Collaboration Manager User Guide

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ORACLE

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Chapter

1

INTRODUCTION

OVERVIEW

This section covers these topics:

ABOUT THIS GUIDE

This guide provides the information that a user needs to know about Collaboration Manager. It explains Collaboration Manager concepts, describes the pages and screens in the Collaboration Manager user interface, and provides step-by-step procedures for working with the Collaboration Manager.

This section contains these topics:

Audience

This guide is for Collaboration Manager users who use or contribute information that is managed in a Content Server.

This guide is divided into these sections corresponding with these types of user tasks:

❖ Setting Up Collaboration Projects (chapter 3)

- Working with Project Links (chapter 4)
- Working with Project Information (chapter 5)
- Using the Folders Component (chapter 6)
- Working with Discussions (chapter 7)
- Using the Workflow Wizard (chapter 8)

Additional conceptual and reference material can be found in the following appendix:

- Security Details (appendix A)

Conventions

- The notation *<install_dir>/* is used to refer to the location on your system where Content Server is installed.
- Forward slashes (/) are used to separate the directory levels in a path name. This is true when referring to files on a Windows file system or on a UNIX system. A forward slash will always appear after the end of a directory name.
- Notes, technical tips, important notices, and cautions use these conventions:

Symbol	Description
	Note: Brings special attention to information.
	Tech Tip: Identifies information that can be used to make your tasks easier.
	Important: Identifies a required step or required information.
	Caution: Identifies information that might cause loss of data or serious system problems.

Collaboration Manager Overview

Collaboration Manager adds functionality to the Content Server by enabling project groups—across various departments or with external business partners—to create a content development environment. Users easily create and remove ad hoc project teams for creating content in a completely secure environment through a browser-based interface. Everyone on the team can access content via a browser or optionally through Windows Explorer or other WebDAV compliant applications.

Collaboration Features

Collaboration Manager enables you to perform the following collaboration functions:

- Define a “project,” which contains folders and content items.
- Control user access to projects and content through security permissions at the project, folder, and content item level.
- Route content items to other users for review.
- Monitor project and content item activity.
- Comment on folders, and content items in a threaded discussion environment.

Projects

Collaboration Manager is based on a “project” model. Projects are seldom permanent, but occur as needed. They can be short-term or long-term in length.

Projects are managed and controlled by the members of the workgroup for that project. Minimal system administrator interaction is required to maintain and modify projects. This means you can easily create projects without other assistance.

You work with projects through the Collaboration Manager Interface (page 3-19). See Working with Projects (page 3-11) for information about project tasks.

Workflow

The workflow process routes information for review and approval before it is released to the content server repository. Users are notified by e-mail when they have information to review. In addition to the standard workflow functionality of Content Server, Collaboration Manager provides sample workflows and a wizard for use with ad hoc routing of project content.

See Chapter 8 (*Using the Workflow Wizard)* for more information.

Discussions

Discussions enable project members to comment on folders and content items in a threaded discussion environment. Threading provides a way to track responses to specific topics. Discussions provide searchable, secure, traceable records of workgroup communication.

See Chapter 7 (*Working with Discussions)* for more information.

Subscriptions

Collaboration Manager enables you to “subscribe” to discussions, folders, and projects as well as the content that you can normally subscribe to with Content Server.

- If you subscribe to a folder or project, you are notified when any content item in that folder or project is revised.
- Subscribing to a discussion notifies you when a new message is posted.

Chapter

2

GETTING STARTED

OVERVIEW

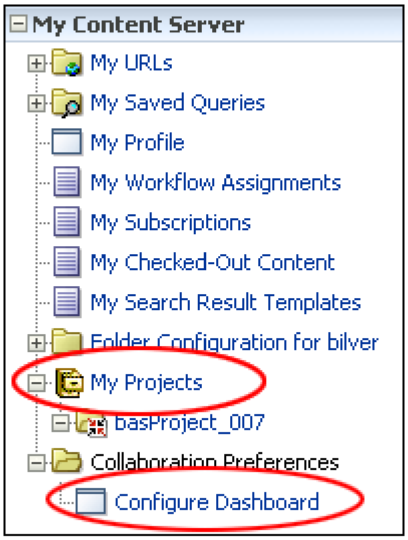
Collaboration Manager makes use of the functionality provided by the Folders component to create virtual folders in Content Server and allow various levels of access to the folder content. Collaboration projects are the top-level unit for organizing information in Collaboration Manager.

Three changes to the Content Server tray area provide initial access to collaboration projects when Collaboration Manager is installed. Also, a Project Links menu is added to project-specific pages, and additional options are added to the Page Actions menu of Content Server.

This chapter covers these topics:

Additional Collaboration Manager pages are discussed in the Collaboration Manager Interface (page 3-19)

My Content Server Tray: My Projects and Collaboration Preferences



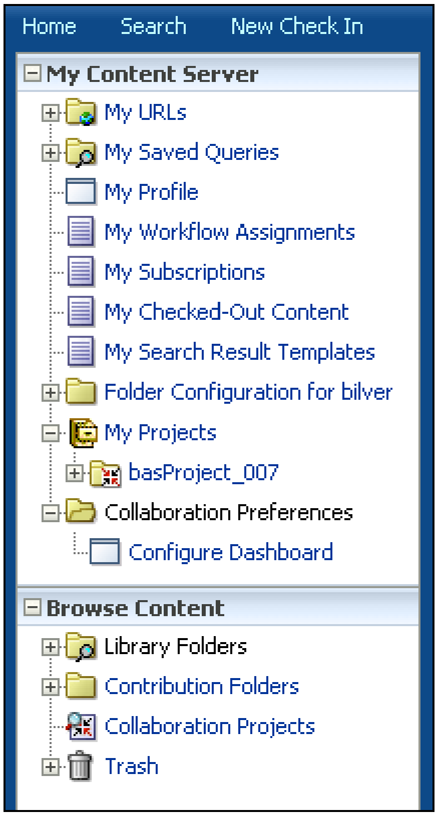
Two links are added to the My Content Server tray when Collaboration Manager is installed:

- My Projects
- Collaboration Preferences

Clicking the *My Projects* link displays a search results page listing all projects you have added to the list using the Page Actions Menu (page 2-5) menu on a collaboration projects listing.

Clicking *Configure Dashboard* under the Collaboration Preferences folder on the My Content Server tray displays the Configure Dashboard (page 4-2) page. The Dashboard is a central location for information about a project. Use the Configure Dashboard page to change the options for viewing alerts, discussions, active workflows, and other information pertinent to a specific project.

Browse Content Tray: Collaboration Projects



One link is added to the Browse Content tray when Collaboration Manager is installed:

❖ Collaboration Projects

Clicking the *Collaboration Projects* link displays the Collaboration Projects Page (page 3-21), a search results page listing all projects to which you have access.

Project Links and Page Actions

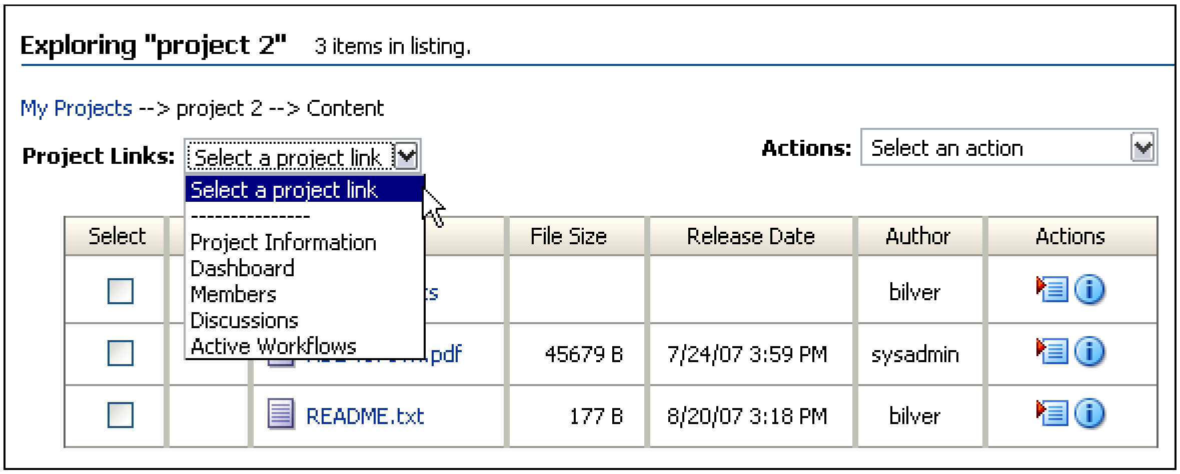
You can explore specific projects by clicking a link in the My Projects folder on the My Content Server tray, or on a project listing search results page. Once a project has been selected, the Project Links menu is active for that project, which provides links to various project options. Additionally, various page actions can be performed, based on the particular page you are accessing.

This section covers the following topics:

❖ Project Links Menu (page 2-4)

❖ Page Actions Menu (page 2-5)

Project Links Menu



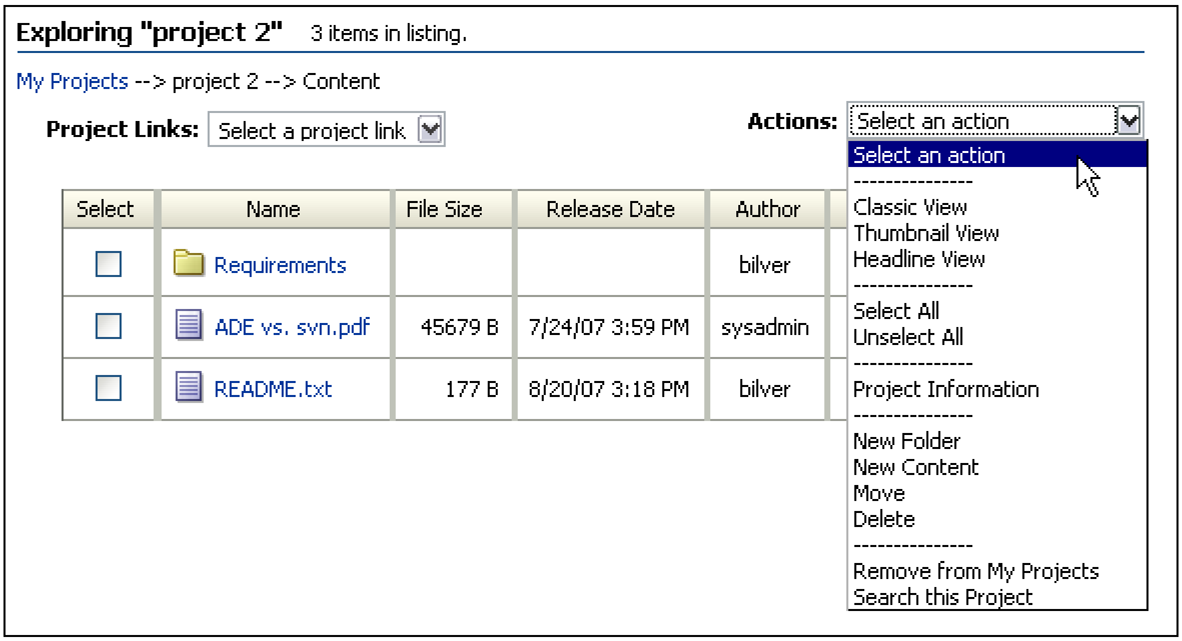
Use project links to work with projects. The available project links are dependent on the project page where they are displayed.

Feature	Description
Project Information	Displays information about the current project, including the author and actions you can take on the project.
Dashboard	Displays information about content, announcements, and workflows for a project in a central location. See Dashboard (page 4-2) for complete details.
Members	Displays the users and groups who have access to the current project and enables you to modify member access. See Members (page 4-11).
Discussions	Displays discussions related to the current project and allows you to contribute to a discussion. See Discussions (page 4-13).
Active Workflows	Displays the Workflows for the project. See Viewing Active Workflows (page 4-14)for details.

The options that are displayed vary depending on where the Project Link drop-down is accessed. For example, ‘Content’ is also an item on the Project Link drop-down menu but it doesn’t appear on the menu on the content page (the page displayed in the above illustration). The Content page displays information about the content associated with a collaboration project.

If an On-Line Conference URL was entered during configuration, the On-Line Conference option appears; it will launch the URL in a new browser window.

Page Actions Menu



Use the page actions to perform relevant actions on the selected projects. The available page actions are dependent on the project page where they are displayed.

Feature	Description
Classic View	A thumbnail image and descriptive text of search results is displayed.
Thumbnail View	A thumbnail image of search results is displayed.
Headline View	A single line list of search results with no thumbnail image is displayed.
Project Information	Displays the Project Information for '<project_name>' Page (page 3-27) for this project.

