

Content Server Enterprise Search
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INTRODUCTION

OVERVIEW

This section covers the following topics:

- ❖ [About Content Server](#) (page 1-1)
- ❖ [What's New](#) (page 1-2)
- ❖ [About This Guide](#) (page 1-2)

ABOUT CONTENT SERVER

Oracle Content Server supports improved system integration and scalability for high volumes of content. This is accomplished by providing the capability to navigate seamlessly between multiple Content Servers and search distributed content. The servers may be locally placed or remotely positioned in diverse geographic sites. Either way, the scalable flexibility of Content Server enables users to expand their search capabilities.

A typical use for Content Server is when individual departments in a large organization each have their own Content Server instance but need to share information. For example, if a consumer from one department requires information from another department to create a year-end report, that user can search for the specific documents that are needed across several Content Servers. The system administrator determines the number of searchable Content Server instances that are available to each consumer.



Important: It is important to use the same search engine on all systems when using Content Server unless your users only need metadata search. Full-text search varies depending on the search engine used.

WHAT'S NEW

New in version 8.0 is the ability to map fields on different Content Server instances for the purpose of enterprise searching. For example, you may need to map a field *xInternalNote* on one system to *xNote* on another system. You can define a map for a specific search engine or across search engines. To do this, use a custom component to edit the resultset in the `<install_dir>/shared/config/resources/searchindexerrules.htm` table.

The following Field map exists in core. To define a map for a specific search engine, use `(SearchEngine)fieldName`. Otherwise, to define a map across search engines, just use `fieldName`.

```
<@table SearchFieldAliasName@>
<table border=1>
<tr>
<td>sfanAlias</td> <td>sfanFieldName</td>
</tr>
<tr>
<td>(DATABASE) dID</td> <td>Revisions.dID</td>
</tr>
<tr>
<td>(DATABASEFULLTEXT) dID</td> <td>DocMeta.dID</td>
</tr>
</table>
<@end@>
```

ABOUT THIS GUIDE

This administration and user guide provides all information required to activate and configure the Content Server software to support expanded search capabilities across multiple networked servers and their distributed content. This guide also provides user instructions for each product function. The information contained in this document is subject to change as the product technology evolves.

Intended Audience





This administration and user guide is intended for two primary types of users: consumers who need to find, view and print content items and system administration individuals who are responsible for setting up and maintaining Content Server. In addition, this manual will be useful for database administrators who maintain the integrity of the document information stored in the Content Servers. This document assumes that you are familiar with Universal Content Management products and the architecture of the Content Server.

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 will always appear after the end of a directory name.

❖ Notes, technical tips, important notices, and cautions use these conventions:

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

Chapter Overviews

Chapter 2 (Activating Content Server)

This chapter provides instructions to activate, setup and configure the applicable software to enable the use of Content Server. It also includes instructions for configuring outgoing providers on master and proxy instances, announcing content changes made in a proxied Content Server instance, and establishing the number of searchable instances and their user availability.

Chapter 3 (Using Content Server)

This chapter provides instructions to use Content Server features. These include searching for files using simple, detailed and full-text criteria. It also includes instructions for performing a quick search and viewing the search results for single or multiple Content Server instances.

ACTIVATING CONTENT SERVER

OVERVIEW

This section covers the following topics:

- ❖ [Content Server Overview](#) (page 2-1)
- ❖ [Pre-Activation Tasks and Considerations](#) (page 2-6)
- ❖ [Setting Up Content Server](#) (page 2-8)
- ❖ [Performing Maintenance Functions](#) (page 2-14)

CONTENT SERVER OVERVIEW

Content Server enables users to perform a metadata or full-text search across multiple Content Server instances and have the results displayed on a single results page. Users define their search criteria and select the Content Server instances to be included in the search. Results are returned using the same format as the basic Content Server Query Results page but the found content items are grouped according to the specific instances in which they currently reside.

Content Server supports these expanded search capabilities through the use of system administrator-defined outgoing providers. Properly configured providers for the master and all proxied servers is critical to ensuring proper communication within the system. The defined outgoing providers are required to enable distributed search capabilities as well as to synchronize inter-server notification of system changes pertaining to both content items and users.

