

Oracle® Collaboration Suite

Using Oracle Files

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Oracle Files is designed as an enterprise file server replacement, with added content management features (for example, versioning) that enable users to collaborate more productively. All content is stored in an Oracle database.

Oracle Files provides:

- Support for file-sharing and collaboration protocols.
- A Web UI, designed for large-scale deployments.
- Workspace-based collaboration.
- Content management features like extensible metadata, versioning, and content-based searching.
- Workflow integration for approval and routing.
- User and administrator options for single file recovery.
- Scalability, reliability, security, and platform independence.

These features and capabilities are designed to help IT managers lower costs through file server consolidation while simultaneously making employees more productive.

This guide provides a high-level overview of Oracle Files concepts, features and functionality.

This guide contains the following topics:

- [Documentation Accessibility](#)
- [Oracle Files Administration Hierarchy](#)
- [Oracle Files End-User Concepts and Features](#)
- [Logging into Oracle Files for the First Time](#)
- [Industry-Standard Protocol Servers](#)

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- [Oracle FileSync Client Software](#)

1 Documentation Accessibility

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2 Oracle Files Administration Hierarchy

In Oracle Files there are three levels of administration.

2.1 Subscriber Administrator

In Oracle Files, a Subscriber is an organizational entity where users can collaborate on files and folders. Each Subscriber has its own Subscriber Administrator. The Subscriber Administrator, an enhanced user, administers the Subscriber by managing quota, users, and categories, specifying Subscriber settings, and restoring files from the Archive. The Subscriber Administrator has a different view in Oracle Files than regular users.

2.2 Site Administrator

The Site Administrator manages Oracle Files Subscribers. A Subscriber is a discrete organizational entity where users can collaborate on files and folders. Users in one Subscriber do not have access to the content of users in another Subscriber. The Site Administrator creates, modifies, and deletes Subscribers. The Site Administration has a different view in Oracle Files than regular users.

2.3 System Administrator

The System Administrator is responsible for managing the Oracle Files domain, starting and stopping the domain controller, nodes, service and servers, and tuning the system to ensure reliability and performance.

See Also: *Oracle Files Administrator's Guide* for more information about administering Oracle Files

3 Oracle Files End-User Concepts and Features

This section contains the following topics:

- [File Management](#)
- [Workspaces](#)
- [Trash](#)
- [Searching](#)
- [Categories](#)
- [Versioning](#)
- [Review Process](#)
- [Edit-in-Place](#)
- [File Synchronization](#)

3.1 File Management

Each user has a My Public Files folder where he or she can store files, viewable by all Subscriber users.

Each user has a My Private Files folder where only he or she can access, store, and view files.

Collaborative file management in Oracle Files allows users to:

- Send links to documents instead of attaching documents to emails
- Work collaboratively on one copy of a document, so that changes are immediately available, and users do not overwrite each other's changes
- Control access to content through Workspace membership

3.1.1 Public Files and Private Files Folder Quota

A user's Public and Private Files folders are allocated a storage quota. The contents of each folder, including the Trash folder, count against allocated quota for that folder. Exceeding allocated quota prevents the user from storing additional content in the folder. A user can, however, request increased quota from the Subscriber Administrator.

See Also: "File Management" in Oracle Files online help for detailed information

3.2 Workspaces

A Workspace is where a selected group of Oracle Files users store and collaborate on files and folders. The content of a Workspace is visible and editable only by its members. A Workspace includes at least one administrator, and can include participants and viewers.

Workspace collaboration features of Oracle Files allow users to:

- Send links to documents instead of attaching documents to emails.
- Work collaboratively on one copy of a document -- changes are immediately visible to all members of the Workspace, and users do not overwrite each other's changes.
- Control access to content through Workspace access levels.
- Copy and move Workspace content from one location to another.

3.2.1 Workspace Access Levels

Users may be assigned various levels of access to a Workspace.

- **Workspace Administrator:** The role of the Workspace Administrator is to manage the Workspace. The management role includes such functions as adding and removing Workspace members, modifying member access, requesting more Workspace quota, and specifying the visibility and Workspace type. The Workspace Administrator has full access to the files and folders of the Workspace, and can unlock files that have been locked by other Workspace members.
- **Participant:** A Workspace participant can edit the contents and properties of files and folders in the Workspace. A Workspace participant can copy and move items to and from the Workspace, and can delete files and folders from the Workspace, and the Workspace's Trash folder.
- **Viewer:** A Workspace viewer is restricted to viewing Workspace files and folders.

