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Content Folios Installation and Administration Guide
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Contributing Authors: Bruce Silver
Contributors: Aaron Briel, Peter Walters

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Chapter

1

INTRODUCTION

OVERVIEW

Content Folios provides a quick and effective way to assemble, track, and access logical groupings of multiple content items from within the secure environment of Content Server. For example, all items relevant to an upcoming brochure, such as images, logos, legal disclosures, and ad copy, can be assembled and sent through a workflow process. Once approved, all associated content can be downloaded and sent for print. Or perhaps a new project requires a virtual place to assemble all relevant content items in a particular hierarchy, whenever they are checked in, with restricted access to particular areas of the hierarchy. Or a video may need to be associated and tracked with release waivers and narration text. All this can be done with Content Folios.

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

This chapter contains the following topics:

- About This Guide (page 1-2)
- Component Features (page 1-3)
- Compatibility with Content Server (page 1-4)
- Pre-Installation Considerations (page 1-4)
- Installation Requirements (page 1-5)
- Basic Installation Procedure (page 1-6)
- Support (page 1-6)

ABOUT THIS GUIDE

This guide provides instructions for installing and administering Content Folios on an instance of Content Server 10*g*R3. Chapter 1 provides an overview of the product and installation procedure, as well as pre-installation considerations and installation requirements. Chapter 2 provides detailed installation and removal instructions, and Chapter 3 provides information for administering templates and other aspects of Folios.

This sections contains the following topics:

- Audience (page 1-2)
- Conventions (page 1-2)

Audience

This guide is for system administrators of Content Server with the responsibility of installing and maintaining Content Server and managing its data.

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.

COMPONENT FEATURES

Content Folios adds the following functionality to Content Server.

- The ability to organize content into a simple, flat folio structure
- The ability to organize content into an advanced hierarchical folio structure
- The ability to create pre-structured templates for selection when creating folios
- The ability to modify folio structure dynamically
- The ability to lock folio structure to prevent it from being modified dynamically
- The ability to lock content folios to prevent additions
- The ability to unlock folios to allow additions
- The ability to modify folios without tracking revisions in Content Server
- The ability to take a snapshot of a folio in order to track revisions in Content Server
- The ability to download renditions of folio content in .zip, .pdf, or XML format
- The ability to create multiple unstructured content baskets for use in collecting content items

COMPATIBILITY WITH CONTENT SERVER

Folios is compatible with Content Server version 10*g*R3. Previous versions of Content Server are not supported.

PRE-INSTALLATION CONSIDERATIONS

Folios has been designed and tested for use with all Content Server add-ons and components capable of running on Content Server version 10*g*R3. For additional information, see Installation Requirements (page 1-5).

This section contains the following topics:

❖ Changes to Content Server During Installation (page 1-4)

Changes to Content Server During Installation

Several changes are made to Content Server during installation of Folios.

Additional Metadata Fields

The following metadata fields are added to Content Server to record the current state of a folio or template:

❖ CpdIsTemplateEnabled

❖ CpdIsLocked

Additional Views

The following views are added to Content Server and are used on the Folio Edit page to communicate Content Server tables to JavaScript.

❖ NodePropertyView

❖ LinkPropertyView

❖ NodeRemovalTypeView

❖ CpdTreeDisplayFunctionMapView

❖ CpdPopupEditActionsView

❖ ItemPropertyView

- PneDocProfileView

Additional Relations

The following relation is used by PneDocProfileView:

- GenericUserProfileRelation

Additional Tables

The following tables record the links that folios and content baskets have against content in the system

- CpdLinks
- CpdArchiveLinks
- CpdBasketLinks
- CpdEditHistory

Note: Changes made to Content Server during installation of Folios remain even if Folios is disabled or removed.