Understanding Master-to-Master Proxied Servers

Master/proxied server configurations are necessary when you are setting up a Content Server environment in combination with Content Server. Using the master/proxied server configuration, a number of Content Servers can be set up as logically separate entities, but still be able to search the content databases of all the Content Server instances with a single search query.

A master-to-master proxied server configuration designates one server as the master and one or more others as proxied server(s). Proxied servers are separate Content Server instances that have their own content database, Web Layout, and Vault but share the main communication interface and page delivery engine with the master server. In combination with Content Server, this enables a master server to search across multiple master servers, while the proxied server still has the ability to function as a master and control its own proxied servers.

Terminology

Term	Definition
Metadata	Information that you enter in the Check In Form to describe a file. These metadata fields are, typically, found on the Content Information page, Info Update Form, and the Check In Form, such as: File Type, Title, Author, Security Group, and so forth.
Master instance	A master server, or a <i>controlling instance</i> , is usually configured as an outgoing provider on the Provider page. However you can also configure a master as a proxied instance.
Proxied instance	A proxied server, or a <i>controlled instance</i> , is usually configured as an outgoing provider on the Provider page. However, you can also configure a proxied instance as a master instance.

Understanding Outgoing Providers

A provider is an Application Programming Interface (API) that establishes a connection to outside entities that includes other Content Server instances. The Oracle system allows you to create several types of providers. However, you will only need to add outgoing providers to fully activate and enable Content Server in your system. The outgoing providers defined for the master and proxied servers allow communication between all Content Server instances. Outgoing providers can also optionally be configured to provide inter-server notification of user or search collection changes.



Note: In master-to-master proxied server configurations, using appropriately defined outgoing providers, a server can act as both the master and proxied instance. For example, a proxied master server can function as a proxy to another master but can also control its own proxied servers.

Multi-Instance Intercommunication

One of the functions of an outgoing provider is to enable two or more instances of Content Server to communicate with each other. This inter-instance communication is necessary to support distributed search capabilities. Both the master and proxied server(s) have outgoing providers defined. The master instance must have an outgoing provider defined for each proxied instance that requires a connection to enable content database searches. Similarly, each proxied instance must have an outgoing provider defined for the master instance.

Change Notification Synchronization

An alert option called “Notify Target” is used to inform master instances when changes are made to the Content Information page. This option is applicable only to the outgoing provider type, and you select it on the Creating Outgoing Providers page. You can assign this option either initially during the Content Server implementation, or at any time when adding additional or updating existing outgoing providers. The “target” to receive the notification is typically the master Content Server instance.

The purpose of the Notify Target option is to ensure that proxied instances notify the master instance when user information or content item information changes occur. This ensures that the information between master and proxied instances is automatically synchronized and remains consistent. With properly configured outgoing providers, the master instance monitors each proxied instance for change notifications.

The Notify Target option offers two types of subjects for change notifications:

❖ **Users**

When enabled, the Users option ensures that the proxied content instance associated with this outgoing provider will notify the corresponding master instance when user information changes.

❖ **Released Documents**

When enabled, the Released Documents option ensures that the proxied content instance associated with this outgoing provider will notify the corresponding master instance when content item information changes.

The Notify Target option proactively notifies the master instance of selected changes and automatically update the applicable information. This means that caching is not used. If, for example, the Released Documents option is enabled, then any time the search collection changes, the master instance is notified about the change. Likewise, enabling the Users option means that new or updated user information is proactively updated. By default, these notification actions override the search and user information caching functions.



Important: It is assumed that most customers will want to enable the Notify Target option and one or both of the available subject options. However, if you are trying to streamline your system's performance, you may not want this option enabled. Conversely, if you continually need the absolute current document versions or user information that is available, you will want these options enabled.

User Interface Functions

With very few exceptions, the basic functions of Content Server are similar to the Content Server core search functionality. The Content Server pages and navigation procedures are accessed and used the same way as the corresponding Content Server features. The Oracle system distinguishes four types of users and Content Server functionality is based on these user types as follows:

❖ **Administrator / sub-administrator functions:**

Administrators are individuals who set up, maintain, and modify the configuration of the content management system and its user logins. Administrators can also set up sub-level administrators to help manage the system by performing a subset of administrative tasks. The sub-administrators maintain a portion of the system.