Feature	Description
New Folder	Displays a screen where you can define virtual folders.
New Content	Displays a content checkin page.
Move	Displays a screen where you can move virtual folders and content.
Delete	Deletes the selected item.
Add to My Projects/ Remove From My Projects	Adds currently viewed project to the My Projects list. If the project is currently in My Projects, the available action is *Remove From My Projects,* which removes the project from the My Projects list.
Search this Project	Opens a search page with project specific fields filled in (security group and account).
Open Web Folder	Helps you in your Viewing a Project (page 3-15).

Chapter

3

SETTING UP COLLABORATION PROJECTS

OVERVIEW

Collaboration Manager makes use of the functionality provided by the Folders component to create virtual folders in Content Server and allow various levels of access to the folder content. Collaboration projects are the top-level unit for organizing information in Collaboration Manager. Within a project, you can create a hierarchical structure of folders and subfolders that contain content items and discussions. When a project is created, a top-level virtual folder is defined and project members are assigned to the project. Secure access to content can be propagated throughout the project or modified for each specific new content folder or item. Member access can be modified at any time by project members with the appropriate permissions and roles. For more information on project security, permissions, and roles, see Appendix A (*Security Details*).

This chapter covers these topics:

Concepts

Tasks

Reference

About Collaboration Projects

Security permissions set up by the system administrator determine who can create, edit, delete, and view projects. Users who have the appropriate permissions to the project can then decide which users have access to folders, content items, and discussions within the project. (See Planning Project Security (page 3-3) for more information.)

Each project has a *project lead*, who has Admin permission for the project and serves as the main project contact. The project lead cannot be removed from the project and their permission cannot be changed.

When you create a project, you can specify whether the members should be notified about the new project by e-mail. When you add new members to an existing project, they can also be notified by e-mail. However, if you delete members from an existing project or change a member's permissions, they are not notified.

You work with Projects through the Collaboration Manager Interface (page 3-19). See Working with Projects (page 3-11) for information on project tasks.

PLANNING A COLLABORATION PROJECT

When you plan a collaboration project, you need to think through the purpose of the group, the types of content that will be worked on, and the security/accessibility of that content. Then you can create the project using the Add/Edit Collaboration Project Page (page 3-31).

If you need to alter collaboration projects, you can do so also using the Add/Edit Collaboration Project Page (page 3-31). Be advised, there are ramifications to changing some project aspects after the project is active.

You can set up collaboration projects to meet a variety of needs. You will want to consider all of the basic information in *Content Server User Guide* and the following points:

- Will the project team be ad hoc? That is, will you need to add users to the team on an as-needed basis?
- Does the content need to be widely accessible or tightly controlled?
- Who needs to make decisions about widening access?
- What's the process for determining when collaboration content can be more widely published?
- What online conferencing center will be used?
- How will I identify my projects?
- What subscriptions should be mandatory for project members?
- Can metadata be propagated within this project?

This document discusses these topics in more detail, to aid you in setting up your project.

After you have a collaboration model designed, it's important to test that project with a subset of those people who will be involved. Testing helps you verify that your security model and collaboration setup are functioning as you planned. After you are certain that the collaboration project is correctly designed, you can implement it with all of the members of the collaboration team involved.

PLANNING PROJECT SECURITY

Security is an important consideration when you set up a collaboration project. Security for Collaboration Manger, although based on Content Server security models, is more complex due to the additions of projects in Collaboration Manager. Therefore, it's important to understand these differences as you plan.

You should discuss a security model with your system administrator before setting up a collaboration project. There are two general approaches to security for projects:

- A conservative model: most users are given the minimum permissions possible and the project administrator extends the permissions as needed to individual content, folders, or projects.
- A liberal model: users are given wide permissions and the project administrators can restrict permissions to individual parts of the project.

Depending on the type of data security model your site uses, you will need to change permissions as needed. See Appendix A (*Security Details*) for tables which describe minimum permissions and what types of access they provide.

Security is provided at many different 'levels' in collaboration projects. One analogy for the different types of security is that of a file cabinet, which represents the Security group. In order to participate in a collaboration project, users must have access to the cabinet (be added to the **security** group) and have access to the individual drawers, which represent projects (the **prj** account group).

In order to access a specific drawer (a specific project), the user must be given permission to access that drawer by the collaboration project manager.

Within the drawer (a collaboration project), individual files and folders can be stored. Again, users can have permission to either all content in a drawer (everything in a project) or specific items within the project (folders and other content items). These varying permissions are set by the collaboration project manager as the project is set up.

Thus, it would be possible for a collaboration participant to have access to a project (a file drawer) but have restricted permissions on elements of the project (the contents of the file drawer) depending on how the security permissions are established. Therefore, it's important to understand how security permission overlap to ensure that the correct permissions are given to the correct people who participate in a collaboration.

This section covers these security topics in more detail:

About Permissions

Permissions determine what type of access a user has to projects, folders, and content items. In general, the following permissions are used:

- Read (R)

- Write (W)
- Delete (D)
- Administration (A)

Depending on the type of function, the permissions allow a different range of manipulation of the project, content item, or folder.

Rights

Rights determine what access a user has to work with administration tools in Collaboration Manager. Some organizations designate certain users as *subadministrators* who have rights to perform specific administrative tasks. The following rights can be assigned to subadministrators:

Right	Description
UserAdmin	Subadministrator can use the User Admin tool to add, edit, and delete users whose system-level Specific Project Permissions (page 3-7) are a subset of the subadministrator's permissions.
RepMan	Subadministrator can use the Repository Manager tool to work with content items for which the subadministrator has Admin permission.
Workflow	Subadministrator can use the Workflow Admin tool to add, edit, or delete workflow templates.
WebLayout	Subadministrators can use the WebLayout Admin tool to add, edit, and delete Library pages to which the subadministrator has Admin permission for the corresponding security groups and accounts.

Rights are assigned by the system administrator when user accounts are established. See the *Managing Security and User Access Guide* for more information.

Accounts and Security Groups

There are multiple levels of security, beginning with accounts and security groups.

A security group is a group of content. All individual information in Content Server belongs to a security group. Users must have permission for the *Projects* security group in order to access Collaboration Manager functions. Contact your system administrator to verify that users involved in collaboration projects have the appropriate permissions.

An account is also a further grouping of content and has a metadata field that associates a piece of content with the account. A user must have permission to the account to view or check in content in the account. Users are assigned appropriate permissions to the account by the system administrator. All project accounts are assigned as sub-accounts to a top-level *prj* account. Each project account is of the format *prj*/PRJ0000001. In order for users to participate in collaboration projects, they must be assigned to the *prj* account.

Users, Groups, and Members

In addition to the standard users, roles, accounts, and security groups, Collaboration Manager has the concept of members. For each project, the creator of the project designates users and groups to be *members* of the project and to have varying degrees of access to projects, folders, and content. Also, additional users and groups can be given access to individual folders and content items even if they are not project members.

A **member** is a user or group who has been given access to a particular project, folder, or content item. You do not have to be a system administrator to specify members for a project, folder, or content item that you are creating. See Security Levels (page 3-6) for more information.

- **Internal** members are users and groups who are employees of your company or members of your organization.
- **External** members are users and groups who have access to your Collaboration Manager system but are not employees of your company or members of your organization.

The internal or external designation is assigned to users when they are added to the Content Server database.

You must have Admin (A) permission to a project to add, delete, or modify permissions for project members. By default, the user designated as project lead is a member of a project and cannot be removed from the project.

Security Levels

Collaboration Manager applies security at four levels. The Specific Project Permissions (page 3-7) and Rights (page 3-5) you have for a particular project, folder, or content item is a combination of all four of these security levels:

- **System—**Your system administrator assigns system-level permissions and rights to each user. This security level determines if you are able to create projects, change member access to content, and perform administrative duties, such as adding new users or creating workflow templates.

❖ **Project—**Each project has a list of users and groups that have specific permissions for that project. Each project has a *project lead*, who has full administrative permission to the project.

❖ **Folder—**Each folder has a list of users and groups that have specific permissions for that folder. Members who have access to the parent project can be restricted from the folder, and members who do not have access to the parent project can be given permission to an individual folder. Each folder has a *folder owner*, who has full administrative permission to the folder.

❖ **Content Item—**Each content item and discussion has a list of users and groups that have specific permissions for that item. Members who have access to the parent project and folder can be restricted from the content item or discussion, and members who do not have access to the parent project or folder can be given permission to an individual content item or discussion.

Note: Your system administrator will set up a security model that best fits your organization's needs. Because security is a complex topic, and your system will most likely be unique, detailed information on the different possible combinations of security access is not discussed here. For more information, contact your system administrator, or see the *Managing Security and User Access Guide*.

Specific Project Permissions

As mentioned previously, permissions determine what access a user has to work with projects, folders, and content items. There are four permissions available at all security levels: Read (R), Write (W), Delete (D), and Admin (A). The following topics explain permissions in more detail:

❖ Project Permissions (page 3-8)

❖ Folder Permissions (page 3-9)

❖ Content Item Permissions (page 3-10)

Note: Project, folder, and content permissions apply only if the user has equal or greater permission at the system level. For example, if a user has only Read permission at the system level, they will not be able to perform content item functions that require Write permission.

Project Permissions

You can assign the following project permissions to users:

Permission	User can perform these functions:
Read (R)	• view the project
Write (W)	Same as Read permission, plus: • check content into and out of the project
Delete (D)	Same as Write permission.
Admin (A)	Same as Delete permission, plus: • update project metadata • update project members • delete the project • restore the project from the Recycle Bin

Folder Permissions

You can assign the following folder permissions to users:

Permission	User can perform these functions:
Read (R)	• view the folder • view the discussion associated with the folder
Write (W)	Same as Read permission, plus: • add a folder to a project • check content into and out of the folder • post to the folder discussion • move folders • create folder shortcuts • delete shortcuts to the folder • update folder metadata • restore the folder from the Recycle Bin • restore a deleted item to the folder from the Recycle Bin
Delete (D)	Same as Write permission, plus: • delete the folder
Admin (A)	Same as Delete permission, plus: • update folder members

Content Item Permissions

You can assign the following content item permissions to users:

Permission	User can perform these functions:
Read (R)	• view the content item • get a copy of the file • view the web-viewable file • view the discussion associated with the content item
Write (W)	Same as Read permission, plus: • check in the content item • check out the content item • post to the content item discussion • update content item metadata • delete shortcuts to the content item • restore the content item from the Recycle Bin
Delete (D)	Same as Write permission, plus: • delete the content item
Admin (A)	Same as Delete permission, plus: • update content item members

ALTERING SECURITY WITH ENABLEFORCEDACLSECURITY

The `EnableForcedACLSecurity` configuration variable can be used to alter the behavior of collaboration project security. This variable allows administrators to further delineate what information users can access. Without this ability, users with standard Content Server Admin permissions/rights could access portions of a project for which they did not have project rights. For example, a user with standard Content Server Admin permissions on the *Projects* security group could view a folder even if they did not have permissions to that folder established in the project. By using the `EnableForcedACLSecurity` configuration variable, an administrator can set security to always evaluate the access lists for specific content items and folders. For example:

- If `EnableForcedACLSecurity=TRUE` (the default)
  - the access list of each content item or folder augments standard Content Server security models for each user that is not assigned the Content Server ADMIN role. This means that if a user is not assigned the Content Server ADMIN role, then access to project content is dependent on the intersection of the R, W, D, or A permissions established for that content, and the standard Content Server security group and accounts permissions.
  - if a user is assigned the Content Server ADMIN *role* when EnableForcedACLSecurity=TRUE, then the entity access lists are bypassed, and standard Content Server security models determine access to the content.
- If `EnableForcedACLSecurity= FALSE`
  - standard Content Server security models take precedence over the Collaboration Manager access lists.

See Appendix A (*Security Details*) for further details about the effect of the `EnableForcedACLSecurity` configuration variable.

WORKING WITH PROJECTS

Note: The information displayed throughout the Collaboration Manager interface depends on the permissions you have been given in the project. Users with Administrative permission will see information that other users do not see.

This section covers these common Collaboration Manager tasks:

Adding a Project

To create a new project:

1. Select **New Project** from the Collaboration Projects Page (page 3-21) Actions menu. The Add/Edit Collaboration Project Page (page 3-31) is displayed.
2. Enter a name for the project in the **Project Name** field.

   Note: To create the project, you can click **Save** at any time, as long as you have entered a project name. However, we recommend that you assign permissions and default content information while you are creating the project rather than at a later time.

3. Enter a brief description of the project in the **Description** field.

Adding Members to a Project

There are two ways to add members to a project:

❖ By using the Add/Edit Collaboration Project Page (page 3-31).

❖ By using the Project Members for '<project_name>' Page (page 3-36)

1. To add individual users to the project from the Project Members for '<*project_name*>' page, select the appropriate option from the page Action menu. When using the Add/Edit Collaboration page, click **Add User** in either the Internal or External user pane To add groups to the project, click **Add Group** in either pane.

