Oracle® Content Database

Application Administrator's Guide for Oracle WebCenter Suite

10*g* (10.1.3.2)

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Oracle Content Database Application Administrator's Guide for Oracle WebCenter Suite, 10*g* (10.1.3.2)

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Preface

Oracle Content Database (Oracle Content DB) is a consolidated, database-centric content management application that provides a comprehensive, integrated solution for file and document life cycle management. Oracle Content DB provides both Windows and Web interfaces. This release of Oracle Content DB ships with Oracle WebCenter Suite, a set of tools and services that you can use to build applications that are transactional, analytical, and dynamic in a product context.

Oracle Content DB runs on Oracle Application Server and Oracle database, and provides a scalable content management repository. This guide describes application administration functions for Oracle Content DB.

Audience

This document is intended for Oracle Content DB application administrators, such as User, Category, or Quota Administrators. Oracle Content DB system administrators should refer to *Oracle Content Database Administrator's Guide* for information about system administration tasks.

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Related Documents

For more information, see the following documents:

Oracle Content DB

- *Oracle Content Database Administrator's Guide*

Oracle WebCenter Framework

- *Oracle WebCenter Framework Developer's Guide*
- *Oracle WebCenter Framework Error Messages Guide*
- *Oracle WebCenter Framework Tutorial*

Oracle Application Server

- *Oracle Application Server Concepts*
- *Oracle Application Server Installation Guide* for your platform
- *Oracle Application Server Release Notes* for your platform
- *Oracle Application Server Administrator's Guide*
- *Oracle Application Server Performance Guide*
- *Oracle HTTP Server Administrator's Guide*
- *Oracle BPEL Process Manager Developer's Guide*
- *Oracle Internet Directory Administrator's Guide*

Oracle Database

- *Oracle Database Administrator's Guide*
- *Oracle Database Concepts*
- *Oracle Database Backup and Recovery Basics*
- *Oracle Database Advanced Security Administrator's Guide*
- *Oracle Database Performance Tuning Guide*
- *Oracle Database Backup and Recovery User's Guide*
- *Oracle Database Net Services Administrator's Guide*
- *Oracle Database Globalization Support Guide*
- *Oracle Database Oracle Clusterware and Oracle Real Application Clusters Administration and Deployment Guide*
- *Oracle Text Reference*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Oracle Content DB Overview

This chapter provides an overview of the Oracle Content DB application. This chapter contains the following topics:

What Is Content Management?

Content management systems enable organizations to support the life cycle of content. The life cycle of content typically consists of creating, editing, publishing, and archiving. For example, content is created by one or more authors. Over time, that content may be edited and approved for publication. Once the content has been published, it may be replaced by another form of content and archived or removed from use.

Content management can improve an organization's knowledge sharing and communication capability. Content management systems improve users' efficiency by making content readily available.

In addition, content management systems may include version control, workflow, security, and more.

About Oracle Content DB

Oracle Content DB is a consolidated, database-centric content management system that provides a comprehensive, integrated solution for file and document life cycle management. Oracle Content DB enables enterprise customers to use one highly scalable, manageable, and usable application to manage all of their unstructured information.

About Oracle Content DB Administration

There are two types of administration for Oracle Content DB: system administration and application administration.

- System administration involves managing Oracle Content DB processes, such as starting and stopping the nodes, services, and servers, tuning the system to ensure reliability and performance, changing **Site** settings, and registering custom workflow processes. System administrators typically use Oracle Enterprise

Manager 10*g* Application Server Control (Application Server Control) to perform system administration functions for Oracle Content DB.

■ Application administration involves managing users, **quota**, Libraries, categories, and content at the Site and **Container** levels. Application administration is divided into multiple administrator roles that can be assigned at the Site level only, or at both the Site and Container levels.

A single user can act in multiple roles. In addition, each role has a different set of access privileges.

Signing On to Oracle Content DB for the First Time

Initially, when Oracle Content DB is installed, a default user is assigned. The user name depends on the user repository selected for use with Oracle Content DB:

■ If you are using Oracle Internet Directory as the user repository for Oracle Content DB, use the `orcladmin` user name and password to log into Oracle Content DB for the first time. This user has all the application administration roles.

■ If you are using a third-party LDAP server as the user repository for Oracle Content DB, use the user name and password you provided during Oracle Content DB installation to log into Oracle Content DB for the first time. This user has all the application administration roles.