Specific Oracle system navigation menu links and their corresponding pages are only visible to those who have administration privileges which enable the users to perform

various system management and maintenance tasks. In Content Server, these tasks include:

- Adding applicable virtual directories
- Configuring outgoing providers
- Setting the number of searchable instances available to consumers
- Setting up master/proxy content change notifications
- Monitoring the Outgoing Providers

For more detailed information about the applicable administrator and sub-administrator functions, refer to [Setting Up Content Server](#) (page 2-8) and [Performing Maintenance Functions](#) (page 2-14).

❖ **Consumer / contributor functions:**

Consumers are users who access the Content Server through their web browser to search, find, and view files. They can only access files that they are permitted to see, based on their login credentials. Consumers cannot check new content into Oracle. Contributors are users who—like consumers—can find, view, and print files, but can also check new content into Oracle or revise existing content.

The navigation menu links available to consumers and contributors depends on their individual and/or group privileges. In Content Server, consumer and contributor functions include searching one or more Content Server instances and displaying results for individual or multiple instances. For more detailed information about the applicable consumer and contributor functions, refer to [Searching for Files Using Content Server](#) (page 3-1) and [Viewing Content Server Results](#) (page 3-5).

Understanding Security

It is essential that you understand the security model implemented for your company's installation of Content Server. A thorough knowledge of each Content Server instance security model in the network is crucial when you set search access permissions for Content Server based on roles and accounts. It is particularly important that you are familiar with how the security groups, roles, users, and accounts are currently used and how they have been established for each Content Server instance.

You will need to have precise information available about the roles and accounts for each Content Server instance when you determine the number of searchable instances that are available to each user. You will need to know the specific names of roles and accounts. You will be asked to enter this information into the Roles field and the Account Filter field when you edit the applicable outgoing provider to establish the availability of searchable instances to consumers.

For more detailed information about setting the available search parameters, refer to [Setting Availability of Searchable Instances](#) (page 2-14). For more detailed information about designing, implementing, and configuring security models, refer to the *Content Server System Administration Guide* and the *Content Server Infrastructure, Integration, and Security Guide*.

PRE-ACTIVATION TASKS AND CONSIDERATIONS

There are a few tasks and considerations that need to be considered before setting up Content Server and configuring the required outgoing providers. The tasks and considerations below are related to properly setting up your servers and installing Content Server. Make sure that you read, understand, and comply with each of them before setting up Content Server.

- ❖ Install two or more master Content Servers, all of the same version. (All servers in the network that are designated to be included in the distributed search activities must have a licensed Content Server installed.)
- ❖ Each Content Server instance must have a unique relative web root name.



Important: If the Content Server instances in your network all use the same relative web root directory (i.e. “stellent”), then you will need to rename the relative web root directories on all but one Content Server instance (the master instance). The relative web root directory names must be changed in the configuration file and on the corresponding web servers and the new names must be unique (such as stellent1, stellent2, etc.). For detailed information about installation requirements for the Content Server software, refer to the *Content Server Installation Guide for Microsoft Windows* or the *Content Server Installation Guide for UNIX*.



Note: If your server configuration already consists of a master instance of the Content Server and one or more installed proxied Content Server instances, you will not need to change the relative web root directory name in any of your Content Server instances.

- ❖ Each server must have access to the other server(s) in the network that are selected to be included in the distributed search activities. Also, the server that will be searching the content databases (the designated master server) must have access to the file system of the server(s) that will be providing the data (each proxied server).

There are several methods you can use to accomplish this. Implement the applicable method depending on your Content Server configuration.

If you are using a master/proxy configuration:

- **Method 1 — Windows and UNIX:**
Make the Web Layout directory (*weblayout*) of the proxied server accessible to the master Content Server. (This is the most frequently used approach.)
- **Method 2— Windows:**
Create a user account on the proxied server(s) that has access to the IIS services and the weblayout folder of the master server.
- **Method 3— Windows:**
Enable the guest account on the proxied server(s) as follows:
 1. Select **Start—Settings—Control Panel—Administrative Tools—Computer Management—System Properties**.
 2. Open the **Local Users and Groups** directory.
 3. Open the **Users** directory.
 4. Right-click on **Guest** and select **Properties**. Deselect the checkbox for **Account is Disabled** and click **OK**.