   The Select User/Groups Screen (page 3-48) is displayed. Select a user or group in the list.

   - Typing letters in the name entry field jumps to the first matching entry in the first column.
   - Click the Page First, Page Up, Page Down, or Page Last button to navigate through the list.
   - Click a check box to select the access level you want the selected user or group to have.

2. Click **Add to List**.

   The selected user or group is added to the field at the bottom of the screen. You can edit this field to delete a user or group or change permissions.

3. Select more users or groups and assign permissions as necessary.
4. To specify a different user as the project lead, check the box next to the user name in the Collaboration Page then click the **Change Lead** button.
5. Click **Save** when using the Add/Edit Collaboration Project page or **Update** when using the Project Members page.

Working with Project Options

1. If the **On-line Conference Center** field is present and you want to provide a link to an online meeting web site, enter the complete URL (for example, *http://company.webex.com*).
2. Specify whether users can perform Propagating Metadata (page 5-4) from the project level.
   - To disable metadata propagation from the project level, select the **Inhibit Propagation Updates** check box.
   - To enable metadata propagation from the project level, clear the **Inhibit Propagation Updates** check box.
3. Specify if Project Notification (page 3-49) e-mails will be sent to project members:
   - To enable all project notifications, select the **Send project notifications** check box.
   - To disable project notifications, clear the **Send project notifications** check box.

Entering Default Metadata

1. Enter any default information that you want to be assigned to content items checked into the project.
   - Default metadata values are applied to content items only on initial checkin; these settings do not affect revisions to existing content.
   - These default metadata values can be overridden by the author during the checkin process.
   - If you assign a default Author, make sure that user has permission to the project. All other project members will need Admin permission to check in content using the default Author.
2. Click **Save**.

If project notifications are enabled for the project, the specified project members receive a Project Notification (page 3-49) e-mail message.

Updating Project Information

To update existing project information, perform these tasks:

1. Display the Add/Edit Collaboration Project Page (page 3-31) for the project.
2. Modify the project metadata, member list, and member permissions as necessary. If you change the project name, each user must update their My Projects list for the name change to be reflected.
3. Click **Submit Update**.

If you added new members to the project and project notifications are enabled, the new members receive a Project Notification (page 3-49) e-mail message. If you deleted members or changed member permissions, those members are **not** notified.

Note: If you add members to a project, they do not automatically receive permission to any of the folders, content items, or discussions in that project. To assign permission to items in the project, you can either:

- Use the Metadata Propagation function to copy member information from the project to subfolders and content within the project.
- Assign access to each individual item in the project as appropriate.

Tech Tip: It is often easiest and best to add new members to an existing project team by adding members to existing aliases. This reduces confusion about permissions.

Deleting Members from a Project

There are two ways to delete members from a project:

- By using the Add/Edit Collaboration Project Page (page 3-31).
- By using the Project Members for '<project_name>' Page (page 3-36).

To delete members from a project, perform these tasks:

1. Check the box next to the user or group in the list.
2. Click **Delete** (when using the Add/Edit Collaboration Project Page), or select **Delete Selected Members** from the Action pull-down menu (when using the Project Members for “name” page).

   The selected user or group is deleted.
3. Click **Save** when using the Add/Edit Collaboration Project page or **Update** from the Project Members page.

Changing Permissions

There are two ways to change permissions for project members:

- Using the Add/Edit Collaboration Project Page (page 3-31).
- Using the Project Members for '<project_name>' Page (page 3-36).

To change permissions for a project member, perform these tasks:

1. Check the box next to the user or group in the list.

2. Click the permission buttons to highlight the access level you want to be applied to each project member. A red border identifies permissions that have been changed, and an Update button appears.
3. Click **Submit Update** on the Edit Collaboration page or **Update** on the Project Members page.

Finding a Project

Note: A project search from Collaboration Projects Page (page 3-21) looks for all projects to which you have access.

1. Select **Find Projects** from the page Actions menu on the Collaboration Projects Page (page 3-21). The Find Projects Page (page 3-23) is displayed.
2. If necessary, display the metadata search options, click the Show Options icon .
3. Enter metadata search criteria in the metadata fields. For more information, see the *Content Server User Guide*.
4. Select metadata search operators as necessary.
5. If necessary, specify the sort field, sort order, and number of search results in the Search Results Options pane.
6. Click **Search**. The projects that meet your search criteria are displayed on the Find Projects Results Page (page 3-24).

Performing a Quick Full-Text Search

With Collaboration Manager, you can search for discussion content as well as standard content using the standard Content Server Quick Search feature.

Viewing a Project

There are several ways to view a project:

❖ Click the project link in the My Projects list in the Collaboration Manager Interface (page 3-19).

❖ Search for the project from the Find Projects Page (page 3-23), and click the project link.

❖ When using Internet Explorer, select **Open Web Folder** from the page Actions menu to display the folder in the explorer view of the browser. To view a project in WebDAV view, your system administrator must have enabled WebDAV. If WebDAV is not enabled, then the Open Web Folder option is not available in the page Actions menu.

Editing My Projects List

You can edit the projects displayed in your My Projects list from a Project Information for '<project_name>' Page (page 3-27), or from any of the project search results listing:

- ❖ Collaboration Projects Page (page 3-21)
- ❖ Exploring "My Projects" Page (page 3-22)
- ❖ Find Projects Results Page (page 3-24)

To edit the My Projects list from a Project Information page, do these steps:

1. Access the Project Information for '<project_name>' Page (page 3-27) for the project.
2. From the Actions menu, click **Remove from My Projects** to remove from the list, or **Add to My Projects** to add to the list. The project is added to your My Projects list.

To edit the My Projects list from a project search results page:

1. Access a project search results page.
2. Select the check boxes for the projects you want added to or removed from the My Projects list.
3. Select the action **Add to My Projects** or **Remove from My Projects**. An icon is displayed in or removed from the icon column of the search results list to indicate the change in status of the project in your My Projects list. The My Project list is updated to show the selected projects in alphabetical order.

WORKING WITH THE TRASH

This section covers these topics:

- ❖ About Deletions (page 3-17)
- ❖ Deleting Projects, Folders and Content Items (page 3-18)
- ❖ Permanently Deleting from Trash (page 3-19)
- ❖ Restoring from Trash (page 3-19)

About Deletions

Caution: When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. When you delete a content item, all revisions of that content item are deleted. **Be extremely careful when deleting folders and content items so that you do not accidentally delete content that you want to keep.**

Consider the following information when deleting virtual folders and content items:

- ❖ When you delete folders and content items from the Folders hierarchy, the action that occurs depends on whether the Trash function is enabled and whether you have chosen to use the Trash function in your User Profile:

Trash Bin Functio n (enabled by system administrator)	*Remove items immediately when deleted* check box on the Folder Configuration Page	Result
Enabled	Clear	Deleting a folder or content item moves it to the Trash folder. Items can be permanently deleted or restored from the Trash folder.
Enabled	Selected	Deleting a folder or content item permanently deletes it. Items cannot be restored.
Disabled	Selected or Clear	Deleting a folder or content item permanently deletes it. Items cannot be restored.

- ❖ To delete a content item, you must have Delete permission to the content item's security group.
- ❖ To delete a virtual folder, you must be the Owner of the folder or a user with Delete permission to the folder's security group.
- ❖ If a folder contains any content items or subfolders that you do not have permission to delete, you will not be able to delete the folder.
- ❖ If you delete a system-level folder (such as a project root folder), the folder is actually disabled rather than being deleted. Only the system administrator can reactivate a system-level folder.

If WebDAV functionality is set up on your system, the following sequence of events could cause unexpected results:

1. Check in content item "A".

2. Check in a revision to content item “A” with a different file name. (This would have to be done from the content server Content Information page; it cannot be done through a WebDAV client.)
3. Check content item “B” into the same folder with the same file name as the first revision of content item “A”.
4. Delete the last revision of content item “A”. (This would have to be done from the Content Information page.)

The result is that two content items with the same file name will be in the folder, but only one of them will appear when viewed in a WebDAV client.

Note: To delete a content item, you must have Delete permission for the security group of that content item. To delete a folder, you must be the Owner of the folder or have Delete permission for the folder’s security group, and you must have Delete permission for the security groups of all subfolders and content items within the folder.

Deleting Projects, Folders and Content Items

Use the following procedure to delete projects:

1. Access any of the project search results listing:
   - Collaboration Projects Page (page 3-21)
   - Exploring "My Projects" Page (page 3-22)
   - Find Projects Results Page (page 3-24)
2. Select the check boxes for the projects you want deleted.
3. Select **Delete Project** from the page Actions menu. A dialog box is displayed asking you to confirm that you want the project deleted.
4. Click **OK**. The Exploring “Trash” Page (page 3-44) is displayed showing the deleted project alphabetically in the trash listing. At this point you can leave the project in the trash, or follow the procedure Permanently Deleting from Trash (page 3-19) or Restoring from Trash (page 3-19).

Use the following procedure to delete folders and content items:

1. Access the page containing the virtual folder or content item you want to delete. Page options include:
   - Exploring "<project_name>" Page (page 3-25) to delete projects.
   - Exploring "<folder_name>" Page (page 3-26) to delete projects.
2. Select the check box next to each folder or content item to be deleted.
3. Select **Delete** from the page Actions menu.A dialog box is displayed asking you to confirm that you want the item or items deleted.

4. Click **OK**. The page is refreshed with the folder or item removed. All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are deleted and moved to the trash. At this point you can leave the items in the trash, or follow the procedure Permanently Deleting from Trash (page 3-19) or Restoring from Trash (page 3-19).

Permanently Deleting from Trash

To permanently delete an item from the trash folder:

1. Access the Exploring “Trash” Page (page 3-44).
2. Select the check box next to each folder and content item to be permanently deleted.
3. Select **Delete** from the Actions list. A dialog box is displayed asking you to confirm that you want the project deleted.
4. Click **OK**. All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are permanently deleted from the content server.

Restoring from Trash

To restore an item from the Trash folder to its original parent folder:

1. View the Exploring “Trash” Page (page 3-44) for the Trash folder.
2. Click the Actions icon and select **Restore**. (You can only restore one item at time.)
3. Click **OK**.The item is restored to its original parent folder.

   Note: If the original parent folder has been deleted and is still in the Trash folder, the restored item will be moved to the original folder. If the original folder has been permanently deleted, you will not able to restore the item.

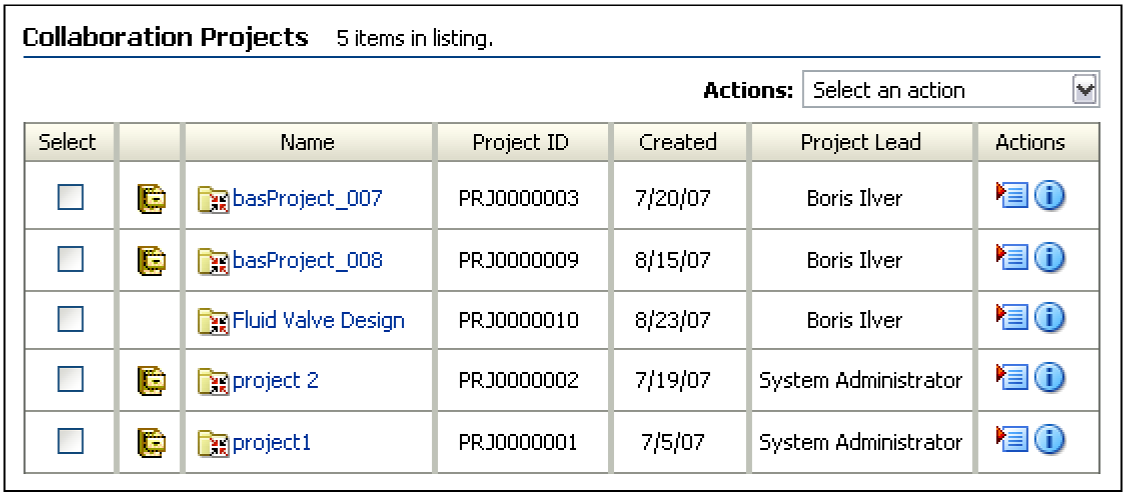
COLLABORATION MANAGER INTERFACE

Note: The information displayed throughout the Collaboration Manager interface depends on the permissions you have been given in the project. Users with Administrative permission will see information that other users do not see.

This section describes the interface used with the Collaboration Manager and shows how it integrates with Content Server:

Note: Interface screens for Discussions are found in Chapter 7 (*Working with Discussions)*, as well as the *Content Server User Guide*.

