-10) for details.

❖ **Set labels**: Used to change the display names for the fields used in the system profile. See Setting Labels (page 3-11) for details.

❖ **Set descriptions**: Used to add a field label tool tip for a field to explain the field usage. See Setting Descriptions (page 3-12) for details.

❖ **Restrict options**: Used to restrict what appears on a form or to determine the order of options in a list, depending on your field choice. See Restricting Options (page 3-12) for details.

❖ **Activation condition**: Used to set the activation condition that changes system profile behavior based on different inputs. See Setting Activation Conditions (page 3-13) for details.

❖ **Limit access**: Used to limit access to a system profile based on a security group. See Limiting Access (page 3-14) for details.

❖ **Sort order for search results**: Used to set the search order and the direction of a search (ascending or descending). See Setting the Search Sort Order (page 3-15) for details.

❖ **Set script**: Used to associate Idoc Script on a profile level or on a field level in the profile. Script is activated whenever the profile is submitted.

You can include as many of these elements as you need in the profile.

Designing a profile consists of several steps. The exact number and order of the steps depends on the elements to be included in the profile. This document describes all the steps. Choose those steps that you need for the profile.

DESIGNING A PROFILE

System profiles are profiles which can be used by all users. These are typically created by system administrators. Personal profiles are profiles which are created by individual users for their own personal use. The following sections describe how to create and configure a profile.

Note: Some tasks are restricted to system administrators.

Tech Tip: When creating a new profile, you can test the effects of the profile and then edit the functionality. To do so choose **Save** at every step in the profile creation process. Exit the Wizard at various points and view the effect of the profile. To return to editing the profile, select the profile from the List Profiles Page (page 3-18) and select **Edit—Update** from the Actions menu on the profile's information page. Use the Wizard Page Menu (page 3-39) to quickly navigate to the profile page you need to edit.

Adding a New Profile

Follow these steps to create a new system or personal profile using Simple Profiles. You can add as many elements to the profile as are needed. The pages that are displayed depend on the elements selected in the Wizard fields.

1. Access the Simple Profile functionality on your system (for example, through the Administration tray or as a link through another program).

2. To create a new profile click **Create Profile** on the Page menu.

   The Create/Edit Profile Page (page 3-19) is displayed.

3. Enter a name for the profile. This name can be a maximum field length of 50 characters and cannot contain special characters (; @ &, and so on).

4. Enter a display name for the profile. This name appears in the New Check In menu list and in the Search menu list.

5. Enter a description for the profile.

6. Choose the trigger value for the profile. When the trigger field matches this trigger value, the profile will be used. Depending on the type of trigger you chose on the Profile Information Page (page 4-6), a dropdown list may be available where you can select a value.

7. **Administrator Only:** If the rules in a system profile should be used globally, select the **Is Global** check box. Global rules are those which are always evaluated, regardless of the criteria selected for the profile.

Important: If you select **Is Global**, this may affect personal profiles. The defaults, descriptions, and labels created in the system profile may affect pages used in creating personal profiles.

8. **Administrator Only:** If this is a global rule, choose a priority number. A low priority number gives a lower precedence. The rule will be executed before other higher priority rules, which means any changes made by higher priority rules may override those made by this rule.

9. If you do not want the trigger field to be pre-populated with the trigger value specified in step 6, leave the **Clear Search Trigger Value** check box checked. Default behavior is to allow the trigger value to be inserted on the Search pages that use the profile. By checking this box, the trigger value is not used.

10. If you want to use activation script for this profile, add that Idoc Script here.

11. Select the elements to include in your profile by clicking the appropriate check box in the Wizard fields list on the bottom of the page.

12. When finished selecting elements to include, click **Save**.

The first Wizard page for the profile is displayed on the Create/Edit Profile Page (page 3-19).

13. Make your configuration choices for each Wizard page. When you have finished specifying the configuration for each page, click **Save**, and the Wizard will continue with the next page in the sequence.

Wizard pages include the following:

❖ Configure Fields Page (page 3-22)

❖ Set Defaults Page (page 3-24)

- ❖ Group Fields Page (page 3-25)
- ❖ Set Labels Page (page 3-27)
- ❖ Set Descriptions Page (page 3-28)
- ❖ Restrict Options Page (page 3-29)
- ❖ Set Activation Conditions Page (page 3-31)
- ❖ Limit Access Page (page 3-33)
- ❖ Set Search Sort Order Page (page 3-34)
- ❖ Set Script Page (page 3-35)

Note: If you do not want to save the configuration for a page, click **Reset** to return the settings to their original values. At any time you can click **Exit Wizard** and the configuration that you have completed is saved in the new profile.

14. When you finish configuring the last page in the profile Wizard sequence, click **Save**.

    The Profile Information Page (page 4-6) is displayed. From this page you can edit, delete, or copy the newly created profile. See Chapter 4 (*Managing Profiles)* for details.

Using the Create/Edit Profile Pages

Which profile pages are available for configuring a new system profile depend on the options selected on the Create/Edit Profile Page (page 3-19). However, you can follow this general procedure to manage the information on any of the pages:

- ❖ Click a field name to designate it for use. If you want to designate a block of fields, click the first field, then press the Shift key and click the final field in the block. You can now manipulate all the fields simultaneously.

- ❖ Click the arrow buttons to move the field from one location to another. A field can only be used in one location at a time.

- ❖ If a field has an additional element, such as a label to be associated with the field or a value that can be selected, that information appears at the bottom of the page.

- ❖ To save the page and move to the next page in the sequence, click **Save**.

- ❖ To exit the process and save the profile at any point, click **Exit Wizard**.

- ❖ To reset the values on the page, click **Reset**.

- ❖ To receive help information for the page, click **Quick Help**.

Actions Menu Options

The Actions Menu (page 3-36) for the individual profiles on the List Profiles Page (page 3-18) is a dropdown list of available options, including the following:

❖ **Update**: Returns to the Create/Edit Profile Page (page 3-19) where you can re-select elements to include in your profile.

❖ **Delete**: Deletes the current profile.

❖ **Copy**: Displays the Copy Profile Page (page 4-9), enabling you to copy the current profile to a new name.

❖ **Move to Configuration Manager**: Prompts you if you want to move the current profile to the Configuration Manager. See Moving a System Content Profile to Configuration Manager (Administrators Only) (page 4-4) for details.

❖ **Configuration options**: Lists the ten pages that can be used to create a profile. You can move back and forth between the pages using the Wizard Page Menu (page 3-39). Even if you did not select a page for use in your profile, you can add a page to the profile by selecting it from this list.

Wizard Page Options

The Wizard Page Menu (page 3-39) is a dropdown list that shows which pages are available for use in the profile. You can move between pages in your profile by selecting a page from this list.