INSTALLATION REQUIREMENTS

Content Folios requires the following:

- An instance of Content Server 10*g*R3
- Content Folios component (ContentFolios.zip)

If installing on Content Server 10*g*R3 version 10.1.3.3.1, then the following additional component is required:

- The latest 10*g*R3 update patch (10gR3V1Update.zip)

The update components contain necessary updates to Content Server and are available for download from MetaLink (http://metalink.oracle.com), the Oracle support site. Please see the documentation shipped with Content Server for current Content Server hardware and software requirements. Requirements for Content Folios are the same as for Content Server, with the following exceptions:

- Folios does not support the Classic view. Either the Trays or Top Menus view must be used in the Content Server client user profile.

BASIC INSTALLATION PROCEDURE

To install Content Folios, follow these basic steps:

Important: The order in which the required components are installed affects the success of the installation. Please install components in the order listed.

1. Install the latest 10*g*R3 update patch (10gR3V1Update.zip), if necessary, on an existing instance of Content Server 10*g*R3.
2. Install the Content Folios component (ContentFolios.zip).
3. Restart Content Server.
4. Verify the installation.

See Installing Content Folios (page 2-1) for detailed instructions.

SUPPORT

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

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

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

Chapter

2

INSTALLATION

OVERVIEW

Content Folios is a component designed for installation on an existing instance of Content Server. It can be installed via the Content Server web interface using Component Manager, or via the Component Wizard applet interface.

This section covers the following topics:

- Installing Content Folios (page 2-1)
- Verifying Installation (page 2-2)
- Uninstalling Folios (page 2-3)

INSTALLING CONTENT FOLIOS

You can install and enable the Folios component using either of the following methods:

- Installing Folios using Component Manager (page 2-1)
- Installing Folios using Component Wizard (page 2-2)

Installing Folios using Component Manager

To install the Folios component using Component Manager:

1. Log in to Content Server as an administrator.
2. Select **Admin Server** in the Administration tray.
3. Click the applicable Content Server instance button.

4. Click the **Component Manager** link. The Component Manager page is displayed.
5. Click **Browse**, navigate to the **ContentFolios.zip** file, select it, and click **Open**. The path is displayed in the Install New Component field.
6. Click **Install**. A list of component items that will be installed is displayed.
7. Click **Continue**. Component Manager asks if you want to immediately enable the Folios component or return to the Component Manager. Select the option to enable the component.
8. Restart Content Server.

Installing Folios using Component Wizard

To install the Folios component using Component Wizard:

1. Start the Component Wizard by selecting **Start—All Programs—Content Folios—<*instance*>—Utilities—Component Wizard** (Windows) or by running the *ComponentWizard* script in the /*bin* directory (UNIX). The Component Wizard main screen and the Component List screen are displayed.
2. On the Component List screen, click **Install**. The Install screen is displayed.
3. Click **Select**. The Zip File Path screen is displayed.
4. Navigate to the **ContentFolios.zip** file and select it.
5. Click **Open**. The zip file contents that will be installed are added to the Install screen list.
6. Click **OK**. Component Wizard asks if you want to enable the Folios component.
7. Click **Yes**. The Folios component is listed as enabled on the Component List screen.
8. Exit the Component Wizard.
9. Restart Content Server.

VERIFYING INSTALLATION

Upon successful installation of Folios, several new pages, metadata fields, and other items are added to Content Server. For more information on the changes, see Changes to Content Server During Installation (page 1-4). For a listing of all the pages added, see the *Content Folios User Guide*, installed with the component.

UNINSTALLING FOLIOS

You can uninstall the Folios component using either of the following methods:

- Uninstalling Folios Using Component Manager (page 2-3)
- Uninstalling Folios Using Component Wizard (page 2-4)

Note: Changes made to Content Server during installation of Folios remain even if Folios is disabled or removed.