3.2.2 Workspace Quota

Each Workspace is allocated a storage quota. The contents of each Workspace, including its Public folder and Trash folder, count against the Workspace's allocated quota. Exceeding the Workspace's quota prevents Workspace members from storing additional content in the Workspace. The

Workspace's administrators can, however, request increased quota from the Subscriber Administrator.

See Also: "Workspace Management" in Oracle Files online help for detailed information

3.3 Trash

Files deleted in Private and Public folders are moved to Personal Trash. Files deleted in Workspaces are moved to a corresponding Trash folder. A user can request that the Subscriber Administrator restore files that have been emptied from the trash. Content moved to trash counts against quota until trash is emptied.

See Also: "File Management" in Oracle Files online help for detailed information

3.4 Searching

Users can conduct simple or advanced searches. Advanced searching allows users to refine and combine search criteria.

See Also: "Search Options" in Oracle Files online help for detailed information

3.5 Locking

Oracle Files offers document locking functionality at three levels:

- **Manual Lock:** Users can manually lock and unlock files through the Oracle Files Web User Interface. If a file is manually locked, a Manual Lock icon displays in the status column for that file, and other Workspace members have read-only access to the file until it is unlocked. When the file is unlocked, the Manual Lock icon no longer displays in the Status column.
- **Locked for Editing:** A Locked for Editing icon displays in a file's status column when a Workspace member is currently editing a file directly from a client application (such as Microsoft Office over Microsoft Web Folders). Until the file is unlocked, other Workspace members have read-only access to the file. When the file is unlocked, the Locked for Editing icon no longer displays in the Status column.
- **Locked for Review:** Oracle Files automatically locks files when they have been submitted for review to a Review Process (see "[Review Process](#)" on page 6 for more information). If a file is locked

for review, the Locked for Review icon displays in the Status column for that file. When the review process is complete, the file is unlocked and the Locked for Review icon no longer displays in the Status column.

See Also: "File Management" and "Review Processes and Workflow" in Oracle Files online help for detailed information

3.6 Categories

By associating categories with files or folders and modifying the attributes of a category, users can organize and classify their information. Users can also search for files by category and a category's attributes. The Oracle Files Subscriber Administrator creates categories.

See Also: "Categories" in Oracle Files online help for detailed information

3.7 Versioning

Users can retain a history of file modifications by creating and saving one or more snapshots of a file.

See Also: "Versioning" in Oracle Files online help for detailed information

3.8 Review Process

Using Oracle Files Review Process features, users can submit files for review, and select other users to approve, reject, or just review these files.

The Oracle Files Review process is implemented using Oracle Workflow. Using a review process, any Workspace member can submit for review one or more files from their Workspace to other members of their Workspace. A review process ends in the approval or rejection of these files, or can expire or be cancelled prior to their approval or rejection. Members can either be Approvers or Reviewers of a review process:

- **Approver:** After receiving notification from Oracle Workflow that he or she has been asked to approve one or more files, an Approver must either approve or reject the files that have been submitted for review. An Approver cannot approve or reject individual files associated with one Review Process, but must approve or reject the files as a whole. The Workspace member, who initiated the Review Process, is notified of its approval or rejection.

- **Reviewer:** After receiving notification from Oracle Workflow that he or she has been asked to review one or more files, a Reviewer can review the files. He or she can neither approve or reject files that have been submitted for review.

You can also specify that files in a review process be automatically moved to a new location, copied to a new location, versioned, or deleted upon completion of a Review Process.

When you complete the Review Process, the initiator is notified of the approval or rejection of the Review Process.

3.8.1 Custom Review Processes

Your Site Administrator may provide custom review processes, also called workflow processes, to use in Oracle Files. A *workflow designer*, a person with the necessary skills to design a workflow process in Oracle Workflow Builder, creates the custom workflow process, and the Site Administrator registers the custom workflow process with Oracle Files.

You will be able to select any custom workflow process registered by the Site Administrator when you use Review Process functionality in Oracle Files.

See Also: "Review Processes and Workflow" in Oracle Files online help for detailed information

3.9 Edit-in-Place

Using Microsoft Web Folders, a user can open and edit an Oracle Files file and save his or her changes directly back to Oracle Files. When a user opens a file from Microsoft Web Folders to edit in Microsoft Office, the file is automatically locked in Oracle Files. Any changes made to the file are automatically saved back to Oracle Files. When the user closes the file in Microsoft Office, the file is automatically unlocked in Oracle Files. See "[Accessing Oracle Files Through Web Folders](#)" on page 13 for information on setting up Web Folders.

See Also: "File Management" in Oracle Files online help for detailed information

3.10 File Synchronization

Oracle FileSync synchronizes all file changes between a local machine and Oracle Files, ensuring that the contents of selected local folders and remote folders match.