■ If you are using a file-based user repository with Oracle Content DB, use the `contentadmin` user name to log into Oracle Content DB for the first time. The password for this user is the same as the Oracle Content DB schema password. This user has all the application administration roles.

After you have created additional users in your user repository, and after those users have logged in to Oracle Content DB, you can delegate application administration roles to other users, as needed. A user can have more than one role, and more than one user may be assigned the same role.

In particular, you can designate the Security Administrator role to a user, and in turn, that Security Administrator can designate the remaining application administrator roles to other users.

Once users have been assigned administrator roles, they can sign in to the application as a regular user, and decide whether or not they want to be in administrator mode by selecting **Switch to Administration Mode**.

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Oracle Content DB Site-Level Administration

This chapter provides conceptual information for Oracle Content DB Site-level administration. This chapter contains the following topics:

- Oracle Content DB Site Administration
- Oracle Content DB Role Administration
- Oracle Content DB User Administration
- Oracle Content DB Category Administration

Oracle Content DB Site Administration

Site Administrators can provide the ability to grant public access for specific items and allow **Library** creation requests for the Site folder. Site Administrators can also specify which user **access roles** are available, as well as the order in which they appear under the Sharing tab.

Oracle Content DB Role Administration

Role Administrators can add, remove, and change the order of the roles that are available to users at the Library and Folder levels. Users assigned this role will be able to see the Role Administration link when they switch to **Administration Mode** in the Oracle Content DB Web client.

Oracle Content DB User Administration

Once a user has been provisioned into Oracle Content DB, they can sign in to the application.

User Administrators manage all users and groups within a Site. User Administrators can perform the following tasks:

- Set and modify user preference defaults
- Search for all users in a Site
- Add and remove members of a group
- Assign a group member the Group Manager role
- Create and delete groups

Managing Oracle Content DB Users

User Administrators can search for all users in a Site, as well as set and modify the following user default preferences:

- Set the number of files to list in a user's My Recent Files report

- Allow users to change how many files are listed in their My Recent Files report

- Determine how often users should be prompted for their password when using a **Web Distributed Authoring and Versioning (WebDAV)** client

- Allow users to change how often they are prompted for their password when using a WebDAV client

- Assign the document language, character set, and the character encoding when **UTF-8** does not work

Managing Oracle Content DB Groups

User Administrators manage all groups in a Site. They have Group Manager access for all groups in a Site, which allows them to add and remove members from a group, and assign the Group Manager role to a group member.

Once a Group Manager is assigned, then the Group Manager can modify and delete existing member properties of the groups they manage.

Oracle Content DB Category Administration

By associating categories with files and modifying the attributes of a category, users can organize and classify their information. Users can also search for files by category and by a category's attributes.

Users can categorize files by applying categories to them in the File Properties window. Configuration Administrators and administrators of Libraries and folders can exclude or specify required or optional categories for folders. If required, users must enter information for these categories when uploading or checking in files.

Categories can be divided into subcategories, and can have one or more attributes. Categories are created and configured for a Site by the Category Administrator. Categories are listed and sorted by name.

Category Administrators manage categories within a Site. They can create categories for a Site, defining a hierarchy of categories and subcategories available to users in a Site. In addition, Category Administrators modify and delete categories, as well as add additional categories to any point in the category hierarchy.

Managing Oracle Content DB Category Properties

Category Administrators can create, modify, and delete categories within a Site. A name must be provided for each category when it is created.

Category Administrators can also add and remove **category attributes**s. The only modification that can be made to an existing attribute is the default value, and whether or not it can be prompted.

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Oracle Content DB Site-Level and Container-Level Administration

This chapter provides conceptual information for Oracle Content DB Site and Container-level administration. This chapter contains the following topics:

- Oracle Content DB Container Administration
- Oracle Content DB Security Administration
- Oracle Content DB Library Administration
- Oracle Content DB Configuration Administrator
- Oracle Content DB Content Administration
- Oracle Content DB Quota Administration
- Other Oracle Content DB Roles

Oracle Content DB Container Administration

A **Container** is a special kind of folder that can contain other Containers or Libraries. Containers let Oracle Content DB administrators organize the folder hierarchy in a logical way. For example, Containers could be created for geographical regions or by division. Users can see only the Containers to which they have access.

Managing Oracle Content DB Containers

Container Administrators can create, remove, and modify Container properties, such as the name and description.