Uninstalling Folios Using Component Manager

To uninstall the Folios component using Component Manager:

1. Log in to Content Server as an administrator.
2. Select **Admin Server** in the Administration tray. The Content Admin Server page is displayed.
3. Click the name of the Content Server instance where the component will be uninstalled. The Content Admin Server <*instance_name*> page is displayed.
4. Click **Component Manager**. The Component Manager page is displayed.
5. Select **ContentFolios** in the Enabled Components list.
6. Click **Disable**.
7. Click **Start/Stop Content Server**. The Content Admin Server <*instance_name*> page is displayed.
8. Restart Content Server.
9. Click **Component Manager**. The Component Manager page is displayed and the Folios component is in the Disabled Components list.
10. Select the Folios component in the Uninstall Component drop-down menu.
11. Click **Uninstall**. Component Manager asks if you want to uninstall the component.
12. Click **OK**. Component Manager displays a message that the Folios component was uninstalled successfully.
13. Select the link to return to the Component Manager. The Component Manager page is displayed.
14. Click **Start/Stop Content Server**. The Content Admin Server <*instance_name*> page is displayed.

15. Restart Content Server to apply the changes.

Note: Uninstalling a component removes the functionality that the component provided Content Server, but the component files are not deleted from the file system.

Uninstalling Folios Using Component Wizard

To uninstall the Folios component using Component Wizard:

1. Start the Component Wizard by selecting **Start—All Programs—Content Folios—<*instance*>—Utilities—Component Wizard** (Windows) or by running the *ComponentWizard* script in the /*bin* directory (UNIX). The Component Wizard main screen and the Component List screen are displayed.
2. On the Component List screen, select the Folios component, and click **Disable**.
3. Restart Content Server.
4. On the Component List screen, select the Folios component, and click **Uninstall**. Component Wizard asks if you want to uninstall the Folios component.
5. Click **Yes**. The Uninstall screen is displayed and lists the zip file contents that will be uninstalled.
6. Click **OK**. The Folios component is removed from the Component List screen.
7. Exit the Component Wizard.
8. Restart Content Server to apply the changes.

Note: Uninstalling a component removes the functionality that the component provided Content Server, but the component files are not deleted from the file system.

Chapter

3

CONFIGURATION

OVERVIEW

Content Folios provides the means to organize content into a hierarchical structure. The structure of a folio can be modified dynamically when creating or editing it, or the structure can be static based on a pre-defined template selected when the folio is created, or lastly it can be a combination of the two.

This section covers the following topics:

- Creating and Editing Folio Templates (page 3-1)
- Defining Folio Structure and Properties with Templates (page 3-2)
- Adding Custom Viewers and Renderers (page 3-11)

CREATING AND EDITING FOLIO TEMPLATES

Folio templates offer the user a predefined organization of nodes, subnodes, slots, and any required content items when creating a folio. A folio template can be selected by a user at the time they create an advanced folio. Folio templates are XML files checked into and managed by Content Server, and can be edited and revised at any time. Revisions to a template are not applied retroactively to existing folios based on that template, but only apply to new folios created based on the template's new revision.

To create folio templates, you must have administration rights to Content Server. Templates are created using the Create/Edit Folio Templates Page (page 3-3), accessed by clicking the Create Folio Template link in the Folio Administration folder on under the Content Server Administration tray.

Creating a Folio Template

To create a folio template, do these steps:

1. Open the Folio Administration folder on the Content Server Administration tray and click **Create Folio Template**. The Edit Folio Template page is displayed.
2. Select **Save template** from the page **Actions** menu. The Set Folio Template Profile page is displayed.

Important: You must save the folio template before navigating away from it. Saving the folio checks the folio into Content Server. If you do not save the folio, it and any changes to it will be lost.

3. Choose the profile to be used with the folio template, if any, and click **Next**. The Folio Template Check In page is displayed.
4. Enter the required information and click **Check in**. The Folio Template Check In Confirmation page is displayed.

Tech Tip: It is a good idea to choose a descriptive title for the template, as it is the title that is displayed in the Folio Template choice list on the Pick Folio Type page.