Saving, Resetting, and Exiting the Design Process

❖ To exit the profile design process, click **Exit Wizard** on any design page. A message is displayed, indicating the Wizard has been exited. Click **OK**.

The Profile Information Page (page 4-6) for the profile is displayed. See Viewing Profile Information (page 4-3) for details about using the options available on this page.

Important: If you select **Exit Wizard**, your profile is saved temporarily but does not appear on New Check In or Search menus for use. You must complete the design process in order to use the profile. See Updating a Profile (page 3-16) for details.

❖ To reset the current page and lose all changes made, click **Reset**.

❖ For help topics relating to the page, click **Quick Help**.

❖ When you have finished the configuration on the page, click **Save**. The next page in the profile design sequence is displayed.

Selecting Fields for Inclusion

If you selected **Configure Fields** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Configure Fields Page (page 3-22) is displayed. Use this page to determine actions for the specified fields.

❖ Excluded from the forms: excluded fields are not available for use on any future pages used in the profile design process.

❖ Hidden on the form: hidden fields can continue to be used even though they are not displayed. This allows you to set defaults, descriptions, and other useful information for those fields which will remain on the form when the document is checked in.

❖ Read-only (uneditable): uneditable fields are those which cannot be altered during the check in or update process.

❖ Required: required fields must be filled. If you designate a field as required, you can also include a message when prompted at the bottom of the page.

1. Highlight a field for use and move it into the appropriate usage box on the right side of the page.

2. When done, click **Save**.

   The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting Defaults

If you selected **Set Defaults** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Defaults Page (page 3-24) is displayed. Use this page to set default values for the fields in the profile.

1. Highlight a field for use and move it to the Defaulted Fields usage box.

   A prompt section opens at the bottom of the page where you can enter the default value for the field.

2. Enter a default value.

3. When you have set all the default values, click **Save**.

    The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Grouping the Fields

If you selected **Group Fields** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Group Fields Page (page 3-25) is displayed. Use this page to group items together on the Check In, Update, Search, and Content Information pages.

Note: If you chose to configure fields and excluded some fields on the Configure Fields Page (page 3-22), those fields do not appear for use on the current page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1. Highlight the fields you want to use and move them the appropriate box on the right side of the page. The Default box can be used for information that has pre-defined defaults, or for any fields that should appear at the bottom of the form that uses the profile.

2. To create a new group, click **Add Group**.

    The Group Fields Dialog (page 3-26) page appears.

    a. Enter an ID for the new group. The ID can be a maximum of 50 characters and should not include special characters (#, @, etc.)

    b. Enter a label for the new group. The label appears on the form when the profile is used.

    c. Enter a description for the new group. When the user's cursor is placed on the title on the form, this description appears as a field label tooltip.

    d. Enter any detailed information that identifies the new group.

    e. Select the **Allow Collapse Interaction** checkbox to allow users to collapse the group when viewing the page.

f.   Select the **Is Initially Collapsed** check box to collapse the group on initial use of the page.

To reset any changes you've made, click **Reset**. For additional help information, click **Quick Help**. To exit without saving the group, click the X in the top right corner of the Group Fields Dialog (page 3-26). When done creating the new group, click **Save**.

3.   To edit any group on the page, including the Default group, click the page icon next to the group title.

The Group Fields Dialog (page 3-26) for that group opens and you can edit the information.

4.   To delete a group, click the delete icon in the group title line.

The fields that were selected for inclusion in the group are returned to the Non-Grouped Fields list on the left side of the page.

5.   To rearrange the order of fields in a group, highlight a field then click the up or down arrow to move the field into the appropriate position.

6.   When finished arranging the groups on the page, click **Save**.

The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting Labels

If you selected **Set Label** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Labels Page (page 3-27) is displayed. Use this page to add labels to fields on the Check In, Update, Search, and Content Information pages.

Note: If you chose to configure fields and excluded some fields on the Configure Fields Page (page 3-22), those fields do not appear for use on the current page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1.   Highlight the fields you want to use and move them to the Labeled Fields box on the right side of the page.

The Field Labels section at the bottom of the page opens with a prompt box for each field you selected for use.

2.   Enter the label for the field next to the field name.

3. When done, click **Save**.

   The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting Descriptions

If you selected **Set Descriptions** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Descriptions Page (page 3-28) is displayed. Use this page to add field label tooltips on the Check In, Update, Search, and Content Information pages.

Note: If you chose to configure fields and excluded some fields on the Configure Fields Page (page 3-22), those fields do not appear for use on the current page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1. Highlight the fields you want to use and move them to the Descripted Fields box on the right side of the page.

2. The Field Descriptions section at the bottom of the page opens with a prompt box for each field you selected for use.

3. Enter a description for the field next to the field name. This appears as a field label tooltip when the user places the cursor on the field label.

4. If needed, enter a detailed description. This appears when the user clicks on the label field.

5. When done, click **Save**.

   The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Restricting Options

If you selected **Restrict Options** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Restrict Options Page (page 3-29) is displayed. Use this page to restrict the choices on any option lists used in the profile.

Note: Only fields that have option lists associated with them appear for use on this page.

1. Highlight the fields you want to use and move them the Restricted Fields box on the right side of the page.

2. Highlight the field you want to restrict in the Restricted Fields box and click **Edit Options**.

   The Restricted Options for <field> Dialog (page 3-30) is displayed.

3. Highlight options to use in the Available Options box and move them to the Selected Options box.

4. To change the order of the options, click the up or down arrow keys. This can be used to put most frequently used items at the top of the list.

5. To reset any changes you've made, click **Reset**. For additional help information, click **Quick Help**. To exit without saving the group, click the X in the top right corner of the Restricted Options for <field> Dialog (page 3-30). When done selecting and arranging the options, click **Save**.

6. When done selecting all option lists, click **Save**.

   The next page in the system profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting Activation Conditions

If you selected **Set Activation Conditions** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Activation Conditions Page (page 3-31) is displayed. Use this page to specify the event, action, or state that triggers the rules in the profile.

Important: Not all combination of activation conditions are valid and some may be mutually exclusive. Be careful when using combinations of condition types.

1. Choose activation conditions by selecting the checkbox next to the appropriate activation condition:

    System Event Activations

    *   On request: when a search request is initiated.
    *   On Submit: when a check in is initiated.
    *   On Import: when an archive is imported.

    User Action Activations

    *   Check In New: when checking in new content.
    *   Check In Selected: when checking in selected content.
    *   Info: when accessing content information.
    *   Update: when updating content information.
    *   Search: when searching for content.

    Flag Activation Conditions

    *   Is Workflow: when a document is in a workflow
    *   Is Not Workflow: when a document is scheduled for a workflow but not active in the workflow.

Note: If no workflow check box is selected, the workflow state is ignored as a criteria for activation.