If you are using a master/master configuration:

- **Windows and UNIX:**
Make the Web Layout directory (*weblayout*) of the proxied server accessible to the master Content Server. (This is the most frequently used approach.)
- ❖ The following information will be necessary to create and add outgoing providers for the master and proxied server(s):
- The **server host name** (for example, StellentMaster or StellentProxy)
 - The complete **network IP address** (for example, 61.45.14.104) or server host name of each Content Server instance
 - The **HTTP address** (for example, intradoc:90)
 - The correct **server port** on which each outgoing provider communicates with other entities (for example, 4444)
 - The correct **instance name** of each Content Server instance
 - The **relative web root** name of each Content Server instance which is the shortcut name to enter into a browser to access the web page (for example, /stellent_2/)

SETTING UP CONTENT SERVER

The following list summarizes the steps required to set up Content Server:

- ❖ Create a new virtual directory to the master server's web server for the proxied server. This enables the master server to browse to the Web Layout directory of the proxied server. Refer to [Adding a New Virtual Directory](#) (page 2-8).
- ❖ Configure an outgoing provider on the master server for each applicable proxied server in the network. This facilitates communication between the master and proxied servers, allows the master server to search the content database of the proxied servers, and enables the master server to receive notifications from the proxied servers about changes in user or content information. Refer to [Configuring a Provider on the Master Instance](#) (page 2-10).
- ❖ Configure an outgoing provider on each applicable proxied server in the network for the master server. This facilitates communication between the master and proxied servers, allows the content database of the proxied servers to be searched by the master server, and enables the proxied servers to send notifications about changes in user or content information to the master server. Refer to [Configuring a Provider on a Proxy Instance](#) (page 2-12).
- ❖ Enable the configuration parameter in the master instance that permits distributed search capabilities across the network of Content Servers. Refer to [Enabling Distributed Search Capabilities](#) (page 2-13).
- ❖ Refresh the Content Server portal pages to reflect the changes related to activating Content Server. Refer to [Updating the Master Instance Portal Page](#) (page 2-14).

Adding a New Virtual Directory



Important: As mentioned earlier in the [Pre-Activation Tasks and Considerations](#) section, each server in the network must have a unique relative web root name. This must be verified before activating Content Server.

Add a new virtual directory for the proxied server to the master server's web server. The relative web root for the new virtual directory must be the same as the relative web root of the proxied server, and it must point to the *weblayout* directory of the proxied server.



Important: If you are using two Content Server master instances, you will not be able to select the second master's *weblayout* directory in step 5. In this case, you must:

1. Ensure that the second master has a unique instance name and a different relative web root than the first master.
2. Ensure that the second master's *weblayout* directory is shared. If you are using IIS, the new virtual directory for the second master must point to its *weblayout* directory via a UNC path (for example, \\<2ndmaster_machine_name>\weblayout).

To add a new virtual directory:

1. Open the Internet Information Services (IIS) web server on the master server:
Start—Control Panel—Administrative Tools—Internet Information Services.
2. Double-click the server.
3. Access the **Virtual Directory Creation Wizard**:
 - a. Open the Web Sites directory.
 - b. Right-click on **Default Web Site**.
 - c. Select **New**.
 - d. Select **Virtual Directory** and click **Next**.
4. In the **Alias** field, type the name of the relative web root of the proxied server (the Content Server to be searched). This must exactly match the virtual directory (relative web root) of the proxied server (the machine you are trying to connect to). This Alias must be unique.

For example: If the proxy server has a relative web root of StellentP and the master server has a relative root of StellentM, you would type StellentP into the Alias field.

Click **Next**.
5. Enter the path to the *weblayout* directory on the proxied server. (If you mapped a drive to the proxy server you can browse to the *weblayout* directory on that mapped drive.)

Click **Next**.
6. Select **Next** to accept the defaults for the Access Permissions window.
7. Select **Finish** to complete the creation process.
8. Edit the new virtual directory:
 - a. Double-click the **Default Web Site**.