5. Select how to proceed and click **Finish**. Options are:
   - Continue editing the folio template to add structure or content. The Create/Edit Folio Templates Page is displayed. Add structure and content to the template and set template properties. For more information, see Defining Folio Structure and Properties with Templates and Defining Folio Structure and Properties with Templates.
   - View content information for the folio. The Content Server content information page for the folio is displayed.

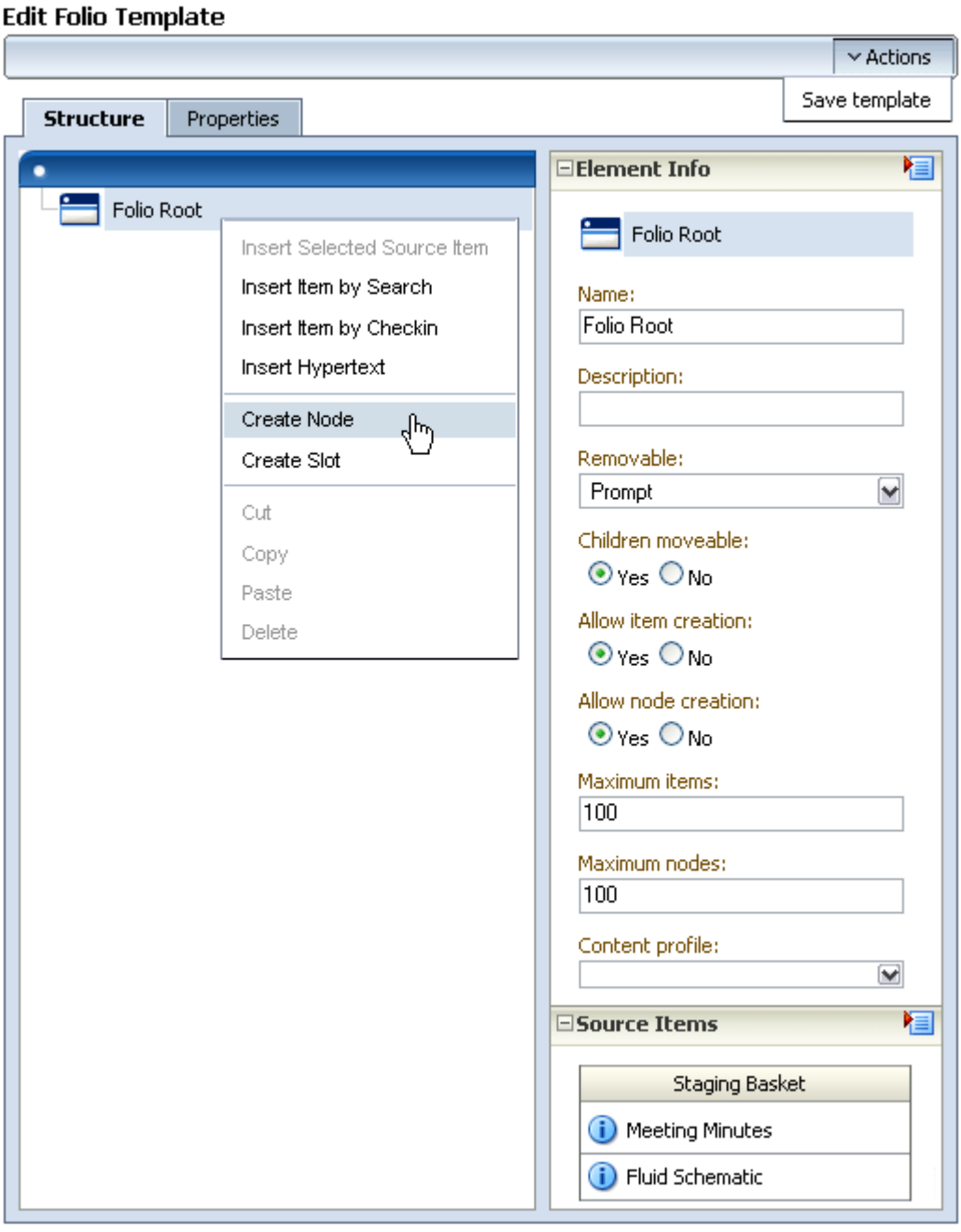
DEFINING FOLIO STRUCTURE AND PROPERTIES WITH TEMPLATES

Folio structure can be pre-defined in a template using the Create/Edit Folio Templates Page. Also, default properties can be specified for both the folio and the template.