Only Container Administrators can create and delete Containers. Containers may have default folder configuration settings that are inherited by Libraries created in the Container. In addition, a Container can be configured to allow or to limit Library creation to users and groups with specific privileges. Container Administrators can also enable Library creation requests through a workflow process.

In addition, Containers have Library defaults for categories, workflow, and version creation. By default, these settings are inherited by all Libraries created in the Container. There are no default security settings for Libraries in Containers.

Only a Container Administrator can delete a Container.

Oracle Content DB Security Administration

Security Administrators can add, remove, or modify administrator and user access roles. Only Security Administrators can modify Site and Container access roles. They can also manage the access roles of Libraries, folders, and files within the Container.

Managing Oracle Content DB Administrator Roles

Security Administrators can assign administrative roles to any user in the Site. Each administrative role must be filled by at least one user.

Administration that can be performed only at the Site level is divided into the following roles:

- Site Administrator

  Can provide the ability to grant public access for specific items and allow Library creation requests for the Site folder. Site Administrators can also specify which user access roles are available, as well as the order in which they appear under the Sharing tab.

- Role Administrator

  Can rename roles and set role descriptions.

- User Administrator

  Manages groups and some user preference defaults.

- Category Administrator

  Creates categories for the Site, defining a hierarchy of categories and subcategories available to Site users; can add additional categories anywhere in this hierarchy; and can add or remove attributes for all categories.

Administration that can be performed at both the Site and Container levels is divided into the following roles:

- Quota Administrator

  Manages the quota of allocated disk space for Libraries throughout the Site.

- Configuration Administrator

  Manages all folders and files, as well as configuration settings. Sets the default and actual configuration of the Site, Containers, Libraries, and folders for categories, version creation, and **workflow processes**.

- Library Administrator

  Creates and sets the initial configurations and security of Libraries. Can rename and delete libraries, as well as set descriptions. Once the Library is created the Library Administrator cannot update the configuration or security settings.

- Container Administrator

  Creates and deletes Containers. Enables Library creation requests.

- Security Administrator

  Manages the security configurations for the Site, Containers, Libraries, folders, and files.

- Content Administrator

Manages all Site content; has access to all content in the Site; can unlock files locked by any user; can rename and delete Libraries; and can restore deleted files from the **archive**.

In addition to administration roles, the following roles can be assigned at the Site and Container levels:

- Container Viewer

  Views Containers and their properties. Can also request for Library creation if the option is enabled.

- Library Creator

  Views Container properties and can create Libraries, as well as view Container properties and create Libraries for sub Containers.

Managing Oracle Content DB User Access Roles

Security Administrators can assign access roles to any user in a Library, folder, and file. The following access roles can be assigned to users:

- Administrator
  - View the properties of a Library, folder, file, or link
  - View the content and category information of a file
  - Add, delete, or modify the category information of a file
  - Update the content of a file that is not version-controlled
  - Rename and update the properties of a Library, file, folder, or link
  - Modify the Library, folder, or file to which a link refers
  - Lock and unlock files
  - Add files to a folder
  - Copy, delete, and move folders and files
  - Create folders
  - Add a version for a version-controlled file
  - Check-in and check-out
  - Add, delete, or modify the security configuration of a Library, folder, or file
  - Update and delete Libraries
  - Add, delete, or modify any configuration category on a folder or file, except for quota
- Administrative Assistant
  - View the properties of a Library, folder, file, or link
  - Add files to a folder
  - Create folders
  - Add, delete, or modify the security configuration of a folder or file
  - Add, delete, or modify any configuration category on a folder or file, except for quota
  - Modify security settings

- Approver
  - View the properties of a Library, folder, file, or link
  - View the content and category information of a file
  - Add, delete, or modify the category information of a file
  - Update the content of a file that is not version-controlled
  - Rename and update the properties of a file or folder
  - Modify the Library, folder, or file to which a link refers
  - Lock and unlock files
  - Copy folders and files
- Author
  - View the properties of a Library, folder, or file
  - View the content and category information of a file
  - Add, delete, or modify the category information of a file
  - Update the content of a file that is not version-controlled
  - Rename and update the properties of a file or folder
  - Modify the Library, folder, or file to which a link refers
  - Lock and unlock files
  - Add files to a folder
  - Copy, delete, and move folders and files
  - Create folders
  - Add a version for a version-controlled file
- Commentator
  - View the properties of a Library, folder, or file
  - View the content and category information of a file
  - Add, delete, or modify the category information of a file
  - Update the content of a file that is not version-controlled
  - Rename and update the properties of a file or folder
  - Modify the Library, folder, or file to which a link refers
  - Lock and unlock files
  - Copy folders and files
- Content Editor
  - View the properties of a Library, folder, or file
  - View the content and category information of a file
  - Add, delete, or modify the category information of a file
  - Update the content of a file that is not version-controlled
  - Rename and update the properties of a file or folder
  - Modify the Library, folder, or file to which a link refers