Collaboration Projects Page



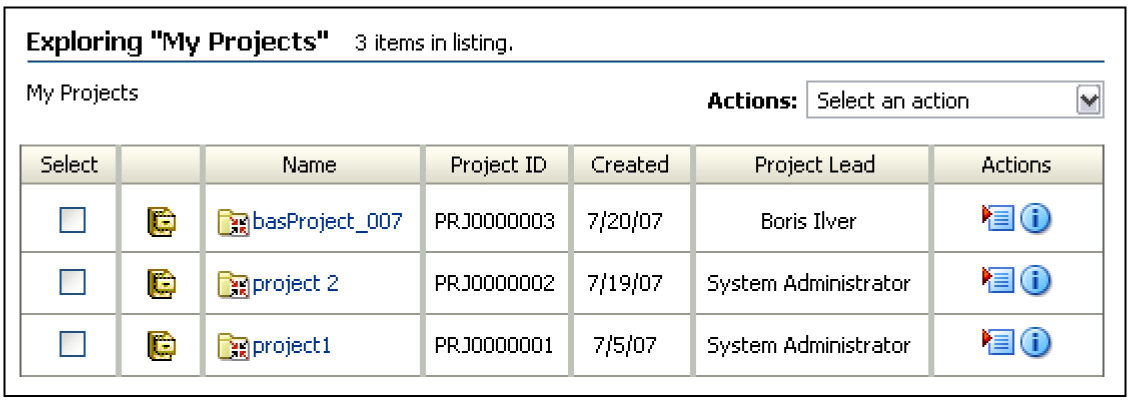
Clicking the Collaboration Projects link on the Browse Content tray displays a search results page listing all collaboration projects to which you have access. From this listing, you can use the Page Actions Menu (page 2-5) menu to create a new project, delete an existing project, access the Find Projects Page (page 3-23) to search for projects, and add or remove selected projects to or from the Exploring "My Projects" Page (page 3-22).

The Collaboration Projects page is an example of the type of projects search results page format that is used in the Collaboration Manager user interface. The table columns are identical to those used on the Exploring "My Projects" Page (page 3-22).

Column	Description
Select	Enables a project in the list to be affected by a selection in the page Actions menu.
Icon column	Displays a cabinet icon if the project has been added to your My Projects list.
Name	The name of a project. Clicking the project name displays the Exploring "<project_name>" Page (page 3-25) for a project.
Project ID	The project ID is a unique identifier used by Content Server.
Created	Lists the date a project was created.

Column	Description
Project Lead	Lists the name of the project member specified as the project lead. The project lead is specified at the time a project is created, and can be changed using the Add/Edit Collaboration Project Page (page 3-31).
Item Actions column	Displays links to the Project Information for '<project_name>' Page (page 3-27) and to the item actions contextual menu.

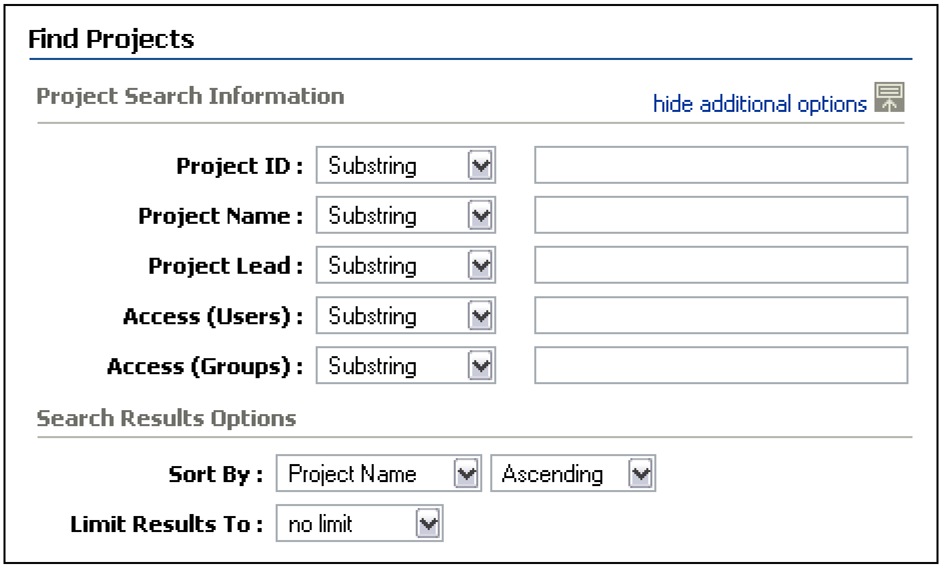
Exploring "My Projects" Page



The Exploring "My Projects" page is accessed by clicking the My Project link in the My Content Server tray. It displays a list of all projects you have requested to be added using the Page Actions Menu (page 2-5) on a search results listing or project information page, or using the item actions menu in the Actions column of a search results listing.

The Exploring "My Projects" page is an example of the type of projects search results page format that is used in the Collaboration Manager user interface. The table columns are identical to those used on the Collaboration Projects Page (page 3-21).

Find Projects Page

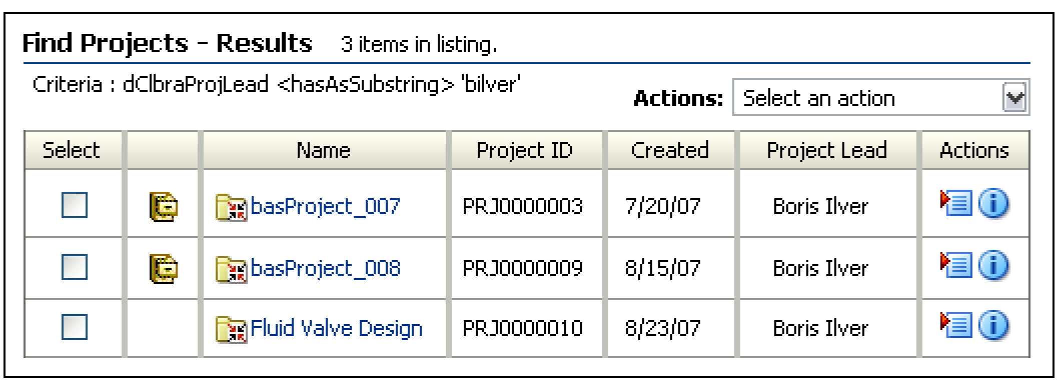


The Find Projects page is accessed by selecting Find Projects from the Actions menu of the Collaboration Projects Page (page 3-21). It is used to search for projects in Content Server that meet specified criteria.

Element	Description
Project ID	Enter the Project ID for the project you are searching for. The Project ID is a unique identifier used by Content Server.
Project Name	Enter the name of the project established at the time the project is created.
Project Lead	Enter the name of the project member specified as the project lead. The project lead is specified at the time a project is created, and can be changed using the Add/Edit Collaboration Project Page (page 3-31).
Access (Users)	Enter a project member name.
Access (Groups)	Enter a project group name.

Element	Description
Sort By	Sort options for the search results list. ❖ **Project Name**—Search results are listed alphabetically by project name. ❖ **Is in My Projects**—Search results are grouped by whether or not you have selected a project to appear in your My Projects list. ❖ **Project ID**—Search results are listed numerically by project ID. ❖ **Project Date**—Search results are listed chronologically by the date a project was created. ❖ **Project Lead**—Search results are listed alphabetically by the name of the project lead. ❖ **Ascending**—Search results are displayed in ascending order. ❖ **Descending**—Search results are displayed in descending order.
Limit Results To	Specifies the number of projects to display in the search results.

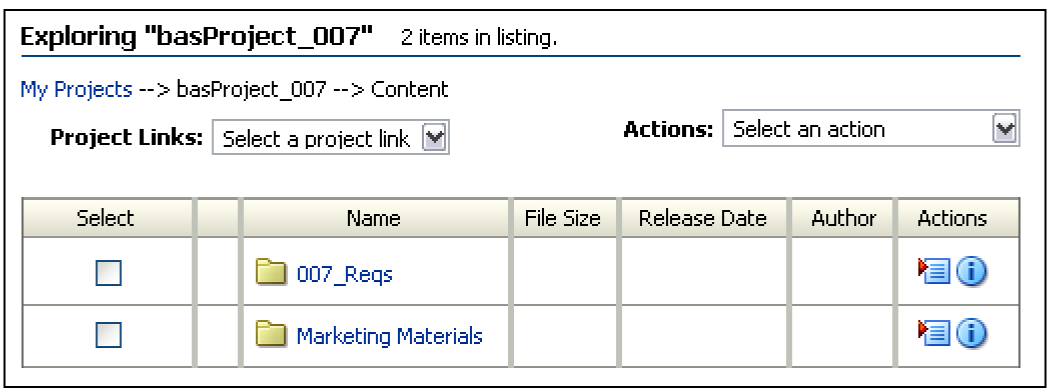
Find Projects Results Page



To access the Find Projects Results page, click the Search button on the Find Projects page.

Feature	Description
Select boxes	**Selected**—The project is available for you to specify actions. **Clear**—The project is not acted upon.
My Projects	Indicates if the project was added to the My Projects list.
Name links	Displays the Exploring page for the selected project.
Project ID	The identifier for the project. This is an auto generated number that has the form PRJXXXXXX where X is the next number in the sequence.
Created	The date the project was created.
Project Lead	Shows the project lead for each project.
Actions	❖ **Actions icon ( ):** lists available actions for the item. ❖ **Info icon ( ):** Displays the Project Information page for the item.

Exploring "<*project_name*>" Page

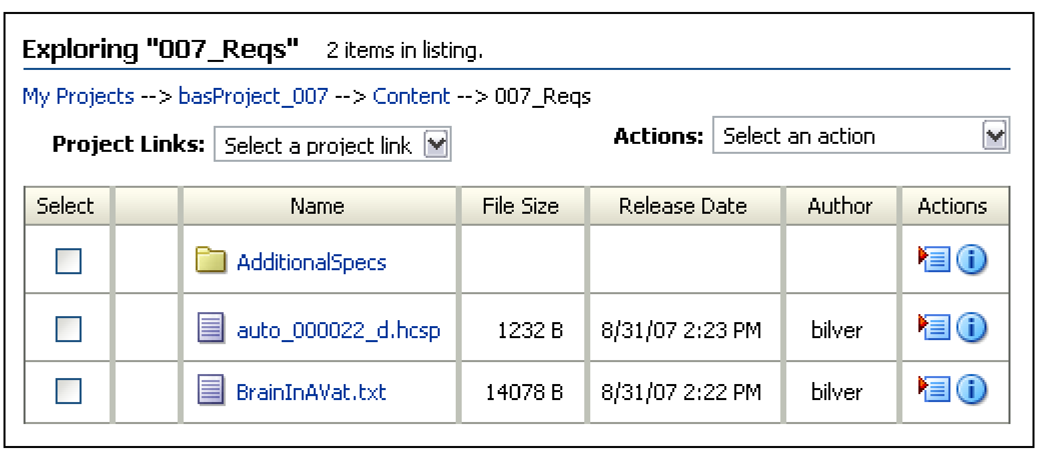


The Exploring “<*project_name*>” page is displayed when you click a project name in a search results listing or under the My Projects or Collaboration Projects folder in the tray area. It lists all folders and content associated with the specific project.

The Exploring “<*project_name*>” page is an example of the type of folders search results page format that is used in the Folders component user interface.

Column	Description
Select	Enables a project in the list to be affected by a selection in the page Actions menu.
Icon column	This column is not used in this search result.
Name	The name of a content folder or item associated with the project. Clicking the name of a folder displays the Exploring "<folder_name>" Page (page 3-26). Clicking the name of a content item prompts you to download or open the native file.
File Size	Displays the size in bytes of a content item. This column is left blank for folders.
Release Date	Displays the date the current revision of a content item was released. This column is left blank for folders.
Author	Displays the name of the person who last checked in a content item. This column is left blank for folders.
Item Actions column	Displays links to the Project Information for '<project_name>' Page (page 3-27) and to the item actions contextual menu.