2. Script box: If you want to use activation script in this profile, enter the Idoc Script f here. See the *Managing Repository Content Guide* for details about creating profile scripts.

3. When done, click **Save**.

    The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Limiting Access

If you selected **Limit Access** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Limit Access Page (page 3-33) is displayed. Use this page to specify if access to the system profile should be set according to pre-defined security groups for the Check In and Search pages.

Important: You can limit access based on a security group or an account, if accounts have been enabled on your Content Server. If you limit access to both security groups *and* accounts, a user must belong to **both** groups in order to use the profile.

1. Limit access to the Check In page by selecting the security group from the dropdown menu. Only users in that security group will be able to check in content using this profile.

2. If you have set up accounts, select the account from the dropdown menu for the Check In page. Only users with that account *and* in the security group specified in step 1 will be able to use this profile on the Check In page.

3. Limit access to the Search page by selecting the security group from the dropdown menu. Only users in that security group will be able to search for content using this profile.

4. If you have set up accounts, enter the account name or select the account from the dropdown menu. Only users with that account *and* in the security group specified in step3 will be able to use this profile on the Search page.

5. When done, click **Save**. The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting the Search Sort Order

If you selected **Set Search Sort Order** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Search Sort Order Page (page 3-34) is displayed. Use this page to specify the order of fields used for sorting. Move higher priority fields to the top of the Sorted Fields list.

1. Highlight the fields you want to use and move them the Sorted Fields box on the right side of the page.

2. Determine the order of sorting by moving the up or down arrow keys to assign a field a higher sorting priority.

3. Fields are sorted in descending order by default. To sort the field by ascending order, select the check box at the bottom of the page.

4. When done, click **Save**.

   The next page in the profile creation process is displayed.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Setting Scripts

If you selected **Set Script** from the Wizard Fields section on the Create/Edit Profile Page (page 3-19), the Set Script Page (page 3-35) is displayed. This page is used to specify Idoc Script to be used by a field either before or after a profile is submitted.

See Using the Create/Edit Profile Pages (page 3-7) for details about moving fields into designated areas on this page. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details about saving or resetting the page.

Updating a Profile

Updating a profile involves accessing an existing profile and modifying, adding, or deleting information.

1. Access the List Profiles Page (page 3-18).

2. To update information for a profile, select one of the Action options for configuring a profile or fields. See Actions Menu (page 3-36).

   You also can click the Info icon for the profile to update. From the Page menu on the Profile Information Page (page 4-6) select any of the options for configuring the profile information or fields.

Note: A profile can be updated by using Actions menu options to display the appropriate configuration page. However, if you select **Edit—Update,** the Create/Edit Profile Page (page 3-19) is displayed. When that page is saved it automatically starts the Wizard for modifying the profile configuration. If you do not want to use the Wizard, use the menu options to directly select a field to modify.

Wizard pages include the following:

❖ Configure Fields Page (page 3-22)

❖ Set Defaults Page (page 3-24)

❖ Group Fields Page (page 3-25)

❖ Set Labels Page (page 3-27)

❖ Set Descriptions Page (page 3-28)

❖ Restrict Options Page (page 3-29)

❖ Set Activation Conditions Page (page 3-31)

❖ Limit Access Page (page 3-33)

❖ Set Search Sort Order Page (page 3-34)

❖ Set Script Page (page 3-35)

SIMPLE PROFILES INTERFACE

This section contains the following topics:

List Profiles Page

The Profiles page is used to list the current set of profiles and provide access to menus for creating profiles and configuring metadata sets. Access the Simple Profile functionality on your system through the Administration tray or as a link through another program such as Records Manager.

Feature	Description
Create Profile menu item	Displays Create/Edit Profile Page (page 3-19) for creating a new profile.
Configure Metadata Set	Displays Profiles Configuration Page (Administrators Only) (page 4-10) for specifying the trigger field options for profiles.
Profile Name column	Name of a profile.
Display Label column	Display label for a profile.

Feature	Description
Description column	Description of a profile.
Actions column	The Actions Menu (page 3-36) provides access to most of the functions that are also available on the Page menu for an existing profile. The Info icon displays the Profile Information Page (page 4-6) for a profile.

Create/Edit Profile Page

The Create/Edit Profile page is used to create or edit the initial profile configuration and Wizard fields settings. To access this page for a new profile select **Create Profile** from the Page menu on the List Profiles Page (page 3-18). To access this page for an existing profile select **Edit—Profile** from the Page menu or the Actions menu.

Feature	Description
Profile Name field	Unique profile name.
Display Label field	Unique profile display label.
Description field	Profile description.
Trigger field	Trigger value for the profile.
Is Global checkbox	If checked, rules in this profile should be used globally. Global rules are those which are always evaluated, regardless of the criteria selected for the profile. Default is FALSE.
Priority field	Number that specifies the priority of field priority. The default is 10.
Clear Search Trigger Value checkbox	Clears the search trigger value. The default is TRUE.
Activation Script field	Associates specified Idoc Script on a profile level or on a field level in the profile. Activated when the profile is submitted.
Wizard Fields (The following list summarizes the most commonly available options)	
Configure Fields checkbox	Configure the field types. The default is TRUE.
Set Defaults checkbox	Set defaults. The default is TRUE.
Group Fields checkbox	Configure group fields. The default is TRUE.
Set Labels checkbox	Set labels. The default is TRUE.
Set Descriptions checkbox	Set descriptions. The default is TRUE.
Restrict Options checkbox	Specify options to be restricted. The default is TRUE.
Set Activation Conditions checkbox	Set activation conditions for the profile. The default is TRUE.

Feature	Description
Limit Access checkbox	Specify access limits for the profile. The default is TRUE.
Set Search Sort Order checkbox	Specify a search sort order. The default is TRUE.
Set Script checkbox	Associate specified Idoc Script so it is activated before the profile is submitted or after the script is submitted. The default is TRUE.
Save button	Required to start the profile configuration Wizard. Saves changes to the profile configuration and displays the Create/Edit Profile Page (page 3-19) with the Configure Fields Page (page 3-22).