- – Lock and unlock files

- – Add files to a folder

- – Copy folders and files

- – Create folders

- – Add a version for a version-controlled file

- ■ Custodian

  - – View the properties of a Library, folder, or file

  - – View the category information of a file

  - – Add, delete, or modify the category information of a file

  - – Rename and update the properties of a file or folder

  - – Modify the Library, folder, or file to which a link refers

  - – Lock and unlock files

  - – Add files to a folder

  - – Copy, delete, and move folders and files

  - – Create folders

- ■ Discoverer

  - – View the properties of a Library, folder, or file

- ■ Limited Author

  - – View the properties of a Library, folder, or file

  - – View the content and category information of a file

  - – Add, delete, or modify the category information of a file

  - – Update the content of a file that is not version-controlled

  - – Rename and update the properties of a file or folder

  - – Modify the Library, folder, or file to which a link refers

  - – Lock and unlock files

  - – Add files to a folder

  - – Create folders

  - – Add a version for a version-controlled file

  - – Copy folders and files

- ■ Manager

  - – View the properties of a Library, folder, or file

  - – Add files to a folder

  - – Create folders

  - – Add, delete, or modify the security configuration of a folder, or file

- ■ Organizer

  - – View the properties of a Library, folder, or file

  - – Add, delete, modify, and view the category information of a file

- – Update the content of a file that is not version-controlled
- – Rename and update the properties of a file or folder
- – Modify the Library, folder, or file to which a link refers
- – Lock and unlock files
- – Copy, delete, and move folders and files
- Reader
  - – View the properties of a Library, folder, or file
  - – View the content and category information of a file
  - – Copy folders and files
- Reviewer
  - – View the properties of a Library, folder, or file
  - – View the content and category information of a file
  - – Copy folders and files

Oracle Content DB Library Administration

Libraries are the first level in the Oracle Content DB folder hierarchy where content is added. Members must be added to a Library, and a Library is visible only to Site and Container level administrators and members of the Library.

Library Administrators can create and delete Libraries, but they cannot change the configuration settings of the Library after it has been created. Library Administrators can also move Libraries if they have Container Administrator privileges in the target Site or Container. In addition, Library Administrators can rename and set Library descriptions.

Oracle Content DB Configuration Administrator

Configuration Administrators set all the default actions for Libraries, including version creation, categories, and workflow. They can also modify any existing Library or folder settings to which they have access. In addition, Configuration Administrators set all the defaults for folders and documents within a Library.

Managing Workflow Processes

An Oracle Content DB workflow process defines a set of operations to be executed before or after a particular workflow-enabled action occurs.

A workflow process is triggered as soon as a workflow operation occurs in the target (destination) folder. For example, if the Delete operation is controlled by a workflow process, the workflow process starts automatically when a user deletes an item in the folder.

Oracle Content DB uses Oracle Workflow to manage workflow processes. Oracle Workflow is configured and integrated with Oracle Content DB during Oracle Content DB configuration.

Oracle Content DB comes with two default workflow processes:

- Parallel vote: All approvers review the submitted files or request at the same time. The number of approvals or rejections for a completed approval or rejection is set in the Workflow tab of the folder or Library Properties window.

- Serial approval: Each approver reviews the submitted files or request in turn, one approver at a time. All reviewers must approve the request to complete the approval process; a single rejection ends the review process, and results in the request being rejected.

Custom workflows can be created in Oracle BPEL Process Manager, an Oracle product that provides a framework for designing, deploying, monitoring, and administering processes based on BPEL standards.

Custom workflows can be blocking or nonblocking. A blocking workflow is one that requires an action for it to complete. For example, you can create a blocking workflow to handle document approval for publication: action on the part of the approvers is required before a document is published. An example of a nonblocking workflow is one that handles sending out notifications for published documents; in this case, a document can be published without waiting for the notifications to be sent.