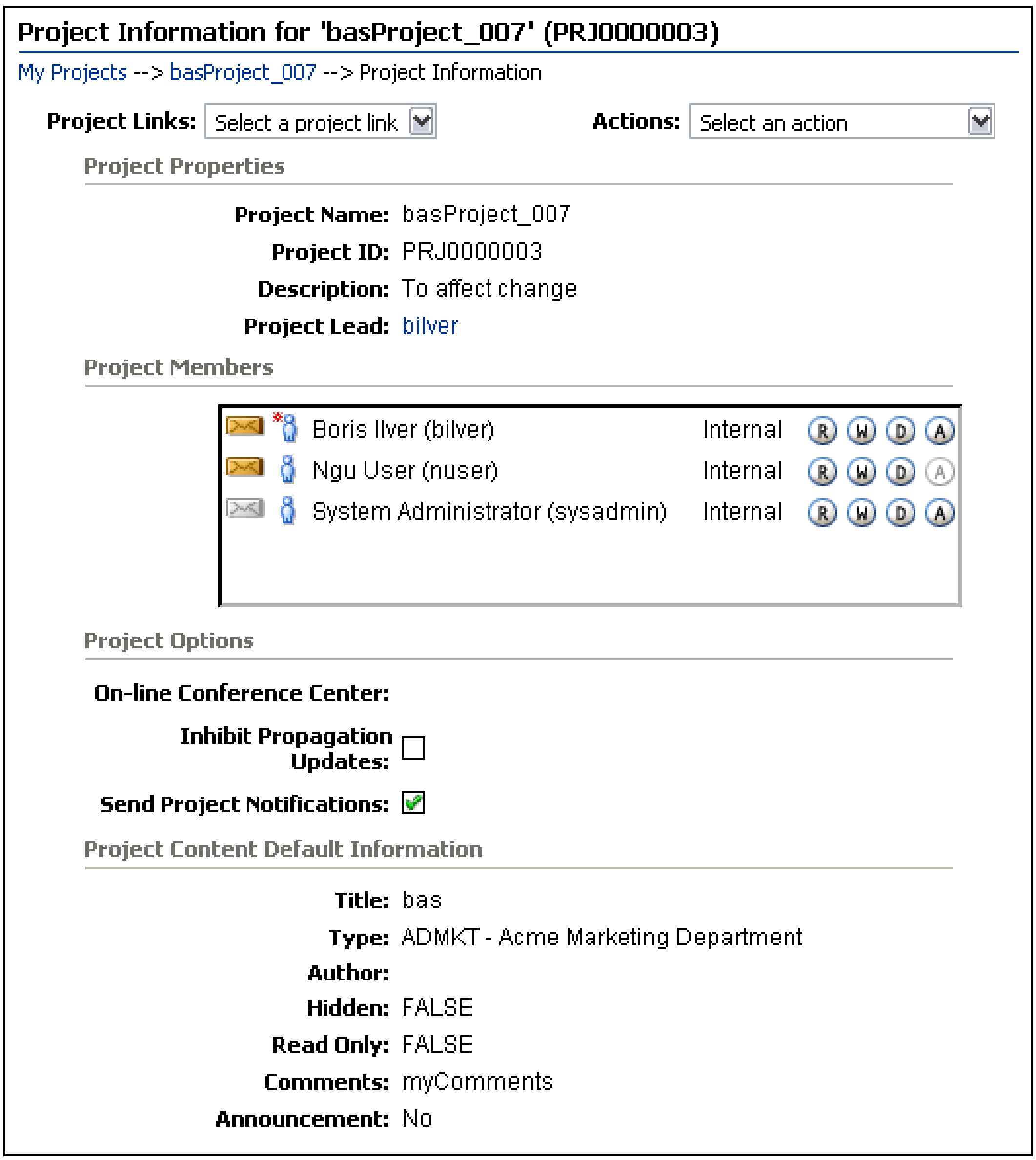
Exploring "<*folder_name*>" Page



The Exploring “<*folder_name*>” page is displayed when you click a folder name in a search results listing or under the project folder in the My Projects or Collaboration Projects folder in the tray area. It lists all folders and content within the specific folder.

The Exploring “<*project_name*>” page is an example of the type of folders search results page format that is used in the Folders component user interface. The table columns are identical to those used on the Exploring "<project_name>" Page (page 3-25).

Project Information for '<*project_name*>' Page



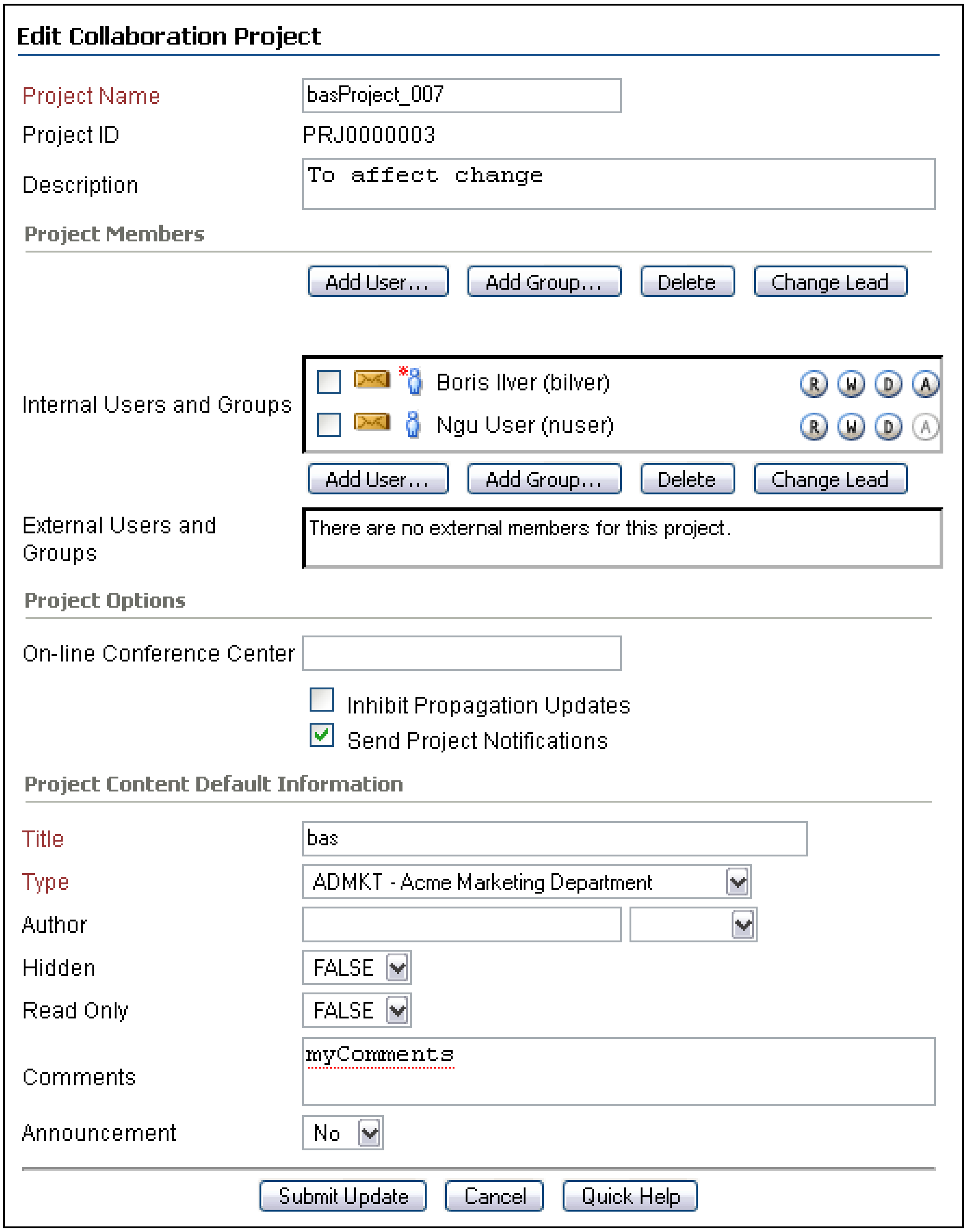
The Project Information for '*<project_name>*' page is displayed when you click the information icon in the actions column of the Collaboration Projects Page (page 3-21) or the Exploring "My Projects" Page (page 3-22). It is also displayed if you select Project Information from the page Actions menu of a Exploring "<project_name>" Page (page 3-25).

Feature	Description
Page Properties Section	
Project Name	The name of the project established at the time the project is created.
Project ID	A unique identifier used by Content Server.
Description	The description of the project established at the time the project is created.
Project Lead	The name of the project member specified as the project lead. The project lead is specified at the time a project is created, and can be changed using the Add/ Edit Collaboration Project Page (page 3-31). Click the name of the project lead to open a new e-mail address to the project lead.
Project Members Section	
E-mail Notification Icon	Indicates whether or not a member is to receive e-mail notifications.  A project notification e-mail will be sent to this user or group.  A project notification e-mail will not be sent to this user or group. For more information, see Sending Project Notifications (page 4-13).
Member Icon	Identifies members as individuals, groups, and project leads.
Member Name	The name of the project member or group.
Member Type	Specifies whether a member is internal or external.

Feature	Description
Permissions	Identifies the default permissions assigned to each specific member.
Project Options	
On-line Conference Center	Displays the URL for any on-line conference used by the project. This information is only displayed if the system administrator has enabled the optional on-line conferencing feature.
Inhibit Propagation Updates	Indicates if propagation updates have been inhibited. **Selected**—Metadata propagation is disabled at the project level. **Clear**—Metadata propagation is enabled at the project level.
Send Project Notifications	Indicates if project notifications have been enabled. **Selected**—The capability for Project Notification (page 3-49) e-mails for this project is enabled, but can be disabled per individual users or groups. **Clear**—The capability for Project Notification (page 3-49) e-mails for this project are disabled for all users and groups.
Project Content Default Information	
Title	Indicates a default title for all content added to the project. This title can be overridden at the time that content is added.
Type	Indicates the default type for all content added to the project. This type can be overridden at the time content is added.

Feature	Description
Author	The default author for all content added to the project. **Note:** If a default Author has been assigned, the user must have permission to the project, and all other project members will need Admin permission to check in content using the default Author.
Hidden	Indicates if the content is hidden from the folder view.
Read Only	Indicates if the content can be moved. See the *Folder and WebDAV Guide* for details about read-only fields.
Comments	Indicates a default comment for all content added to the project. Default comments can be overridden at the time that new content is added.
Announcement	Indicates if an announcement regarding new content is displayed on the project dashboard by default. This setting can overridden at the time that new content is added.

Add/Edit Collaboration Project Page



The Add Collaboration Project page is displayed when you select New Project from the Actions menu on either the Exploring "My Projects" Page (page 3-22) or the Collaboration Projects Page (page 3-21).

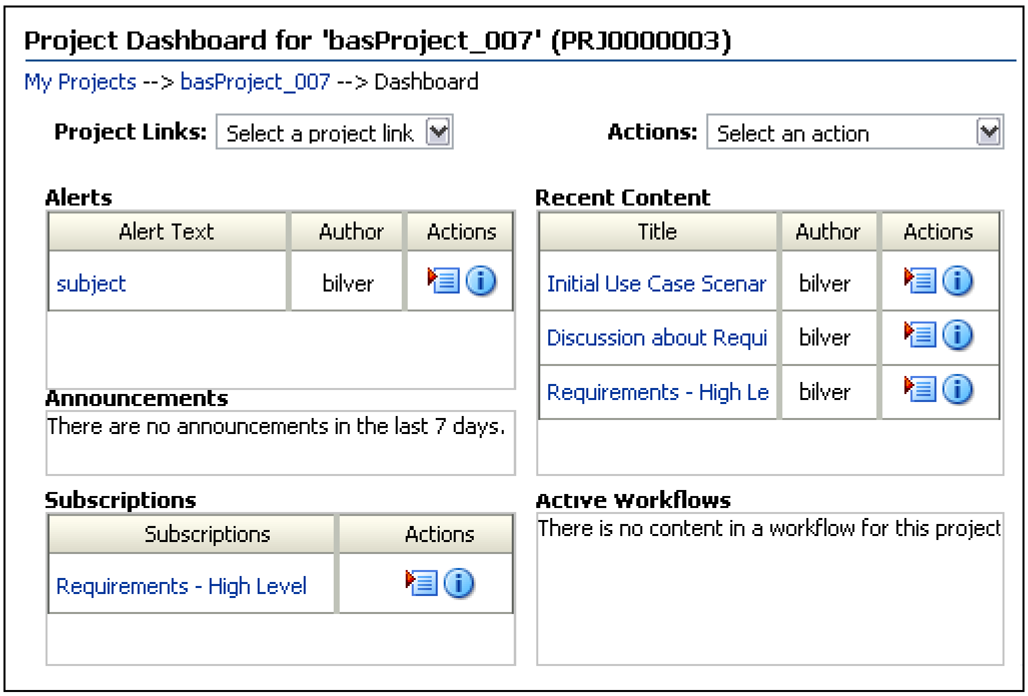
The Edit Collaboration Project page is displayed when you select Update Project Information from the Actions menu on a Project Information for '<project_name>' Page (page 3-27).