Configure Fields Page
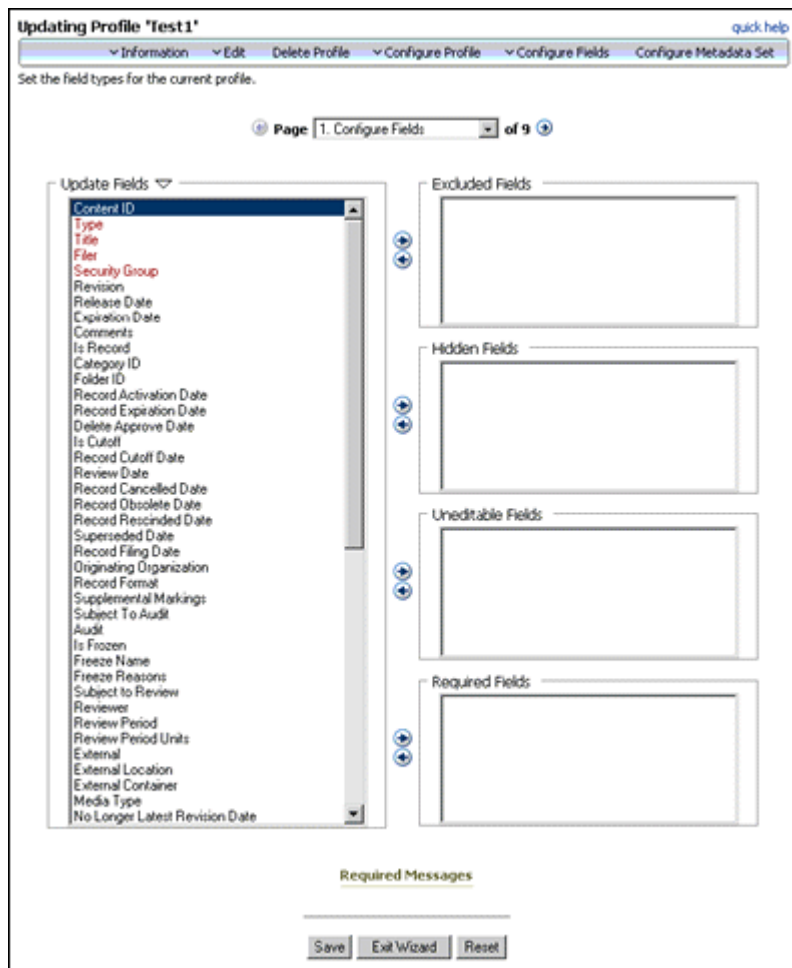
The Configure Fields page is used to configure the field types for the profile. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Field Configurations** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.

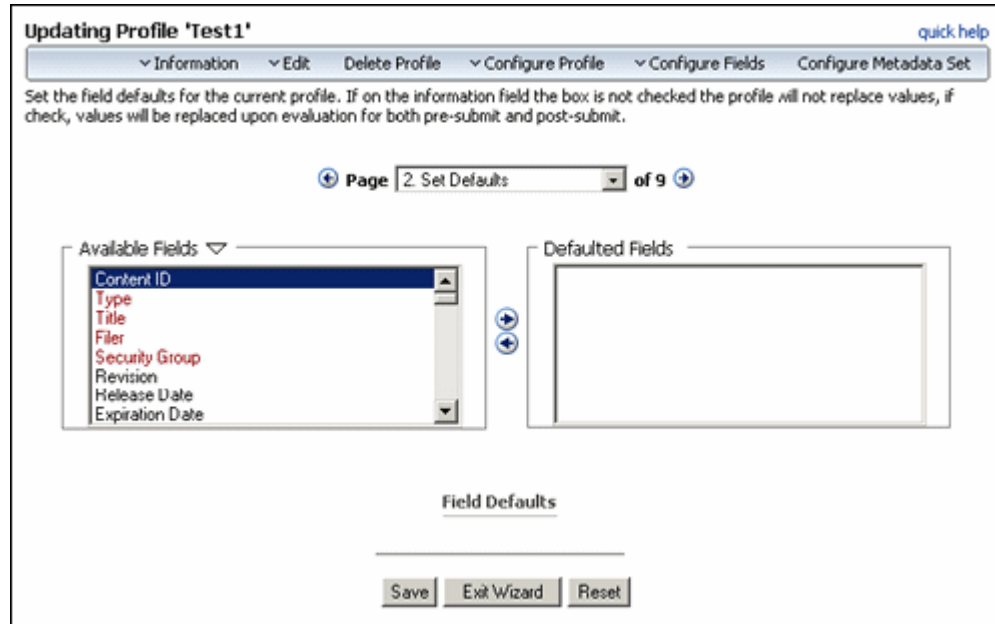| Feature	Description
Update Fields box	Lists all the available fields to be configured for the profile.
Excluded Fields box	To exclude a field from the profile, select the field name from the Update Fields box and click the arrow to move it into this box. You can use the arrow to move the field name back into the Update Fields box.
Hidden Fields box	To hide a field from the profile, select the field name from the Update Fields box and click the arrow to move it into this box. You can use the arrow to move the field name back into the Update Fields box.
Uneditable Fields box	To make a field uneditable in the profile, select the field name from the Update Fields box and click the arrow to move it into this box. You can use the arrow to move the field name back into the Update Fields box.
Required Fields box	To make a field required in the profile, select the field name from the Update Fields box and click the arrow to move it into this box. You can use the arrow to move the field name back into the Update Fields box. When a field is made required, it is displayed in the Required Messages list.
Required Messages list	When a field is configured to be required, the field name is listed here with a field containing a description of the requirement. The description can be edited.

Set Defaults Page

The Set Defaults page is used to configure field defaults for the current profile. To access this page select it throgh the profile configuration Wizard, or select **Configure Fields— Labels** from the Page menu or Actions menu.

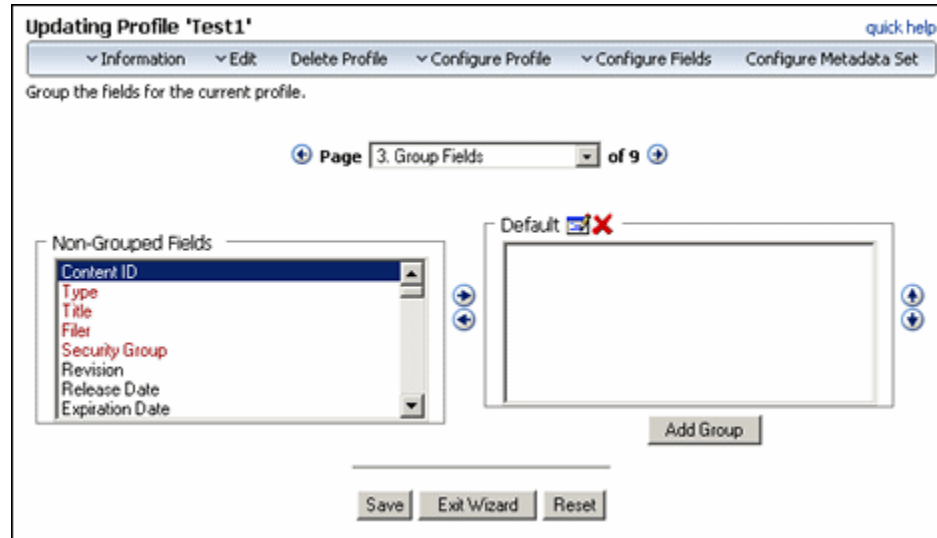| Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields box	Fields available to be configured.
Defaulted Fields box	Default fields.
Field Defaults list	If any fields are selected to be defaulted fields, they are listed here. If the checkbox for a field is empty, the profile with not replace values for the field. If the checkbox is selected, field values will be replaced upon evaluation for both pre-submit and post-submit processing.