This section covers the following topics:

❖ Create/Edit Folio Templates Page

CREATE/EDIT FOLIO TEMPLATES PAGE



The Create/Edit Folio Templates page is accessed by clicking **Create Folio Template** in the Folio Administration folder on the Administration tray. It is used to create a template

that can be selected by a user when creating an advanced folio to provide predefined structure to the folio. The main areas of the Create/Edit Folio Template page are:

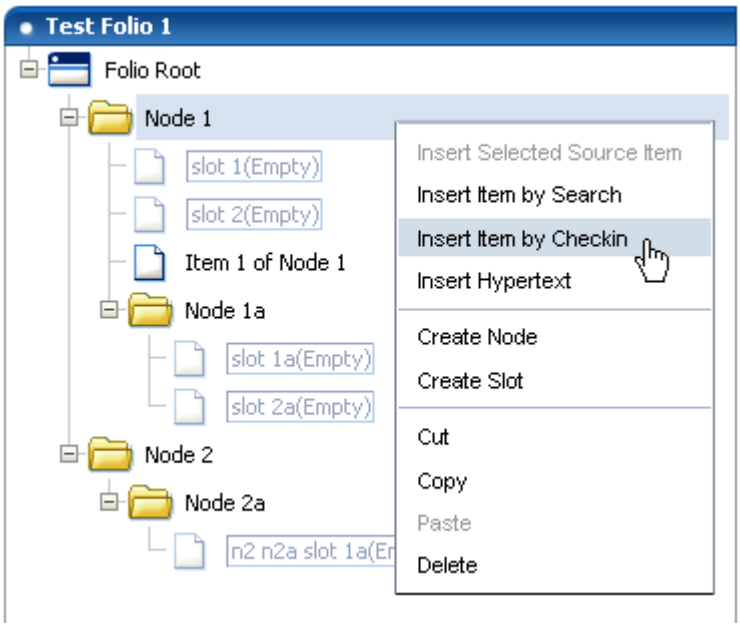
- Structure Tab (page 3-4)
- Properties Tab (page 3-10)

Structure Tab

The left side of the Create/Edit Folio Template Structure tab displays the folio structure. The right side of the tab is a series of trays, similar to the left area of Content Server. Clicking the heading of a tray expands or collapses the tray. The main areas on the Create/Edit Folio Template page are:

- Folio Structure Tray (page 3-4)
- Element Info Tray (page 3-6)
- Source Items Tray (page 3-9)