Feature	Description
Project Name field	Enter the name of the project.
Description field	Enter a description for the project.
Project Members	Use this portion of the page to assign users and groups to the project, assign permissions, and specify the project lead.
Add User button	Displays the Select User applet for individual users.
Add Group button	Displays the Select Group applet for groups. Note that if you are using Apple Macintosh systems, the Select User applet is not displayed even if this option is enabled. In its place, a popup application is used which has similar functionality.
Users and Groups list s	Used to show the permissions of the users and groups. Selected users and groups will be deleted when the Delete Selected button is clicked, or the selected user will become the project lead when the Change Lead button is clicked. A project notification e-mail will be sent to this user or group. A project notification e-mail will not be sent to this user or group. Member is an individual user. Member is a group. User is the project lead. Clicking a letter toggles the permissions for that user or group.
Delete button	Deletes the selected users and groups from the project.
Change Lead button	Defines the selected user as the project lead.
Project Options	

Feature	Description
On-line Conference Center field	Enter a complete URL for the online meeting web site for the project, if any. See also On-line Conferencing (page 5-5). This field appears only if the system administrator has enabled the optional on-line conferencing feature.
Inhibit Propagation Updates check box	**Selected**—Disables metadata propagation from the project level. (You can still propagate from subfolders in the project.) **Clear—**Enables metadata propagation from the project level.
Send Project Notifications check box	**Selected**—Enables all Project Notification (page 3-49) e-mails for this project. **Clear—**Disables project notification e-mails for this project. Notifications can be disabled for individual users and groups.
Project Content Default Information Default information specifies information that will be assigned by default to content items checked into the project. ❖ Default metadata values are applied to content items only on initial checkin; these settings do not affect revisions to existing content. ❖ These default metadata values can be overridden by the author during the checkin process.	
Title field	The title for the content.
Type field	The type of content.
Author field	The user who is checking in the file. **Note:** If you assign a default Author, make sure that the user has permission to the project. All other project members will need Admin permission to check in content using the default Author.
Comments field	Notes and additional information about the file. Maximum length is 255 characters.
Hidden field	Specifies if the content is hidden from the folder view.

Feature	Description
Read Only field	Specifies if the content can be moved. See the *Folders and WebDAV Guide* for details about read-only fields.
Announcement	Specifies if an announcement regarding the content should appear on the dashboard.

Project Dashboard for '<*project_name*>' Page



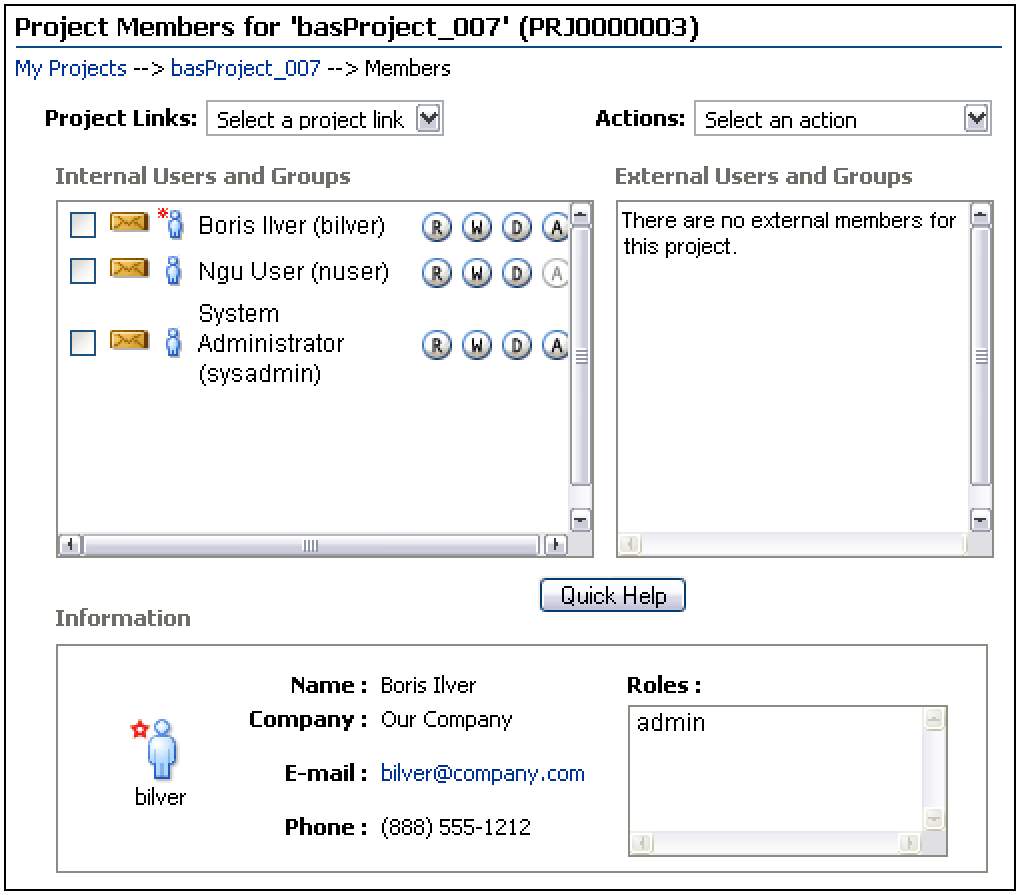
The Project Dashboard for '<*project_name*>' page is accessed by selecting Dashboard from the Project Links menu of any of the project pages. The project pages include:

- Exploring "<project_name>" Page (page 3-25)
- Project Information for '<project_name>' Page (page 3-27)
- Project Discussions for '<project_name>' Page (page 3-38)
- Project Members for '<project_name>' Page (page 3-36)
- Workflows for '<project_name>' Page (page 3-39)

The project dashboard provides a central location to quickly scan for alerts, announcements, recent content, and any active workflows specific to a project.

Page Section	**Description**
Alerts	Alerts are notices about specific discussion posts. You designate a post as a discussion alert by selecting a check box on the post submission form. For more information, see Alerts (page 4-3).
Announcements	Announcements are content items added to the project specified to appear on the Dashboard. Announcements are intended to inform members of information pertinent to the project. For more information, see Announcements (page 4-4).
Subscriptions	The Subscriptions section lists content and discussions for which you have requested notification when they change. For more information, see Subscriptions (page 4-5).
Recent Content	The Recent Content section lists new content items and content item revisions that were recently released for a specific project. For more information, see Recent Content (page 4-7).
Active Workflows	The Active Workflows section lists any content item associated with a project that is currently being routed in a workflow. For more information, see Viewing Active Workflows (page 4-14).

Project Members for '<*project_name*>' Page

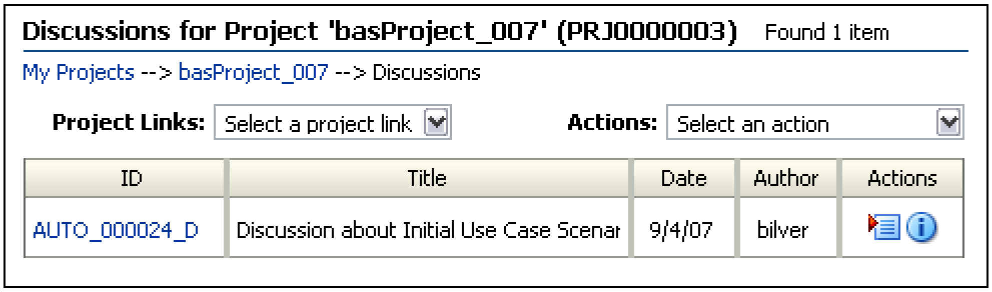


The Project Members for '<*project_name*>' page is accessed by selecting Members from the Project links menu of any of the project pages. The project pages include:

- Exploring "<project_name>" Page (page 3-25)
- Project Information for '<project_name>' Page (page 3-27)
- Project Discussions for '<project_name>' Page (page 3-38)
- Project Dashboard for '<project_name>' Page (page 3-34)
- Workflows for '<project_name>' Page (page 3-39)

Feature	Description
Users and Groups list	Used to show the permissions of the users and groups. Selected users and groups are deleted when the box is checked and the Delete Selected Members option is selected from the Actions menu. A project notification e-mail will be sent to this user or group. A project notification e-mail will not be sent to this user or group. Member is an individual user. Member is a group. User is the project lead. Clicking a button toggles the permissions for that user or group.
Name	The full name of the member.
Company	The organization name of the member.
E-mail	The e-mail address of the member.
Phone	The phone number of the member.
Roles	The roles to which the member belongs.
Actions list (member section)	Includes actions that can be performed: ❖ **Add internal user**— Displays the Select Internal User applet or page. ❖ **Add internal group**—Displays the Select Internal Group applet or page. ❖ **Add external user**—Displays the Select External User applet or page. ❖ **Add external group**—Displays the Select External Group applet or page. ❖ **Delete selected members**—Deletes the selected users and groups from the project.

Project Discussions for '<*project_name*>' Page



The Project Discussions for '<*project_name*>' page is accessed by selecting Discussions from the Project links menu of any of the project pages. The project pages include:

❖ Exploring "<project_name>" Page (page 3-25)

❖ Project Information for '<project_name>' Page (page 3-27)

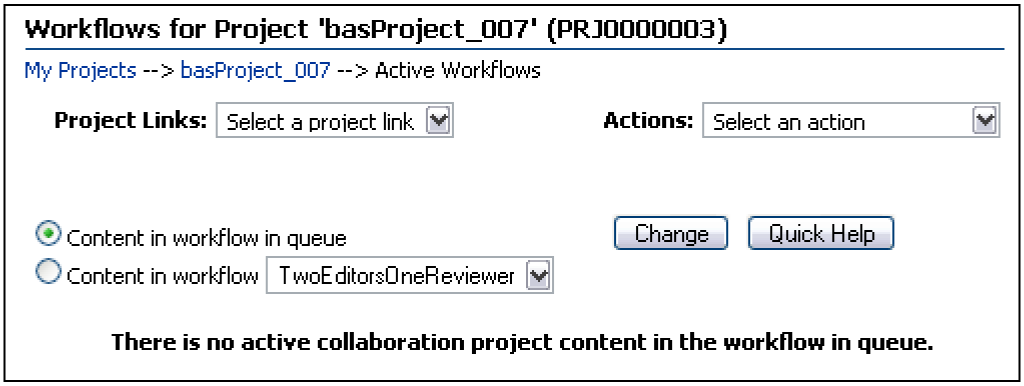
❖ Project Members for '<project_name>' Page (page 3-36)

❖ Project Dashboard for '<project_name>' Page (page 3-34)

❖ Workflows for '<project_name>' Page (page 3-39)

Feature	Description
ID column	Clicking the content ID of a selected item displays the discussion document.
Title column	Displays the title of the discussion document.
Date column	Displays the date that the discussion started.
Author column	Displays the author of the content item.
Actions column	❖ **Actions icon** **:** lists available actions for the item. ❖ **Info icon** **:** Displays the Information page for the item.

Workflows for '<*project_name*>' Page



The Workflows for '<*project_name*>' page is accessed by selecting Active Workflows from the Project links menu of any of the project pages. The project pages include:

- Exploring "<project_name>" Page (page 3-25)
- Project Information for '<project_name>' Page (page 3-27)
- Project Members for '<project_name>' Page (page 3-36)
- Project Dashboard for '<project_name>' Page (page 3-34)
- Project Discussions for '<project_name>' Page (page 3-38)

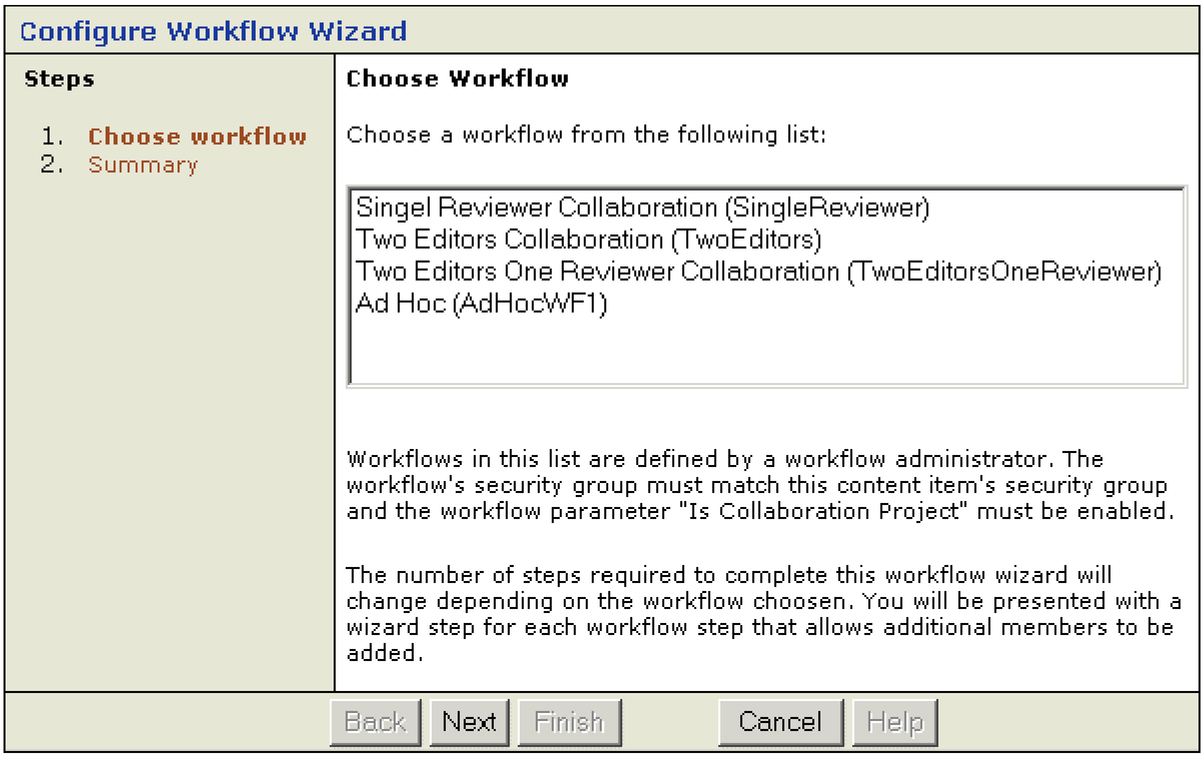
Feature	Description
Content in workflow in queue	Displays the collaboration project content items that are in your workflow queue.
Content in workflow	Displays the collaboration project content items in the specified workflow.
Change	Dynamically changes the resulting display based on which of the previous options are selected.
Actions list	Displays the available actions.