Group Fields Page

The Group Fields page is used to configure group fields for the current profile. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Groups** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Non-Grouped Fields list	Lists available fields.
Default field	Lists fields to be placed in groups. Use the horizontal arrows to move fields to this list from the Non-Grouped Fields list. Use the vertical arrows to order the fields in the group. Click the Group icon ⊞ to display a Group Fields Dialog (page 3-26) in which to enter group information. Click the red X icon '✖ by a Group field to delete the group.

Feature	Description
Add Group button	Displays a New Group field in which to add fields to form a new group. The Group Fields Dialog (page 3-26) is displayed automatically.

Group Fields Dialog

The Group Fields dialog is used to specify the fields associated with the current group in the profile being created or updated. To access this dialog, first use the Create/Edit Profile Page (page 3-19) to access the Group Fields Page (page 3-25), then click **Add Group** or click the Default group icon. T

Feature	Description
ID field	Required. If you use the Add Group button to open this dialog, an ID is provided automatically. This field can be modified.
Label field	Required. If you use the Add Group button to open this dialog, a label is provided automatically. This field can be modified.
Description field	Description of the group.

Feature	Description
Detail field	A detailed description, which is displayed in a tooltip.
Allow Collapse Interaction checkbox	Enables users to manage the collapse behavior of a group (expand or collapse).
Is Initially Collapsed	On pages, the groups are initially collapsed and not fully displayed for the user.

Set Labels Page
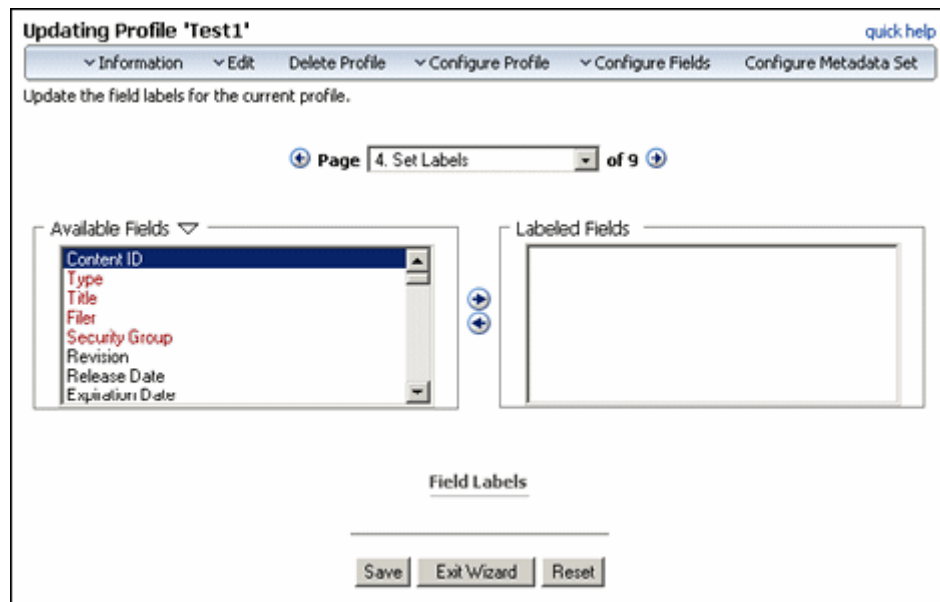
The Set Labels page is used to configure field labels for the current profile. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Labels** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields list	List of available fields.
Labeled Fields list	List of fields to be given different labels.
Fields Labels fields	Each field move to the Labeled Fields list is also displayed in this list with the original field label and a field for the new field label.

Set Descriptions Page

The Set Descriptions page is used to configure field descriptions for the current profile. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Descriptions** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields list	List of available fields.
Described Fields list	List of fields to be given descriptions.
Fields Descriptions fields	Each field move to the Described Fields list is also displayed in this list with the original field label, a field for a brief description, and a field for a more detailed description.

Restrict Options Page
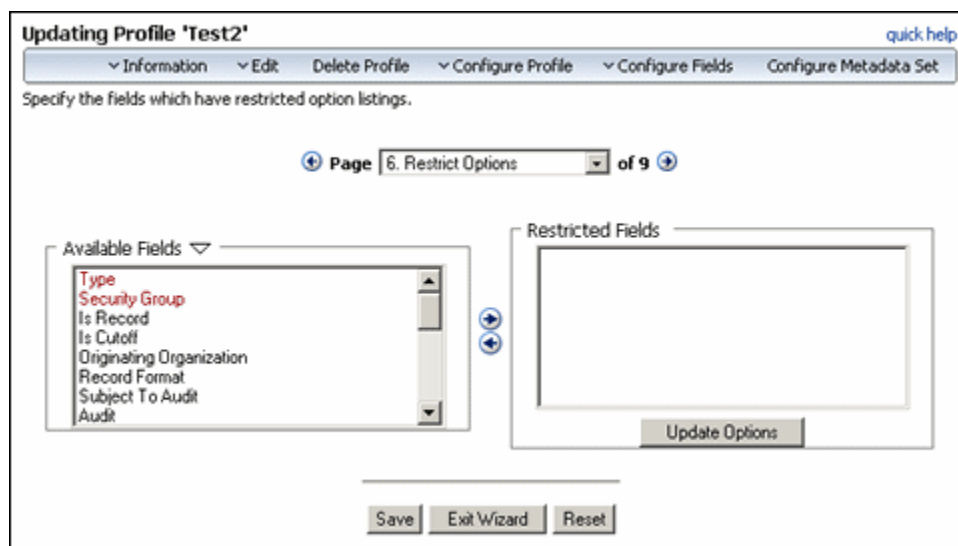
The Restrict Options page is used to configure fields that have restricted option listings for the current profile. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Restrictions Options** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields list	List of available fields.
Restricted Fields list	List of fields that have restricted option listings.
Update Options button	Displays the Restricted Options for <field> Dialog (page 3-30). Use this dialog to specify which available options are allowed and in which order.