- b. Right-click the new virtual directory (in this case, StellentM) and select **Properties**.
- c. Select the **Documents** tab. Remove *Default.htm*, *Default.asp*, *Index.htm*, and *iisstart.asp* from the list.
- d. Click the **Add** button and add *portal.htm*.
- e. Click **Apply** and then **OK**.
- f. Restart the IIS service.

Configuring a Provider on the Master Instance

To communicate with the proxied servers and to receive notification of changes, you need to configure an outgoing provider on the master instance for each applicable proxied Content Server instance in the network.



Note: To successfully implement Content Server in a network with multiple servers configured with independent Content Servers, a master/proxied environmental architecture must exist (i.e. one designated master server and one or more additional configured proxied servers). During the initial installation of a new Content Server, it can be installed as either a master or a proxied instance.

If you initially set up your servers to accommodate Content Server, then your network already has a designated master server. Excluding the master instance of the Content Server, if all additional Content Server instances in your network were installed as proxied Content Server instances, this outgoing provider already exists for each applicable Content Server instance.

Use the following procedure to configure an outgoing provider on the master instance:

1. Browse to:
Content Server/*<instance>***/Utilities/SystemProperties.**
2. Select the **Options** tab, enable the **Enable Content Server on standard query pages** option and click **OK**.
3. Open a browser window and access the master Content Server's **Administration** page. Click the **Providers** link.
4. In the **Create a New Provider** section, locate the **outgoing** provider type and select **Add** from the **Action** column.

5. On the **Add Outgoing Provider** page, enter applicable information pertaining to the proxied server in the following fields:
 - **Provider Name** (The name of this provider, which will become a subdirectory in the <install_dir>/data/providers/ directory. For example, StellentMaster.)
 - **Provider Description** (A user-friendly description of the provider. For example, Provider allows for searches on proxy from master.)
 - **Server Host Name** (The server host name of the proxy instance. This entry can also be an IP address. For example, StellentProxy.)
 - **HTTP Server Address** (The HTTP address of the proxy instance. For example, StellentProxy.)



Note: Make sure to enter the correct port that the proxied Content Server runs on as well as the instance name of the proxy instance and the relative web root that was created earlier within IIS. For example, /StellentP/. (Refer to [Adding a New Virtual Directory](#) (page 2-8).

- **Server Port** (The port on which the provider will communicate with the proxy instance. For example, 4444.)
 - **Instance Name** (The instance name of the proxy instance. For example, StellentProxy.)
 - **Relative Web Root** (The shortcut to enter in a browser for the web page. For example, /StellentP/.)
6. In the **Server Options** section, enable the **Proxied** option.
 7. In the **Search Options** section, enable the **Content Serverable** option.
 8. Click **Add**.
 9. Restart the master Content Server to activate these changes.
 10. When the master Content Server comes back up, return to the **Administration** page, click the **Providers** link, and verify that the connection status is good.

Configuring a Provider on a Proxy Instance

To communicate with the master server and to provide notification of changes, you need to configure an outgoing provider on each proxied instance for the master Content Server instance in the network.



Note: To successfully implement Content Server in a network with multiple servers configured with independent Content Servers, a master/proxied environmental architecture must exist (i.e. one designated master server and one or more additional configured proxied servers). During the initial installation of a new Content Server, it can be installed as either a master or a proxied instance.

If you initially set up your servers to accommodate Content Server, then your network already has a designated master server. Excluding the master instance of the Content Server, if all additional Content Server instances in your network were installed as proxied Content Server instances, this outgoing provider already exists for each applicable Content Server instance.

Use the following procedure to configure an outgoing provider on each proxy instance:

1. Open a browser window and access the proxy Content Server's **Administration** page. Click the **Providers** link
2. In the **Create a New Provider** section, locate the **outgoing** provider type and select **Add** from the **Action** column.
3. On the **Add Outgoing Provider** page, enter applicable information pertaining to the master server in the following fields:
 - **Provider Name** (The name of this provider, which will become a subdirectory in the `<install_dir>/data/providers/` directory. For example, StellentProxy.)
 - **Provider Description** (A user-friendly description of the provider. For example, Notifies the master of changes in users/docs.)
 - **Server Host Name** (The server host name of the master instance. This entry can also be an IP address. For example, StellentMaster.)
 - **HTTP Server Address** (The HTTP address of the master instance. For example, StellentMaster.)