Workflow Wizard

The Workflow Wizard initiates when you click the **Selected Workflow "Configure"** button on the Content Check In Form (Project) Page (page 4-9). It consists of three pages:

1. Configure Workflow Wizard (page 3-40)
2. Workflow Step Reviewer Page (page 3-41)
3. Workflow Summary Page (page 3-42)

Configure Workflow Wizard



The Configure Workflow Wizard page is used to select a workflow sequence for a revision when adding content to a project. To display this page, select the **Selected Workflow “Configure”** button on the Content Check In Form (Project) Page (page 4-9).

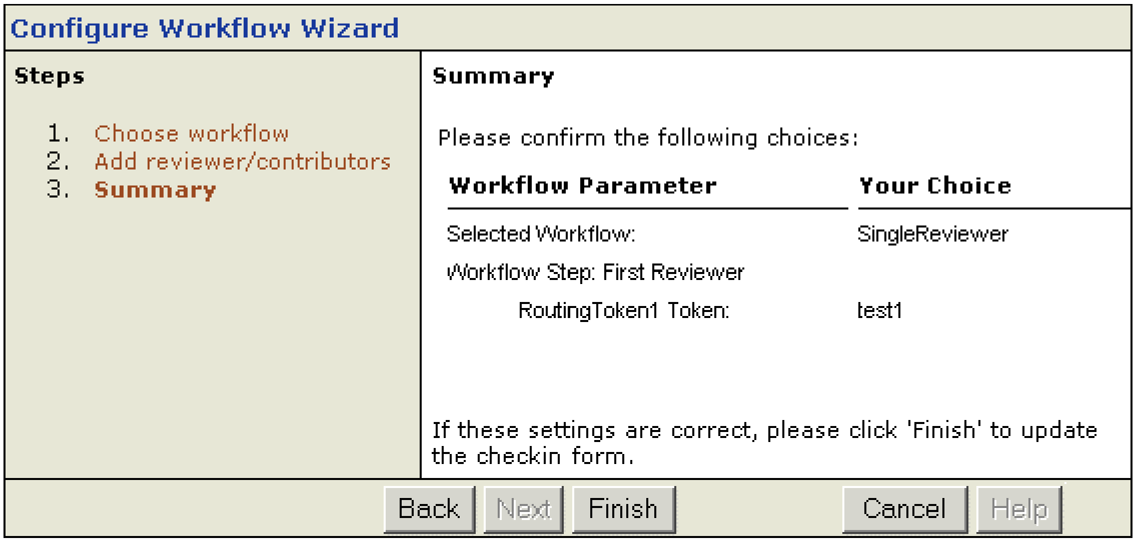
Screen Side	Description
Left Pane	Shows the current step (boldface) and the number of steps required to complete the workflow wizard. After you have selected a workflow and clicked next, the number of wizard steps will change to reflect the number of workflow steps where the user can specify other members (steps that have routing tokens).

Screen Side	Description
Right Pane	Corresponds to the current workflow step.

Workflow Step Reviewer Page

The Workflow Step Reviewer page is used to select workflow reviewers for a revision when adding content to a project. To access this page, select a workflow from the list and click the **Next** button on the Configure Workflow Wizard (page 3-40).

Workflow Summary Page

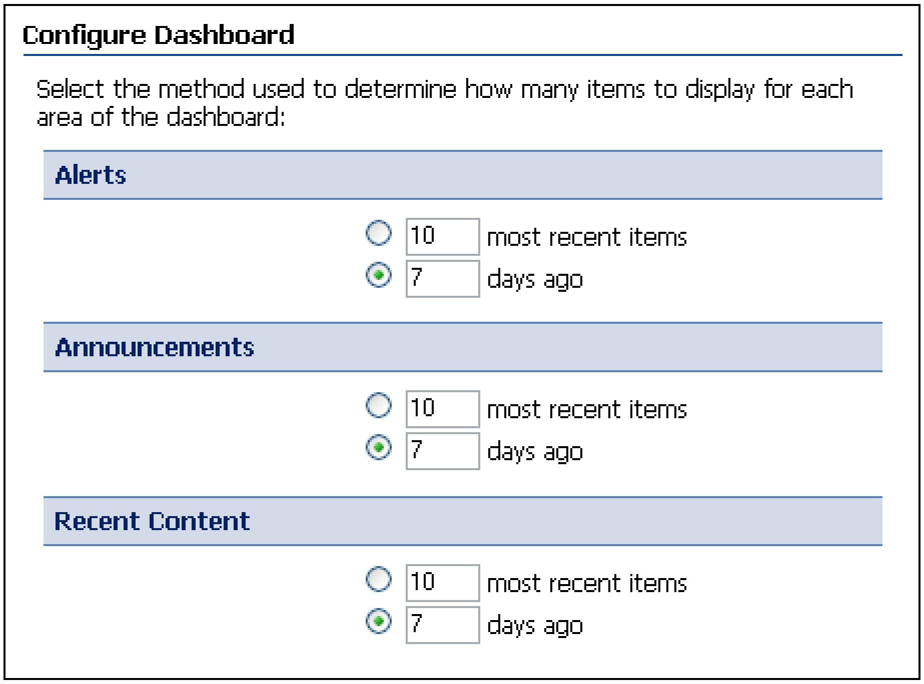


The Workflow Summary page is used to show the reviewers and workflow sequence for the workflow.

To access this page, select the **Next** button on the Workflow Step Reviewer Page (page 3-41).

Note: This summary does not show all steps in a workflow, only those that have routing tokens.

Configure Dashboard Page

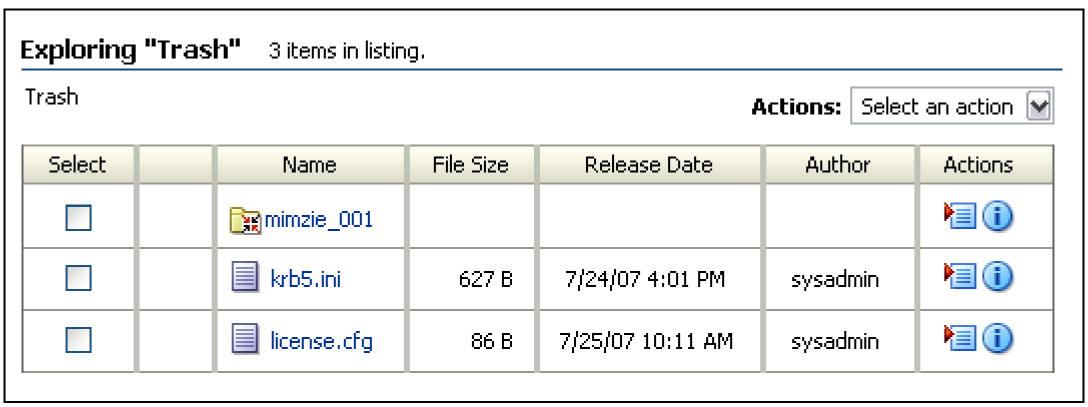


The Configure Dashboard page is displayed when you click Configure Dashboard in the Collaboration Preferences folder on the My Content Server tray. It is also displayed when you select Configure Dashboard from the page Actions menu on the Project Dashboard for '<project_name>' Page (page 3-34).

Feature	Description
Alerts	Specifies how alerts from discussions are displayed. **Most recent items**—Displays the last *X* alerts. **Days ago**—Displays all alerts submitted within the last *X* days.
Announcements	Specifies how announcements are displayed **Most recent items**—Displays the last *X* announcements. **Days ago**—Displays all announcements submitted within the last *X* days.

Feature	Description
Recent Content	Specifies how content items are displayed in the Adding New Content (page 4-10). **Most recent items**—Displays the last *X* content items. **Days ago**—Displays all content items submitted within the last *X* days.
Update button	Saves changes to the Dashboard settings and returns to the dashboard.
Reset button	Resets the options to the last saved settings.

Exploring "Trash" Page



The Exploring "Trash" Page is used to work with content that is set for temporary or permanent removal.

Tasks

The Exploring Trash page is used for:

- Deleting Projects, Folders and Content Items (page 3-18)
- Permanently Deleting from Trash (page 3-19)
- Restoring from Trash (page 3-19)

If you selected the **Remove items immediately when deleted** check box in the Folder Configuration page items are permanently deleted rather than moved to the Exploring Trash page.

Note: Shortcuts do not get moved to the Trash. Deleting a shortcut from the Content page permanently deletes it. (However, shortcuts within deleted folders will be restored if the parent folder is restored.)

The Exploring “Trash” page, is accessed by clicking the **Trash** link in the Browse Content tray. It is used to work with content that is set for temporary or permanent removal. For example:

- Deleting Projects, Folders and Content Items (page 3-18)
- Permanently Deleting from Trash (page 3-19)
- Restoring from Trash (page 3-19)

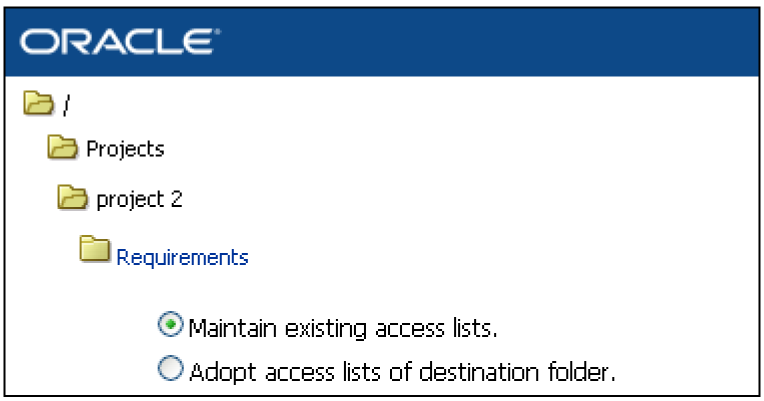
If you selected the **Remove items immediately when deleted** check box in the Folder Configuration page items are permanently deleted rather than moved to the Exploring Trash page.

Note: Shortcuts do not get moved to the Trash. Deleting a shortcut from the Content page permanently deletes it. (However, shortcuts within deleted folders will be restored if the parent folder is restored.)

Feature	Description
Select check boxes	**Selected**—When multiple items are selected, actions from the pull-down Actions menu can be applied to all selected items. **Clear**—Actions can be performed on the individual item by selection the Actions list on the item’s information line.
Name	Lists the name of items that are temporarily deleted. This lists displays all deleted items or only the items you have deleted. The information displayed is set according to the user’s Folder Configurations.
Size	File size.
Date	The date the content item was moved to the trash.
Author	The content item author.

Feature	Description
Actions	❖ **Actions icon ():** lists available actions for the item. ❖ **Info icon ():** Displays the Information page for the item The available actions depend on the type of item.