Restricted Options for <field> Dialog
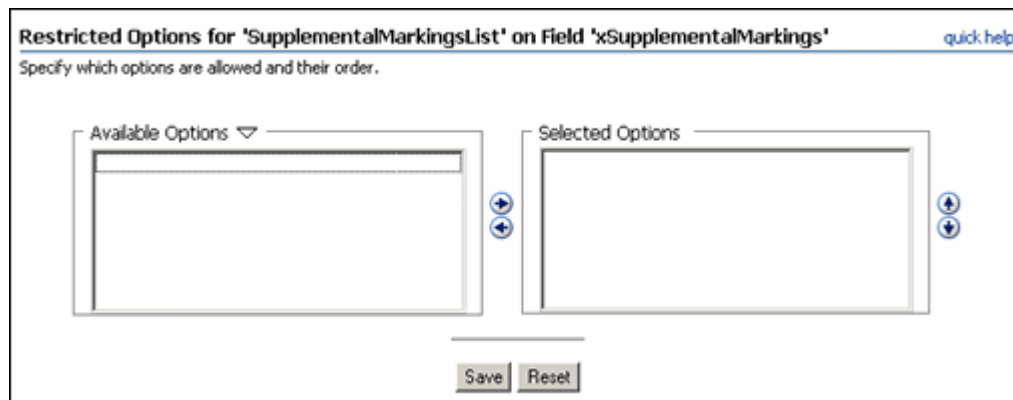
The Restricted Options dialog is used to specify which available options are allowed and in which order. To access this dialog click the Update Options button on the Restrict Options Page (page 3-29).

Feature	Description
Available Options list	List of available options for the field.
Selected Options list	List of options allowed in the restricted field.

Set Activation Conditions Page

The Set Activation Conditions page is used to specify when the profile is activated based on the defined conditions. To access this page select it through the profile configuration Wizard, or select **Configure Profile—Activation Conditions** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Event Activation Conditions	
On Request checkbox	Profile activated when request event occurs.

Feature	Description
On Submit checkbox	Profile activated when submit event occurs.
On Import checkbox	Profile activated when import event occurs.
Action Activation Conditions	
Check In New checkbox	Profile activated when Check In New content action occurs.
Check In Selected checkbox	Profile activated when Check In Selected content action occurs.
Info checkbox	Profile activated when Info content action occurs.
Update checkbox	Profile activated when Update content action occurs.
Search checkbox	Profile activated when Search content action occurs.
Flag Activation Conditions	
Is Workflow checkbox	Profile activated when Is Workflow flag is tripped.
Is Not Workflow checkbox	Profile activated when Is Not Workflow flag is tripped.

Limit Access Page

The Limit Access page is used to restrict the personalization links for the current profile.To access this page select it through the profile configuration Wizard, or select **Configure Profile—Limit Access** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Check In	
Security Group field	The profile's Check In link is restricted to the specified security group.
Account field	The profile's Check In link is restricted to the specified account.

Feature	Description
Search	
Security Group field	The profile's Search link is restricted to the specified security group.
Account field	The profile's Search link is restricted to the specified account.

Set Search Sort Order Page
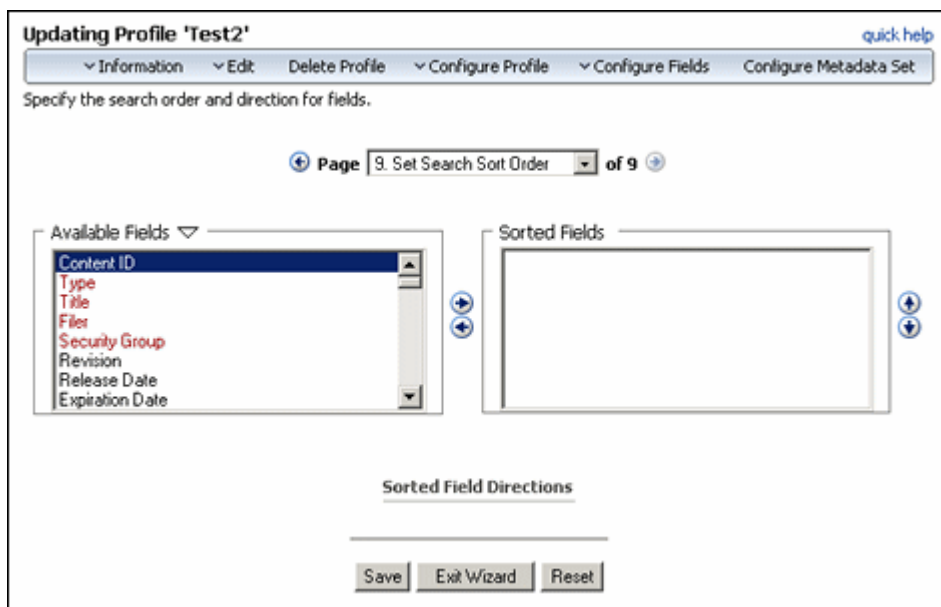
The Set Search Sort Order page is used to specify the search order and direction for fields in the current profile. To access this page select it through the profile configuration Wizard, or select **Configure Profile—Search Order** from the Page menu or Actions menu.

Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields list	Available fields that can be specified for search order and direction.
Sorted Fields list	Move field names in this list and use the vertical arrows to sort them in the desired order for searching.
Sorted Field Directions	Each field in the Sorted Fields list is also listed here with a checkbox to use if the field should be sorted in ascending order.

Set Script Page
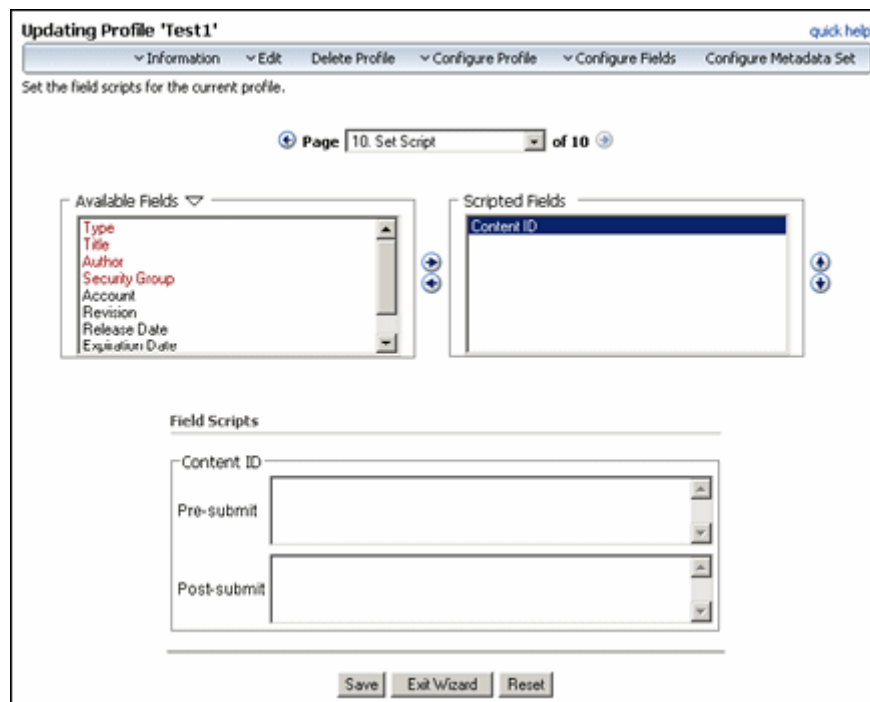
The Set Script page is used to associate specified Idoc Script to the profile or to a field in the profile. The Idoc Script is activated whenever the profile is submitted. To access this page select it through the profile configuration Wizard, or select **Configure Fields—Scripts** from the Page menu or Actions menu.