Note: Make sure to enter the correct port that the master Content Server runs on as well as the instance name of the master instance and the correct relative web root. For example, /StellentM/.

- **Server Port** (The port on which the provider will communicate with the proxy instance. For example, 4444.)
 - **Instance Name** (The instance name of the master instance. For example, StellentMaster.)
 - **Relative Web Root** (The shortcut to enter in a browser for the web page. For example, /StellentM/.)
4. In the **Server Options** section, enable the **Notify Target, Users, and/or Released Documents** options.



Note: Although the Notify Target option is optional, it is necessary to enable this option (and one or both subject options) if you want the proxied servers in the network to proactively forward notifications to the master instance when changes are made to user information and/or content item information. For more information about these provider options, refer to [Understanding Outgoing Providers](#) (page 2-3).

5. Click **Add**.
6. Restart the proxied Content Server to activate these changes.
7. When the proxied Content Server comes back up, return to the **Administration** page, click the **Providers** link, and verify that the connection status is good.

Enabling Distributed Search Capabilities

Use the following procedure to enable the distributed search capabilities on the master Content Server instance:

1. In the master Content Server instance, select the **Enable Content Server on standard query pages** option using one of the following methods:
 - **Method 1 — Windows:**
Select **Start—All Programs—Content Server—<instance>—Utilities—System Properties**. Select the check box on the Options tab and click **OK**.
 - **Method 2— Windows and UNIX:**
From the Content Server **Administration** page, click **Admin Server**, click the **<instance_name>** button, and click **General Configuration** in the left navigation bar. Select the check box and click **Save**.
2. Restart the Content Server.

Updating the Master Instance Portal Page

After Content Server has been activated, the standard Content Server portal page still displays. It is necessary to update the Portal page in the Web Layout Editor on the master Content Server instance to display the user-selectable searchable instances. Setting up the outgoing providers ensures that all of the proxied servers can be accessed.

Update the Portal page on the master Content Server instance using one of the following methods:

❖ **Method 1 — Windows:**

1. To start the Web Layout Editor on the master server, select **Start—All Programs—Content Server—<instance>—Applications—Web Layout Editor**
2. In the **Options** menu select **Update Portal**.
3. Click **OK** to complete the rebuild.

❖ **Method 2— Windows and UNIX:**

1. Click the **Web Layout Editor** from the **Administration** page
2. Select **Options—Update Portal** and click **OK**

PERFORMING MAINTENANCE FUNCTIONS

In addition to setting up and activating Content Server, administrator tasks also involve maintaining and managing Content Server and Content Server. This section provides the procedures used for the applicable Content Server administrative tasks.

Setting Availability of Searchable Instances

The system administrator is responsible for determining the number of searchable instances that can be made available to each consumer. Use the following procedure to set these constraints:

1. Navigate to the **Providers** page from the **Administration** page.
2. Click the **Info** link for the instance to include in Content Server.
3. Click **Edit**.
4. Select **Content Serverable**.

5. To limit access to those users who have particular roles and/or accounts:
 - Enter roles in the Required Roles field.
 - Enter accounts in the Account Filter field.



Important: A thorough knowledge of each Content Server instance security model in the network is crucial when you set search access permissions for Content Server based on roles and accounts. It is particularly important that you are familiar with how the security groups, roles, users, and accounts are currently used and how they have been established for each Content Server instance. Be sure to carefully consider the defined roles and accounts in each instance to avoid inadvertently allowing access to users that should not be given view or print privileges.

6. Click **Update**.
7. Restart all re-configured Content Servers.

Notifying the Master Instance of Changes

The Notify Target option and corresponding subject options can be enabled when the outgoing provider is configured or at any other time. If you did not set these options when you configured the outgoing provider, use the following procedure to alert the master Content Server instance when changes are made to content or users in a proxied instance:

1. In the proxied instance, go to the **Providers** page.
2. Select the **Info** link for the incoming provider that connects to the primary server.
3. Click **Edit**.
4. enable the **Notify Target**, **Users**, and/or **Released Documents** options
5. Click **Update**.
6. Restart all re-configured Content Servers.