See "[Installing Oracle FileSync](#)" on page 14 for instructions on how to install Oracle FileSync. Once you have installed Oracle FileSync, the online help for this application offers detailed instructions for synchronizing local and remote folders.

4 Logging into Oracle Files for the First Time

If you are logging into Oracle Files for the first time, the General User Preferences page appears. On this page, you can begin customizing the way you work with Oracle Files.

When logging in for the first time, you can set the following preferences:

- [Change your Password](#)
- [Set Password Prompting](#)
- [Specify Items Per Page](#)
- [Enable or Disable Your Public Folder](#)
- [Specify a Display Language](#)
- [Specify a Time Zone](#)
- [View Quota and Storage](#)

4.1 Change your Password

There are two passwords used in Oracle Files, the Single Sign-On (SSO) password and the Files-Specific password.

The Single Sign-On password may be used by all Oracle Applications that use the same SSO server. Therefore, if you log into SSO once, you will be logged into each Oracle application that uses Single Sign-On.

The Files-Specific password is used only by Oracle Files, and allows you to access your Oracle Files content through protocols like FTP and AFP. The Oracle Files system administrator determines which protocols use the Files-Specific Password.

4.1.1 Change Your Single Sign-On Password

1. Click **Preferences** from anywhere in Oracle Files.
The General User Preferences page displays.
2. Click **Password**.
The Password User Preferences page displays.
3. Click **Change Single Sign-On Password**.

4. Enter your existing Single Sign-On password, then enter your new Single Sign-On password, and confirm.
5. Click **Apply** to accept your change and continue working in Password User Preferences.

4.1.2 Change Your Files-Specific Password

1. Click **Preferences** from anywhere in Oracle Files.
The General User Preferences page displays.
2. Click **Password**.
The Password User Preferences page displays.
3. Enter your existing Files-Specific password, then enter your new Files-Specific password and confirm.
4. Click **Apply** to accept your change and continue working in General User Preferences.

4.2 Set Password Prompting

The Subscriber Administrator specifies how often you are prompted for your password in Microsoft Web Folders. However, the Subscriber Administrator can provide you with the ability to optionally configure your own password prompting settings in User Preferences.

Note: For this option to function correctly, you must enable "cookies" in your browser. See "Preferences" in Oracle Files online help for detailed information.

To specify how often you would like Oracle Files to prompt you for a password in Microsoft Web Folders:

1. Click **Preferences** from anywhere in Oracle Files.
The General User Preferences page displays.
2. Click **Password**.
The Password User Preferences page displays.
3. From the Prompt for Password drop-down list, select how often you would like to be prompted for your password in Microsoft Web Folders. Your choices are:
 - Once a Month
 - Once a Week

- Once a Day
 - Every 8 Hours
 - Every 4 Hours
 - Always
4. Click **Apply** to accept your change and continue working in General User Preferences.

4.3 Specify Items Per Page

As you continue to work with Oracle Files, the contents of your folders will increase. Each user prefers to view his or her lists of items (files and folders) differently, so in Oracle Files you can specify the number of items (files and folders) you would like to appear on each Browse Files page.

To specify the number of items that appear on a Browse Files page:

1. Click **Preferences** from anywhere in Oracle Files.
The General User Preferences page displays.
2. In the Items Per Page field, enter the number of items (files and folders) that should appear on each Browse Files page.

When specifying a range, consider the size of your screen and the inconvenience of scrolling through long lists. Sometimes it is more manageable to restrict the number of items that appear in each page.

3. Click **Apply** to accept your change and continue working in General User Preferences.

4.4 Enable or Disable Your Public Folder

Depending upon your Subscriber default settings, your Public folder may or may not be enabled. If the option is enabled, you can store files and folders in your Public folder so any other user in the Subscriber can view them from All Public Files. If the option is disabled by the Subscriber Administrator, you will not have the choice to enable or disable your Public folder. However, you may request that the Subscriber Administrator modify this setting.

To change your Public folder setting:

1. Click **Preferences** from anywhere in Oracle Files.
The General Users Preferences page displays.
2. Click **Advanced**.
The Advanced User Preferences page displays.

3. In the Public folder section, select **On** to display the folder, or **Off** to hide the folder.

Note: Disabling your Public folder removes your Public folder from All Public Files. Your Public folder will not be visible from All Public Files, and you will be unable to store files in your Public folder.

If you have files stored in your Public Folder, the disable option is not available. In order to disable your Public Folder, you would first need to remove all content from the folder.