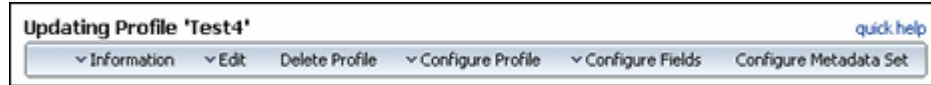| Feature	Description
Page field	Displays the current page name in the Wizard. Arrows enable you to move forward or backward through Wizard pages. A dropdown menu enables you to directly select a specific page.
Available Fields list	Fields that can be specified for search order and direction.
Scripted Fields list	Fields for which Idoc Script is associated. Use the vertical arrows to determine the order in which fields are processes.
Field Scripts	
<name>	Field name as selected in the Scripted Fields list.
Pre-submit field	Idoc Script that is activated for the field before the profile is submitted.
Post-submit field	Idoc Script that is activated for the field after the profile is submitted.

Actions Menu

The Actions menu is used to access most of the menu selections that can also be accessed from the Page menu on a Profile Information Page (page 4-6) to view and manage profiles. The Actions menu is accessed via the Actions icon, which is displayed for each profile on the List Profiles Page (page 3-18).

Menu Item	Description
Profile Information	Displays the List Profiles Page (page 3-18).
Edit	Provides access to the following actions: • Update Profile: see Create/Edit Profile Page (page 3-19) • Copy Profile: see Copy Profile Page (page 4-9) • Move to Configuration Manager (only if a content system profile): see Profiles Configuration Page (Administrators Only) (page 4-10)
Delete Profile	Deletes the currently displayed profile. See Deleting a Profile (page 4-3).
Configure Profile	Provides access to the following actions: • Activation Conditions: see Set Activation Conditions Page (page 3-31) • Limit Access: see Limit Access Page (page 3-33) • Search order: see Set Search Sort Order Page (page 3-34)
Configure Fields	Provides access to the following actions: • Field Configurations: see Configure Fields Page (page 3-22) • Defaults: see Set Defaults Page (page 3-24) • Groups: see Group Fields Page (page 3-25) • Labels: see Set Labels Page (page 3-27) • Descriptions: see Set Descriptions Page (page 3-28) • Restricted Options: see Restrict Options Page (page 3-29)

Page Menu

The Page menu is used to access options for modifying an existing profile.

Feature	Description
Information option	Provides access to these functions: • Profile Information: see Profile Information Page (page 4-6) • Browse Profiles: see List Profiles Page (page 3-18)
Edit option	Provides access to these functions: • Update Profile: see Create/Edit Profile Page (page 3-19) • Copy Profile: see Copy Profile Page (page 4-9) • Move to Configuration Manager: see Profiles Configuration Page (Administrators Only) (page 4-10)
Delete Profile option	Deletes the current profile. See Deleting a Profile (page 4-3).
Configure Profile option	Provides access to these configuration functions: • Activation Conditions: see Set Activation Conditions Page (page 3-31) • Limit Access: see Limit Access Page (page 3-33) • Search Order: see Set Search Sort Order Page (page 3-34)

| Feature	Description
Configure Fields option	Provides access to these configuration functions: • Field Configurations: see Configure Fields Page (page 3-22) • Defaults: see Set Defaults Page (page 3-24) • Groups: see Group Fields Page (page 3-25) • Labels: see Set Labels Page (page 3-27) • Descriptions: see Set Descriptions Page (page 3-28) • Restricted Options: see Restrict Options Page (page 3-29)
Configure Metadata Set option	**Administrator Only:** Provides access to the Profiles Configuration Page (Administrators Only) (page 4-10) for selecting or changing the trigger field for profiles.

Wizard Page Menu
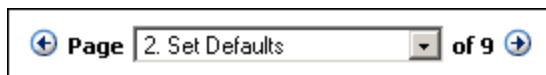
The Wizard Page menu is used to move between Wizard pages when creating or updating a profile configuration. This dropdown menu enables you to select any of the available configuration options and move directly to the page. The arrows enable you to move forward or backward one page with each click.

MANAGING PROFILES

OVERVIEW

This section discusses the different tasks involved in managing system and personal profiles.

Concepts

Tasks

Interface

Important: You cannot use Simple Profiles to edit profiles created with the Configuration Manager Content Profiles applet.

ABOUT PROFILE MANAGEMENT

Keep the following points in mind when you manage system and personal profiles created with the Simple Profiles component:

❖ A copied profile contains all of the information in the original profile. Make certain to change any labels, defaults, or security groups in the copied profile.

❖ All management functionality (updating, copying, deleting) is available from the Action Menu on the Profile Information Page (page 4-6).

❖ When creating a profile, if you exited the wizard before finishing the profile by using the **Exit Wizard** option, any changes you made (defaults, descriptions, etc.) up to that point by using the Save button are saved. You cannot use the Reset button to change them. You will need to edit them using the Update option on the Actions menu. See Saving, Resetting, and Exiting the Design Process (page 3-8) for details.

❖ **Administrators Only:** If you move a profile to the Content Profiles applet you can no longer modify the profile using Simple Profiles.

❖ **Administrators Only:** If you are familiar with Content Profile functionality, you can view the details of profiles created with Simple Profiles by using the Rules tab on the Configuration Manager. All of the rules created with the Simple Profile appear on that tab.

Caution: Do not edit any rules created for a Simple Profile by using the Rules tab. Editing or deleting the rules invalidates the profiles.

PROFILE MANAGEMENT TASKS

The following tasks are used when managing Simple Profiles:

❖ Viewing Profile Information (page 4-3)

❖ Deleting a Profile (page 4-3)

❖ Copying a Profile (page 4-3)

❖ Moving a System Content Profile to Configuration Manager (Administrators Only) (page 4-4)

❖ Changing a Trigger Field (Administrators Only) (page 4-5)

Viewing Profile Information

Follow this procedure to view information about system and personal profiles:

1. Access the **List Profiles Page** (page 3-18)**.**

2. Click the Profiles icon for the profile you wish to view.

3. The Profile Information Page (page 4-6) is displayed, showing the details of the content profile.

Deleting a Profile

Follow this procedure to remove a system or personal profile:

1. Access the **List Profiles Page** (page 3-18).

2. To delete a specific profile, use one of the following methods:

   ❖ Click the Info icon for the profile to delete. The Profile Information Page (page 4-6) is displayed, showing the details of the profile. On the Page menu select **Delete Profile**.