Folio Structure Tray



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

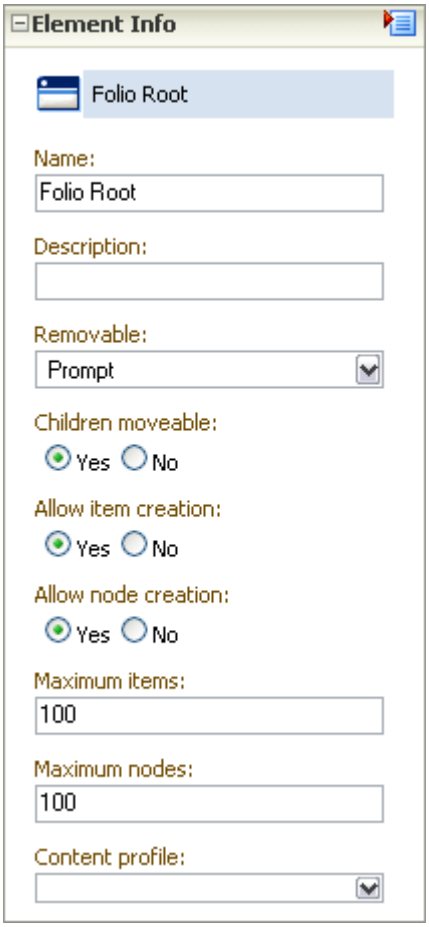
Folio Structure Contextual Menu

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

Item	Description
Insert Selected Source Item	Inserts the item in the folio slot with the selected item from the Source Items Tray (page 3-9). If the slot currently contains a content item, the item is replaced with the source item.
Insert Item by Search	Displays a child window with a search form that searches Content Server for a previously checked-in item, and adds it to the folio in the selected node or slot. If the slot currently contains a content item, the item is replaced with the found content. Available in all contexts: Nodes, Slots, and Items.
Insert Item by Checkin	Displays a child window with a content check in form that checks a new content item into Content Server and adds it to the folio in the selected node or slot. If the slot currently contains a content item, the content item is replaced with the checked in content. Available in all contexts: Nodes, Slots, and Items
Remove Content Item	Removes a content item from a slot. Note that this does not delete the slot, but empties it, leaving the folio structure intact. To delete a slot, you must select Delete from the contextual menu. Available in Item context only.
Insert Hypertext	Creates a new item in the folio structure that can establish a hypertext link to the specified URL. Available in all contexts: Nodes, Slots, and Items
Create Node	Creates a new node or sub-node in the folio structure.
Create Slot	Creates an empty slot in the folio structure.
Cut	Cuts an item, node, or slot from the folio structure for placement elsewhere in the same folio. Available in all contexts: Nodes, Slots, and Items

Item	Description
Copy	Copies an item, node, or slot from the folio structure for placement elsewhere in the same folio. Available in all contexts: Nodes, Slots, and Items
Paste	Pastes an item, node, or slot that was previously cut or copied from the folio structure into another area of the same folio. Available in all contexts: Nodes, Slots, and Items
Delete	Deletes an item, node, or slot from the folio structure. Available in all contexts: Nodes, Slots, and Items

Element Info Tray



The first tray on the right side of the page is the element info tray. Use this tray to articulate the details of each element of the XML template file checked into Content Server to define the folio. When a node, slot, or item is selected in the folio structure section of the page, information about what is selected is displayed in the element info section, where it can be modified. Modified information is written back to the XML file checked into Content Server.

Important: The element information is unique to the folio template, and not to the content item associated with the template. A single content item may be associated with several different folio templates, and the element information about that item may be different in each template. It is important to remember that if you change the element information in one template, it does not change in another.

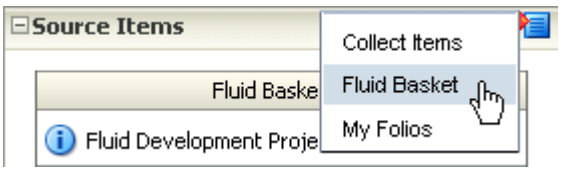
Use the following fields to specify the information for each element in the template.

Information	Description
Name	The name given the element, as displayed in the folio hierarchy. Displayed for all elements.
Description	A description of the element to help identify its intended use. For example, a slot named *Field Report* could have a description of *Information gathered at the scene by first responders.* Displayed for all elements.