Setting Oracle Content DB Library Defaults

Configuration Administrators can set the following default actions for a Library:

- Version creation

  - Set the version model (Automatic, Manual, or No Versioning)

  - Set the maximum number of versions to retain

  - Enable automatic version labeling and select label format

  - Disallow version model selections to be modified

- Categories

  - Select which categories are available

  - Select defaults for all categories available in the system, such as whether a category must be associated with all content, or whether a particular attribute should be required

  - Disallow category selections to be modified

- Workflow process

  - Select which operations are controlled by workflow processes

  - Select the workflow process used to control each workflow-controlled operation

  - Specify if a workflow requires approval

  - Add and remove **approvers**

  - Enable automatic approval of requests sent by approvers

  - Set the number of approvals required to approve

  - Set the number of rejections required to reject

  - Disallow workflow selections to be modified

Oracle Content DB Content Administration

Content Administrators manage all content within a Site. They have access to and can perform various file operations on all Site content. Content Administrators have access to all Libraries, with all permissions except for the ability to set or configure security. Content Administrators can delete Libraries, as well as manage the archive, and can perform various operations on files within the archive.

In addition, Content Administrators can view properties of a Site or Container, depending on whether or not they have Site-level or Container-level access.

Managing Oracle Content DB Content

Content Administrators manage and have access to all content in the Site. Content Administrators can perform the following file operations:

- Lock and unlock files

- Set and view content

- Set and view categories

- Add version-controlled files

- Delete Libraries

- Create, copy, and delete folders and files

- Modify Library, folder, and file names and descriptions

- Move files to and from various folders within the Site

    Content Administrators can also set virus scanning to detect and repair infected files, if antivirus integration has been enabled by the system administrator.

Managing the Oracle Content DB Archive

Content Administrators manage and have access to all content within the archive. In addition, Content Administrators can restore and remove files from the archive. However, Content Administrators cannot change the security settings of content in the archive.

Oracle Content DB Quota Administration

Quota is the measurement of storage usage in Oracle Content DB. Each Library is allocated a quota by the Quota Administrator. The contents of each Library and Trash folder count against the Library's allocated quota. When the Library's quota is exceeded, Library members cannot store additional content in the Library.

The Quota Administrator can modify the quota of any Library. Approving a quota request automatically changes the quota for the Library.

Quota Administrators can view and change quota through the Library Properties page. Quota Administrators can also browse or search for a Library by name. The Quota Administrator can view the allocated and used quota and change the allocated quota for any Library.

Quota Administrators can view files, folders, and the configuration of all Libraries, but they do not have access to the content.

Managing Oracle Content DB Library Quota

Quota Administrators manage all the quota within the Site, and can perform the following tasks:

- Search for Libraries within a Site

- View the consumed quota for the Site

- Assign the default quota for all newly created Libraries within the Site

- Approve requests for additional Library quota

- Modify allocated Library quota

Other Oracle Content DB Roles

In addition to administration roles, there are two additional roles that can be assigned at the Site and Container levels: Container Viewer and Library Creator.

Container Viewers can view Containers and their properties. All users are assigned the Container Viewer role on the Site folder.

Library Creators can view Container properties and can create Libraries at the Site or Container level.

These roles can be accessed without being in **Administration Mode**.

Glossary

access roles

Oracle Content DB security is based on access roles, which specify what kind of access a user has to files, folders, Libraries, Containers, and links in Oracle Content DB. Each role is made up of a set of *permissions*. A permission represents the ability to perform a specific Oracle Content DB action or operation.

Administration Mode

Oracle Content DB Administration Mode provides access to application administration functions, such as allocating quota and assigning roles.

application administration

Oracle Content DB application administration involves managing users, quota, Libraries, security, categories, and content.

approvers

An approver, in a workflow request, is a specified user who must either approve or reject the request.

archive

The Oracle Content DB Site contains an archive folder. When a file or folder is deleted, the item is moved to the Trash folder of the Library containing the file or folder. When an item is deleted from the Trash folder, the Trash folder is emptied, and the item is moved to the archive folder. Depending on Site configuration, items in the archive folder may be automatically deleted after a specified period of time. Files and folders in the archive folder can be recovered and restored by the Site's Content Administrators.