   ❖ Select the Actions menu for the profile and select **Delete Profile**.

   A message is displayed, prompting you to confirm the deletion.

3. Click **OK** to delete the profile, or **Cancel** to retain the profile.

   The List Profiles Page (page 3-18) is displayed.

Copying a Profile

Follow this procedure to copy a system or personal profile:

1. Access the **List Profiles Page** (page 3-18).

2. To delete a specific profile, use one of the following methods:

   ❖ Click the Info icon for the profile to copy. The Profile Information Page (page 4-6) is displayed, showing the details of the system profile. On the Page menu select **Edit—Copy Profile**.

❖ Select the Actions menu for the profile and select **Edit—Copy Profile**.

The Copy Profile Page (page 4-9) is displayed.

3. Enter the new name and new display label.

4. Click **Copy** when done. Click **Reset** to clear any edits you made.

The Profile Information Page (page 4-6) is displayed for the newly copied profile.

5. Update the profile as needed using the instructions described in Updating a Profile (page 3-16).

Moving a System Content Profile to Configuration Manager (Administrators Only)

Important: If you move a system profile to the Content Profiles applet in the Configuration Manager, you can no longer modify or work with the profile using the Simple Profiles component.

Follow this procedure to move a system content profile to the Configuration Manager:

1. Access the **List Profiles Page** (page 3-18).

2. To move a system content profile to the Configuration Manager, use one of the following methods:

❖ Click the Info icon for the system profile to be moved. The Profile Information Page (page 4-6) is displayed, showing the details of the system profile. On the Page menu select **Edit—Move to Configuration Manager**.

❖ Click the Actions menu for the profile to move, then select **Edit—Move to Configuration Manager**.

A message is displayed, prompting you to confirm the move.

3. Click **OK** to move the profile, or **Cancel** to leave the profile as is.

The List Profiles Page (page 3-18) is displayed.

Changing a Trigger Field (Administrators Only)

Follow this procedure to modify the trigger field for content profiles:

1. Access the **List Profiles Page** (page 3-18).

2. To change the trigger field for content profiles, on the page click **Configure Metadata Set**.

   The Profile Information Page (page 4-6) is displayed.

3. Select a different trigger field from the dropdown list and click **Save**.

   A confirmation prompt is displayed showing that the profiles configuration has been saved.

4. Click **OK**.

   The List Profiles Page (page 3-18) is displayed.

INTERFACE PAGES

This section contains descriptions of the following interface pages for viewing and managing system and personal profiles:

❖ Profile Information Page (page 4-6)

❖ Copy Profile Page (page 4-9)

❖ Profiles Configuration Page (Administrators Only) (page 4-10)

Profile Information Page

The Profile Information page is used to view summary information about a specific profile. To access profile information do one of the following:

❖ Click the Actions menu for a profile listed on the List Profiles Page (page 3-18), then select **Profile Information**.

❖ On the Page menu for an open profile select **Information—Profile Information**.

Feature	Description
Page Menu	
Browse Profiles	Displays the List Profiles Page (page 3-18).
Edit menu	Provides access to the following actions: • Update Profile: see Create/Edit Profile Page (page 3-19) • Copy Profile: see Copy Profile Page (page 4-9) • Move to Configuration Manager (only if a content system profile): see Moving a System Content Profile to Configuration Manager (Administrators Only) (page 4-4)
Delete Profile	Deletes the currently displayed profile.
Configure Profile menu	Provides access to the following actions: • Activation Conditions: see Set Activation Conditions Page (page 3-31) • Limit Access: see Limit Access Page (page 3-33) • Search order: see Set Search Sort Order Page (page 3-34)
Configure Fields menu	Provides access to the following actions: • Field Configurations: see Configure Fields Page (page 3-22) • Defaults: see Set Defaults Page (page 3-24) • Groups: see Group Fields Page (page 3-25) • Labels: see Set Labels Page (page 3-27) • Descriptions: see Set Descriptions Page (page 3-28) • Restricted Options: see Restrict Options Page (page 3-29)

Feature	Description
Configure Metadata Set	Displays the Content Profiles Configuration screen, which enables you to change the trigger field to a different type.
Profile Fields	
Profile Name field	Profile name.
Display Label field	Profile display label.
Description field	Description of the profile.
Trigger field	Trigger for the profile from the list.
Is Global checkbox	Indicates if the trigger is global or specific to a user. Default is FALSE.
Priority field	Number that specifies the priority of field priority. The default is 10.
Clear Search Trigger Value checkbox	On the Search page do not use the profile's trigger value. The default is TRUE.
Wizard Fields (The following list summarizes the most commonly seen options.)	
Configure Fields	Fields types are configured. The default is TRUE.
Set Defaults	Defaults are configured. The default is TRUE.
Group Fields	Group fields are configured. The default is TRUE.
Set Labels	Labels are configured. The default is TRUE.
Set Descriptions	Descriptions are configured. The default is TRUE.
Restrict Options	Options to be restricted are configured. The default is TRUE.
Set Activation Conditions	Activation conditions for the profile are configured. The default is TRUE.

Feature	Description
Limit Access	Access limits for the profile are configured. The default is TRUE.
Set Search Sort Order	A search sort order is configured. The default is TRUE.
Set Script	Associate specified Idoc Script so it is activated before the profile is submitted or after the script is submitted. The default is TRUE.

Copy Profile Page

The Copy Profile page is used to copy the information in a profile to a new profile. To access this page do one of the following:

❖ Click the Actions icon for a profile on the List Profiles Page (page 3-18) and select **Edit—Copy Profile**.

❖ On the Page menu for an open profile select **Edit—Copy Profile**.

Feature	Description
Profile Name field	Enter the unique profile name of an existing profile.
Display Label field	Enter the unique display label of an existing profile.

Feature	Description
Copy button	Copies the profile to a new profile.
Reset button	Clears the fields of information.

Profiles Configuration Page (Administrators Only)

The Profiles Configuration page is used to select or change the trigger field for all profiles. To access this page, click **Configure Metadata Set** on the Page menu.

Caution: The trigger field can be changed. However, when it is changed, profiles may become invalid and it is the responsibility of the system administrator to resolve the situation. The user interface provides hints about invalid profiles.

Feature	Description
Trigger Field list	Metadata fields that are defined as option lists are included in this dropdown list.
Save button	Saves the trigger field change to the metadata set.
Reset button	Clears changed information.

THIRD PARTY LICENSES

OVERVIEW

This appendix includes a description of the Third Party Licenses for all the third party products included with this product.

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library

  version 1.2.3, July 18th, 2005

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