4. Click **Apply** to accept your change and continue working in General User Preferences.

4.5 Specify a Display Language

To specify a display language:

1. Click **Preferences** from anywhere in Oracle Files.
2. In the General User Preferences page, from the Display Language drop-down list, select a language.
3. Click **Apply** to accept your changes and continue working in General User Preferences.

4.6 Specify a Time Zone

Specifying your time zone ensures appropriate time stamping of files. When traveling, you can reset your time zone according to your location.

1. Click **Preferences** from anywhere in Oracle Files.
The General User Preferences page displays.
2. Select a time zone from the Time Zone drop-down list.
3. Click **Apply** to accept your change and continue working in General User Preferences.

4.7 View Quota and Storage

You can view your quota usage and storage levels in the Quota Used field.

Quota is a measurement of your storage usage in Oracle Files. This measurement appears both as a percentage of your quota, and the amount of storage that you use in comparison to your total storage quota.

5 Industry-Standard Protocol Servers

Oracle Files supports a wide range of protocols through its various protocol server implementations, including the following:

- AFP, the AppleTalk Filing Protocol, enables Macintosh users to use Oracle Files as if it were an AppleShare server. MacOS 9.x and above supports AFP over TCP, which allows AFP services to be made available over the Internet and networks that use TCP/IP as the underlying transport.
- FTP, the File Transfer Protocol, is used for file transfers across the Internet.
- HTTP, the Hypertext Transfer Protocol, is used for Web browser-based access. HTTP has been extended with WebDAV, a protocol designed for Internet collaboration. Currently, the most widespread WebDAV client is the Web Folders extension to Windows Explorer, also known as Network Places on Windows 2000/XP. See [Accessing Oracle Files Through Web Folders](#), below, for instructions on how to set up Web Folders.
- NFS, the Network File System, is a mechanism for mounting remote file systems on UNIX platforms.
- NTFS, the NT File System (for Windows NT and Windows 2000), allows you to map a local drive to the Oracle Files repository on the server machine.
- SMB, the low-level server message block file-sharing protocol, lets you map Oracle Files as a network drive or browse to it via the Network Neighborhood.

Note: SMB is only supported when Oracle Files is running on a UNIX or Linux server. When Oracle Files is running on a Windows server, it uses NTFS rather than SMB.

Users can connect to Oracle Files using protocols appropriate to their platform. For example, Mac users can connect from the Chooser to Oracle Files as if it were any other AppleShare server, Windows users can map a network drive or connect using Web Folders, and UNIX clients can connect using NFS.

5.1 Accessing Oracle Files Through Web Folders

Web Folders is one of the most common protocol access choices for Oracle Files users. To set up access to Oracle Files via Web Folders, perform the following tasks:

1. Install Web Folders if necessary:
 - Open the Control Panel by clicking **Start**, then **Settings**, then **Control Panel**.
 - Select **Add/Remove programs**.
 - Select **Microsoft Internet Explorer 5.0** and click **Add/Remove**.
 - Select **Add a Component**.
 - Click **OK**.
 - Scroll through the list of components and select **Web Folders**.
 - Wait for the Windows Update download to complete.

Note: Web Folder functionality is automatically installed with Microsoft Windows 2000 and Microsoft Windows XP.

2. Setup Web Folders
 - In Windows NT, open **Windows Explorer**.
In Windows 2000/XP, open **My Network Places**.
 - In Windows NT, open the **Web Folders** folder and double-click **Add Web Folder**.
In Windows 2000/XP, double-click **Add Network Place**.
 - Follow the wizard directions. When connected, type in your userid and password. You can name the Web folder anything you wish.

Once your Web folder is set up, your Oracle Files Web Folder will be listed in the Web Folders folder or in the Network Places folder.

6 Oracle FileSync Client Software

In addition to using the networking protocols or client applications native to the Windows operating system, Windows users can install and use Oracle FileSync to keep local directories on a desktop machine and folders in Oracle Files synchronized.

6.1 Installing Oracle FileSync

Oracle FileSync is Windows client software that enables users to keep files synchronized between their local machine and Oracle Files. To install Oracle FileSync, users should follow these steps:

1. Save and exit all Windows applications.
 - If you have a previous release of Oracle FileSync software installed, be sure to first uninstall it by using **Add/Remove Programs** in the control panel.
2. Log in to Oracle Files and click **Help**.
3. The main online help page displays.
4. Click the link in the Oracle FileSync section.
5. Save the install executable to your hard drive.
6. Double-click **FileSync.exe** to run the installation program.

Follow the instructions and accept the defaults. The application will be installed in the Windows client machine in the directory:

```
c:\Program Files\Oracle\Oracle 9iFS FileSync
```

7. Select **Oracle FileSync** from the Windows Start > Programs menu to start the Oracle FileSync application.