Note: Although the Notify Target option is optional, it is necessary to enable this option (and one or both subject options) if you want the proxied servers in the network to proactively forward notifications to the master instance when changes are made to user information and/or content item information. For more information about these provider options, refer to [Understanding Outgoing Providers](#) (page 2-3).

Monitoring Outgoing Providers

Administrators can monitor the outgoing providers using the Providers link on the Content Server Administration page. This link opens the Providers page that displays a list of currently defined outgoing providers. For each defined provider in the list, the Providers page also tabulates the provider type, connection status, and the date of the last recorded activity event. Users can also click the Test link to retry the connection and refresh the field information. Or, users can click the Info link to access the corresponding Provider Information page to review and edit provider information.

For comprehensive information about Oracle providers, provider pages and detailed field descriptions, refer to the About Providers section in the *Content Server Managing System Settings and Processes* document.

USING CONTENT SERVER

OVERVIEW

This chapter covers the following topics:

- ❖ [Searching for Files Using Content Server](#) (page 3-1)
- ❖ [Viewing Content Server Results](#) (page 3-5)

SEARCHING FOR FILES USING CONTENT SERVER

With very few exceptions, the basic functions of Content Server are similar to the Content Server core search functionality. The most noticeable differences are the Search and the Search Results pages. For more information on instances and creating searchable instances, refer to [Understanding Outgoing Providers](#) (page 2-3) and [Setting Up Content Server](#) (page 2-8).



Important: It is important to use the same search engine on all systems when using Content Server unless your users only need metadata search. Full-text search varies depending on the search engine used.

About Searching for Files

Content Server enables you to perform simple, detailed, and full-text searches over predefined, multiple servers. For example, departments in a large organization using separate Content Server instances may find this functionality especially useful. In this case, when a consumer from one department requires information from another

department to create a year-end report, they can access the Search page with Content Server capability and enter the metadata (content name, type, security group, author, and so forth) and select the searchable instances relating to the specific information they need.

Searches on multiple instances can be performed from the Home page for either simple or global searches. Refer to [Home Page with Multiple Instances](#) (page 3-2). Or, users can perform searches from the Search page for more detailed or full-text searches. Refer to [Search Page](#) (page 3-3).

Home Page with Multiple Instances

The Home page displays a Search page with a limited number of file information fields. The Search page, when accessed from the Home page, is typically used for quick, global searches. However, with Content Server activated, the **Instances** option is also available to enable multiple instance search capabilities.

For more information on instances and creating searchable instances, refer to [Understanding Outgoing Providers](#) (page 2-3).

The screenshot shows a search interface titled "Search". Under the "Instances" section, there are two checkboxes: "Instance_on_test14" (checked) and "test14_sybase" (unchecked). Below this are several input fields: "Title", "Content ID", "Release Date From" and "To" (date range), and "Full Text". At the bottom, there is a "Sort By:" section with a dropdown menu set to "Title", another dropdown set to "Ascending", and a "Search" button.

Figure 3-1 Simple Search Page on the Home Page

Search Page

The complete Search page for Content Server is similar to the core product with enhanced content information search fields, full-text search capability, and the addition of the **Searchable Instances** option. To access this page, click the **Search** icon on the Main toolbar.

For more information on instances and creating searchable instances, refer to [Understanding Outgoing Providers](#) (page 2-3).

The screenshot shows the 'Search' page interface. At the top, there is a 'Search' section with a 'Search' button and a 'Clear' button. Below this is a 'Full-text Search' field with the instruction 'Enter words or phrases separated by commas'. The middle section, 'Searchable Instances', contains several search criteria: Document Name, Document Title, Document Type, Security Group, Author, Release Date (From/To), Expiration Date (From/To), and Comments. Each criterion has a 'Substring' dropdown and an input field. The 'Searchable Instances' section has two checkboxes: 'Instance_on_bobbitest' (checked) and 'Instance_on_bobbitest2' (unchecked). The bottom section, 'Results Options', includes 'Documents per page' set to 25 and 'Sort By' set to 'Release Date' with a 'Descending' dropdown.

Figure 3-2 Complete Search Page for Content Server

Performing a Quick Search

To perform a quick search, do the following:

1. Click **Home** on the Main toolbar.
The Search page is displayed.
2. Complete one or all of the file information (metadata) fields. If no file information fields are completed, all records are returned.
3. Select as many of the searchable **Instances** check boxes as needed.
4. Click **Search**.
The Search Results page is displayed.