category

A category is a unit of information by which files and folders may be classified. In Oracle Content DB, users associate metadata with a file or folder by assigning one or more categories to it. Users can use categories to create intelligent searches for files and folders. Categories may be divided into subcategories, and may have one or more category attributes. Categories are created and configured for the Site by Category Administrators.

category attributes

A category attribute is additional information added to define a category in Oracle Content DB.

check-out/check-in

One mechanism for creating a new version of a file is check-out/check-in. Each file can be checked out by only one user at a time, enforced by a locking mechanism. Checking in a file creates a new version from the working copy, and then destroys the working copy. The new version becomes the latest version of the file, and like any document version, is immutable and thus cannot be further updated. The lock acquired at check-out is released, allowing other users to check out the document.

Container

A Container is a special type of Oracle Content DB folder. The Container provides users and administrators with greater flexibility in organizing files and folders. For instance, Containers could be used to organize the Site by a company's business divisions or office locations. Only Libraries and Containers can be stored in a Container.

Library

A Library is a special type of folder in Oracle Content DB. Unlike Containers and regular folders, each Library has a Trash Folder and an allocated quota of disk space.

metadata

Data that provides information about, or documentation of, other data managed within an application or environment. In Oracle Content DB, users associate metadata with a file or folder by assigning one or more categories to the file or folder.

Oracle Workflow

Oracle Workflow is a system that supports business process definition, automation, and integration.

Personal Library

A Personal Library is a Library that is set up for, and managed by, a single user. Personal Libraries may or may not be available, depending on whether or not the User Administrator has enabled Personal Libraries in your Oracle Content DB Site.

quota

Quota is the amount of disk space allocated for a Library.

Site

The Oracle Content DB Site is an organizational entity that is used to manage settings for all Oracle Content DB users. The Site has an allocated quota that specifies the amount of content (in MB, GB, or TB) that can be stored in the Site.

system administration

Oracle Content DB system administration involves the following tasks:

- Planning for Oracle Content DB deployment
- Installing and configuring Oracle Content DB
- Optionally customizing their Oracle Content DB deployment by enabling an antivirus solution, BFILE archiving or aging, and other options
- Managing the Oracle Content DB domain, nodes, services, and servers
- Performing system tuning and troubleshooting
- Managing the Oracle Content DB Site

- Managing custom BPEL workflows

UTF-8

A character encoding format used to represent a sequence of 16-bit Unicode characters with an equivalent sequence of 8-bit characters, no one of which is zero. This sequence of characters can be represented using an ordinary C language string. If your operating system does not support UTF-8, you can enter another Distributed Authoring and Versioning (DAV) character encoding format in user preferences.

version-control

A version controlled file has a version history, consisting of a series of versions. Each version has both content and metadata for the document. Updating the document's content or metadata causes a new version to be created. In general, once a version is created it is immutable. If versioning is enabled for a folder or Library, and Manual Versioning is selected for the Versioning Model, users can create a version-controlled document only through explicit check-out and check-in operations. If versioning is enabled for a folder or Library, and Automatic Versioning is selected for the Versioning Model, updates to a file's content or category information will result in the automatic creation of a new version.

version history

Information about the saved versions of a file. Accessible from the Version Properties window for a file, the version history displays the working copy of the file and a table of the file's saved versions.

Web Distributed Authoring and Versioning (WebDAV)

WebDAV is the Internet Engineering Task Force (IETF) standard for collaborative authoring on the World Wide Web. It consists of a set of extensions to the Hypertext Transfer Protocol (HTTP). These extensions facilitate collaborative editing and file management among users located remotely from each other on the Internet.

workflow processes

A workflow process defines a series of events that must be achieved before a certain workflow-enabled action takes place. There are two kinds of workflow processes:

- Parallel: In a parallel review workflow process, all approvers review the submitted files or request at the same time. The number of approvals or rejections for a completed approval or rejection is set in the Workflow tab of the folder or Library Properties window.

- Serial: In a serial review workflow process, each approver reviews the submitted files or request in turn, one approver at a time. All reviewers must approve the request to complete the approval process; a single rejection ends the review process, and results in the request being rejected.

working copy

A working copy is the editable copy of a file. When a file is checked out, a server-resident working copy is created as a copy of the latest version. Similar to a file version, the working copy has both content and metadata for the document, and can be overwritten by that user any number of times. The working copy is visible only to the user who checked out the document. The user who checked out the document may update the working copy.

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