Information	Description
Attributes (slots and items)	Allowable uses and limitations of an element. Attributes are identical for slots and items, but differ for nodes. Default attributes for slots and items: ❖ **Allow empty**—The slot can be empty. ❖ **Lock content**—Items cannot be deleted from the slot. ❖ **Removable**—The slot can be deleted. ❖ **Allow external**—An external link can be specified. ❖ **Restrict formats**—Specifies what content item formats are allowed to populate the slot. Formats are identified by the file extension. Syntax for this field is a comma-delimited list of formats as specified in the *Map To Format* information associated with each file extension in the Content Server Configuration Manager. For example, if you want to allow only HTML and text files in the slot, you would enter *text/html,text/plain*. ❖ **Allow folio**—Specifies whether or not a folio can populate the slot. ❖ **Content profile**—Specifies the content profile used when adding an item by search or check in. ❖ **Clone Item**—Specifies whether or not the associated item is cloned. A cloned item is copied and checked into Content Server as a new item at the time a folio based on the template is created. If an item is not cloned, then the original content item is associated with any folio created using the template.

Information	Description
Attributes (nodes)	Default attributes for nodes: ❖ **Removable**—The node can be deleted. ❖ **Children moveable**—Items, slots, and subnodes can be moved within the folio hierarchy. ❖ **Allow item creation**—An item can be created within the node. ❖ **Allow node creation**—Subnodes can be created within the node. ❖ **Maximum Items**—The total number of items that can be created within the node. ❖ **Maximum Nodes**—The total number of nodes that can be created within the node. ❖ **Content Profile**—Specifies the content profile used when adding an item by search or check in.
Content ID	The unique identifier of a content item used by Content Server. Displayed for items and slots. Slots display this attribute as blank.
Create Date	The date a content item was created. Displayed for items and slots.
last modified	The date changes were last made to the content item. Displayed for items and slots.
link	The URL of the hyperlink. Displayed for hyperlinks only.

Source Items Tray



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

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

Properties Tab

The Properties tab allows a system administrator to define the default folio template properties and enable a folio template. The main sections of the Properties tab are:

- Template Properties (page 3-10)
- Folio Default Properties (page 3-11)

Template Properties

The template properties section allows you to specify properties specific to the template and enable it on the Folios user interface for selection by a user when creating a new folio.

Form Element	Description
Template Enabled	Specifies whether or not the template is enabled and available to the user when creating an advanced folio.
Checkin Profile	Specifies the profile to be used when a user checks in a newly created folio based on this template. Specifying a profile here suppresses the option for the user to select one on check in.
Viewer	Specifies the viewer to use for the View Folio page.
Renderers	Specifies what options are available in the Renderers menu on the Edit Folio page. Options are: ❖ zip rendition ❖ pdf rendition ❖ XML rendition

Form Element	Description
Archive revised folio content	Enabling this causes the current revisions of folio content to be compressed into a flat file and stored as the native file of the folio revision each time it is locked or a snapshot is made. This would allow for a system administrator to recover a content item from a previous revision of a folio, even if the content item was subsequently remove from Content Server. This is disabled by default.
Clone Folio Items	Enabling this causes any content items you specify in the template to be cloned when a folio is created from the template. Cloning an item causes a copy to be made and checked into Content Server as a new content item. If this is not enabled, any content item specified in the template is associated with the folio using the existing content ID.

Folio Default Properties

Form Element	Description
Default Folio Profile	Specifies the profile to be used for searching and checking in when adding content items to the folio.
Allow Node Creation	Specifies if nodes can be created.
Allow Item Creation	Specifies if items can be created.
Allow Nested Folios	Specifies if other folios can be added as an item to the folio.
Allow External Items	Specifies if external links can be added to the folio.

ADDING CUSTOM VIEWERS AND RENDERERS

Currently Content Folios ships with a default viewer that mimics the structure of the Create/Edit Folios page, and the following rendition options:

- Zip
- PDF

- XML

Custom viewers and renderers can be developed, but at a minimum, require an understanding of the following:

- the structure of the folio XML
- the folio Idoc Script functions and their proper usage
- the Iterator/Renderer architecture
- the method for using a component to modify/add to the list of viewers & renderers

If you would like to have custom viewers and renderers added, contact Oracle Consulting at http://www.oracle.com/consulting/index.html.

Appendix

A

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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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