Performing a Detailed Search

To perform a more detailed or full-text search, do the following:

1. Click **Search** on the Main toolbar.
The Search page is displayed.
2. Complete as many file information (metadata) fields as necessary on the Search page that describe the documents you want to find.
The more information you can provide, the narrower your search.
3. Select one or more of the **Searchable Instances** check boxes.
4. Click **Search**.
The search results table is displayed; multiple search results tables are displayed if you chose more than one instance that matches your query.
5. Click the **File Link** (file name) in the Description field to view the document.
6. Click **Search** to perform another search.

VIEWING CONTENT SERVER RESULTS

When using Content Server, the Search Results page may differ slightly from the standard Content Server Search Results page. The number of instances you choose for your search on either the Home page or the Search page determines the number of search results tables displayed. For each instance that matches your query, a table with a maximum of four documents per table is displayed. This is the system default because it helps to keep the Search Results page to a manageable size.





Search Results Page

The Search Results page in Content Server displays one table per instance for results matching the query. Each table contains the first several matches located for that instance. Refer to [Multiple-Instance Search Results Table](#) (page 3-6). The hyperlink labeled **More**, located in the upper-right corner of each table, is used to view the entire list of results associated with an individual search instance. Refer to [Single-Instance Search Results Table](#) (page 3-6).

Multiple-Instance Search Results Table

The number of results found, in the upper-left corner, matching the query equals the total number of results for *all* instances searched.

Found 58 results matching the query. Save

Instance: Instance_on_test14		Results: 50	More	
	Description	Rev.	Info	
	000008 run 1 - example 8 (fm)	1	i	
	000046 run 1 - example 46 (pub)	1	i	
	000022 run 1 - example 22 (gif)	1	i	
	000023 run 1 - example 23 (pg)	1	i	





Instance: test14_sybase		Results: 8	More	
	Description	Rev.	Info	
	Wk4file File 7 4/20	1	i	
	xl6 Excel file 6 4/20	1	i	
	xlfile4 Excel file 4 4/20 Monday	1	i	
	xlfile5 Excel File 5 4/20	1	i	

Figure 3-3 Multiple-Instance Search Results Table

Single-Instance Search Results Table

In Content Server, as in the Content Server core product, when you perform a search on a single searchable instance, all the results that relate to your search query are displayed. When you select more than one searchable instance, the Search Results page displays multiple search results tables with a limit of four results per table. However, when there are more than four documents for an individual instance in your search, a link (labeled **More**) is available at the top of each table which enables you to look at the additional documents that match your query.

Figure 3-3 illustrates the search results table that is displayed when using the *More* hyperlink. This example displays additional results for the *Instance_on_test14* query.

List Navigation: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [\(Next\)](#)

Found 50 results matching the query.

Displaying matches 1-8.

	Description	Rev.	Info
	000008 run 1 - example 8 (fm)	1	
	000046 run 1 - example 46 (pub)	1	
	000022 run 1 - example 22 (gif)	1	
	000023 run 1 - example 23 (jpg)	1	
	000024 run 1 - example 24 (txt)	1	
	000025 run 1 - example 25 (123)	1	
	000026 run 1 - example 26 (wp)	1	
	000027 run 1 - example 27 (wp)	1	

Figure 3-4 More Hyperlink Search Results Table

Viewing All Results for One Instance

Typically, when you perform a search using Content Server you will be selecting more than one server/instance and the search will result in multiple search results tables. Because each table displayed is limited to four results, the hyperlink *More* is available, where applicable, to enable you to view all the matches associated with your search query.

To view the additional documents relating to an individual search instance, perform these tasks:

1. On the Search Results page, locate the search results table for the instance you would like to view.

2. Click **More**.

The Search Results table displays only the results for that instance.

3. Perform one of these actions:

- Click content's name hyperlink or the content's type icon, to view the document.
- Click the Info field to view the Content Information page.
- Click **Rev.** number to view the document's **Revision history for xxx** page.
- Click **Back** to return to the Search Results page.

4. Click **More** on any additional instance's search results table to view all of its associated documents.



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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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