Browsing Window



The Browsing Window is functionality installed as part of the Folders component. It is used to move both folders or content items, and is accessed in one of three ways:

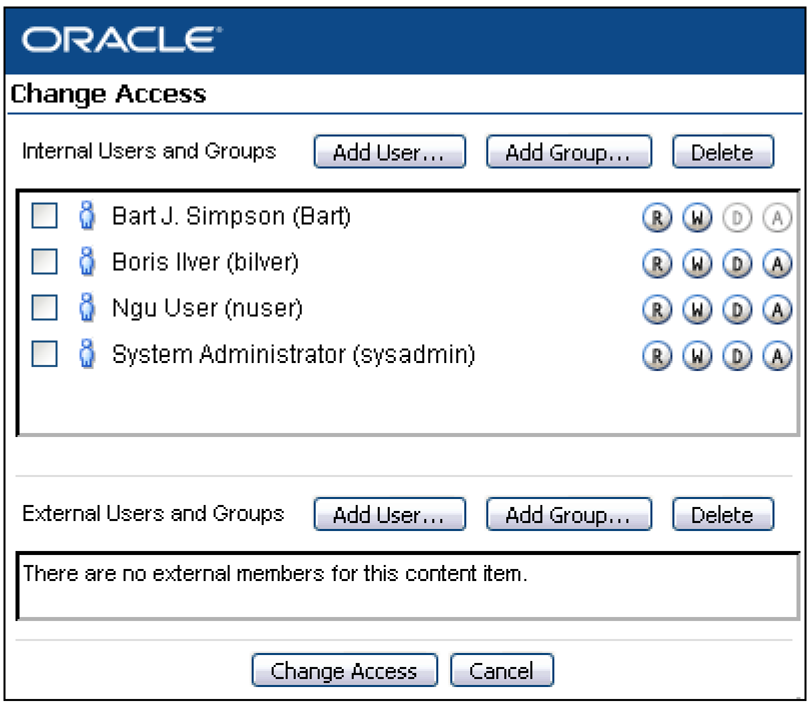
- Selecting Move from the item action menu of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26). Can be used to move both folders and content.
- Enabling the check box in the Select column of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26) and selecting Move from the page Actions menu. Can be used to move both folders and content.
- The Browsing window is also accessed for moving only content items by clicking Browse next to the Folder field on the Content Server Info Update Form page. Can be used to move content only.

For more information, see the *Folders and WebDAV User Guide* and the *Content Server User Guide.*

Feature	Description
Folder Hierarchy	This displays the virtual folders created in a project as a hierarchical structure. Click the folder icon to move to the desired folder.

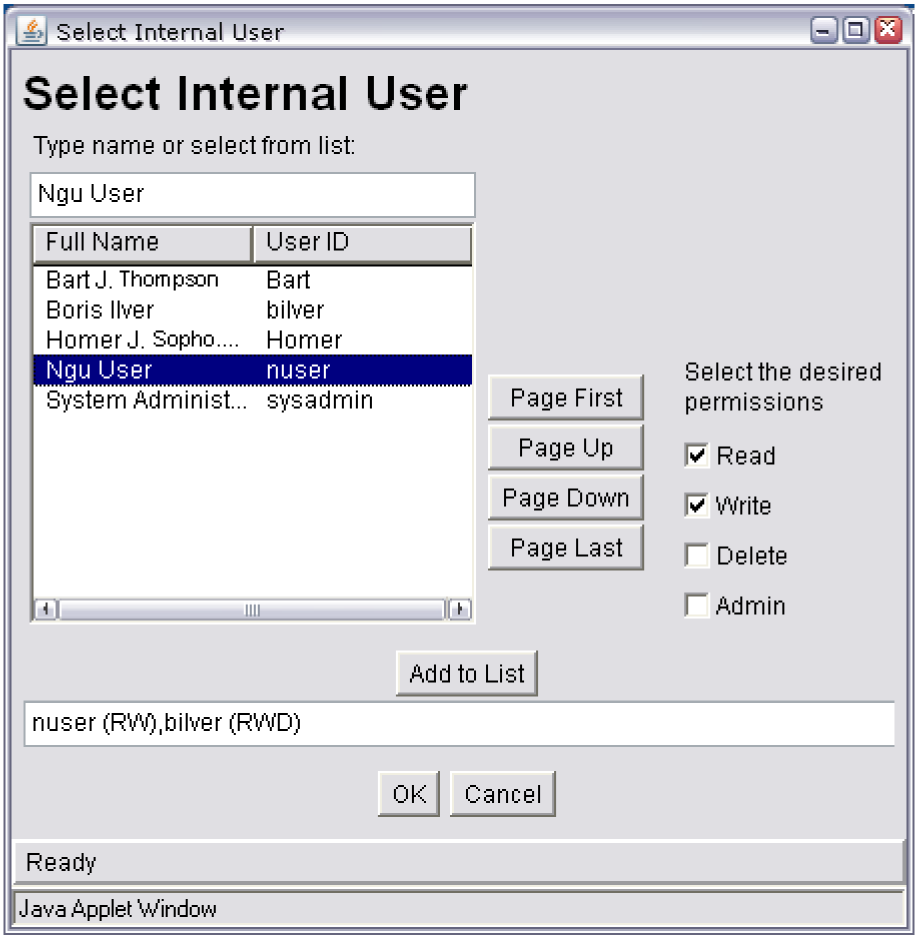
Feature	Description
Maintain existing access lists	Enabling this keeps the access permissions to the folder or content item as they were prior to the move.
Adopt access lists of destination folder	Enabling this changes the access permissions for the folder or content item to those of the destination folder.

Change Access Page

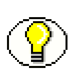


The Change Access Page is accessed by clicking the Modify Access button next to the Collaboration Project field on either the Content Server Info Update Form (for content items) or the Hierarchy Folder Configuration page (for virtual folders.) It is another way to manage users and their permissions to projects, folders, and content items.

Select User/Groups Screen



The Select User/Groups screens are used to assign users and groups to the project, as well as designate their permissions.



Note: Users must have access to the *Project* security group before being assigned to a project. Contact your system administrator .

Feature	Description
Name entry field	Typing letters jumps to the first matching entry in the first column.

Feature	Description
User or group list	Select the user or group to be added to the project. All users and groups defined for the Collaboration Manager instance are listed. **Note:** Selecting a user in the user or group list does not add them to the project until the Add to List button is clicked.
Page First button	Goes to the top of the list.
Page Up button	Scrolls one page up in the list.
Page Down button	Scrolls one page down in the list.
Page Last button	Goes to the bottom of the list.
Permission check boxes	Clicking a check box toggles the permissions.
Add to List button	Adds the selected user or group with the selected permissions to the Member list field.
Member list field	Lists the users or groups that will be added to the project, along with their permissions. • You can delete users and groups and edit permissions in this field. • If a user or group is listed more than once in this field, the permissions assigned to the first entry will be applied. • If a user or group listed in this field is already a member of the project, the permissions assigned in this field will be applied to the existing user.
OK button	Adds the users or groups listed in the Member list field to the project.

Project Notification

The Project Notification automatically notifies users that they have been assigned to a project. This page is e-mailed to you when you are designated as a member of a new project or when you are added to an existing project. The notification message is sent in HTML by default, but you can change the message format to plain text in your User Profile page.

The project creator or a user who adds members to a project can disable project notifications for specific users and groups. See Adding a Project (page 3-12) and Updating Project Information (page 3-13).

A user who has permission to change project members can send project notifications from the Members page. See Sending Project Notifications (page 4-13).

Chapter

4

WORKING WITH PROJECT LINKS

OVERVIEW

Project Links enable you to view dynamic information about the current project. To display project links, use the Project Links Menu (page 2-4) on any current project page. The project pages include:

❖ Project Information for '<project_name>' Page (page 3-27)

❖ Project Dashboard for '<project_name>' Page (page 3-34)

❖ Exploring "<project_name>" Page (page 3-25)

❖ Project Members for '<project_name>' Page (page 3-36)

❖ Project Discussions for '<project_name>' Page (page 3-38)

❖ Workflows for '<project_name>' Page (page 3-39)

The following major access points are available into a project:

❖ Project Information. Project Information is a project link with substantial functionality, and is described in Chapter 5 (*Working with Project Information)*.

❖ Dashboard (page 4-2)

❖ Project Content (page 4-8)

❖ Members (page 4-11)

❖ Discussions (page 4-13)

❖ Viewing Active Workflows (page 4-14)

The **Add/Remove from My Projects** and **Search this Project** actions are available from each project page in the page Actions menu. To search within an existing project, see Searching within a Project (page 5-7).

DASHBOARD

Note: The information displayed throughout the Collaboration Manager interface depends on the permissions you have been given in the project. Users with Administrative permission will see information that other users do not see.

The dashboard provides a central place where you can view dynamic information about the current project.

Access

To display the dashboard, select Dashboard from the project link menu on any project page.

Panes and Configuration

The Dashboard includes the following panes:

- Alerts (page 4-3)
- Announcements (page 4-4)
- Subscriptions (page 4-5)
- Recent Content (page 4-7)
- Viewing Active Workflows (page 4-14)

To configure the Dashboard, click the Configure Dashboard (page 4-2) link in the Collaboration Preferences folder of the My Content Server tray, or select the Configure Dashboard option in the page Action menu of the Dashboard project page. See Project Content (page 4-8), for more information.

Configure Dashboard

You can set the number of discussion alerts, announcements, and new content items that are displayed on the Dashboard. These settings are associated with your user login, so all projects will have the same Dashboard settings.

Tasks

The Configure Dashboard Page (page 3-43) is used to set the number of discussion alerts, announcements, and new content items that are displayed on the Dashboard.

Access

Click **Configure Dashboard** in the Collaboration Preferences folder of the My Content Server tray, or select the Configure Dashboard option in the page Action menu of the Dashboard project page.

Alerts

Alerts are notices about specific discussion posts. You designate a post as a discussion alert by selecting a check box on the post submission form.

This section covers these topics:

- Alerts on the Dashboard (page 4-3)
- Creating a Discussion Alert (page 4-4)
- Removing a Discussion Alert from the List (page 4-4)
- Viewing a Discussion (page 4-4)

Alerts on the Dashboard

You can specify how many alerts to display on the Dashboard by adjusting settings on the Configure Dashboard Page (page 3-43).

The following information about Alerts appears on the Dashboard:

Feature	Description
Alert Text	The subject of the alert.
Author	Shows the author of the post.
Actions	❖ **Actions icon** : lists available actions for the item. ❖ **Info icon** : Displays the Content Information page for the discussion.

Creating a Discussion Alert

To create a discussion alert, select the **Display as Alert** check box when you are adding a post to a discussion. The alert appears on the Dashboard page according to your Configure Dashboard (page 4-2) settings.

Removing a Discussion Alert from the List

The system automatically removes any discussion alerts according to your Configure Dashboard (page 4-2) settings. If you add another post to a discussion containing an alert and do not check the **Display as Alert** checkbox, the alert is removed from the document.

Viewing a Discussion

To view an alert's discussion document, click on the **Alert** listing. To view discussions for the project, select **Discussions** from the Project Dashboard for '<project_name>' Page (page 3-34) Project Links Menu (page 2-4). The Project Discussions for '<project_name>' Page (page 3-38) is displayed.

Announcements

Announcements are content items that appear on the Dashboard for the associated project.

This section covers these topics:

Announcements on the Dashboard

You can specify if a content item is an announcement when you check the item into Content Server. You can specify how many announcements to display in the Announcements pane by setting options on the Configure Dashboard Page (page 3-43).

The following information about Announcements appears on the Dashboard:

Feature	Description
Title	Shows the title of the announcement. Clicking the title displays the web-viewable content item or provides an option to download the native file.
Author	The content author.
Actions	❖ **Actions icon** **:** lists available actions for the item. ❖ **Info icon** **:** Displays the Content Information page.

Creating an Announcement

To create an announcement, select **yes** in the Announcement field on the Content Check In Form (Project) Page (page 4-9) when checking in a new item. The announcement appears in the Announcements section of the Dashboard.

Removing an Announcement from the List

The system automatically removes any announcements according to your Configure Dashboard (page 4-2) settings. You cannot remove an announcement from the list manually. You can update the metadata field for the announcement and change it to **no**; that causes the item to not appear in the list.

Viewing an Announcement and its Information

To view an announcement, click the Title link of the Announcement. The web-viewable file of the content item is displayed or the native file is available for download.

To view information about an announcement, click the Info icon . The Content Information page for the announcement is displayed.

Subscriptions

Subscriptions enable you to be notified whenever specific content items are revised or posts are submitted to discussions.

This section covers these topics:

- Subscriptions on the Dashboard (page 4-6)
- Subscribe to “Document Name” Page (page 4-6)

❖ Subscribing to an Item, Folder, or Project (page 5-6)

Subscriptions on the Dashboard

In addition to standard Content Server subscription functionality, Collaboration Manager provides the following additional functionality:

❖ If you subscribe to a folder or project, you are notified when any content item in that folder or project is revised, or when a message is posted to any discussion in that folder or project. You cannot unsubscribe from any individual content items or discussions in a folder subscription or project subscription.

❖ Subscribing to a discussion notifies you when a new message is posted.

The following information about Subscriptions appears on the Dashboard:

Field	Description
Subscriptions column	Displays the Title of the content item. Clicking the Title link displays the web-viewable file or prompts you to download the native file.
Actions column	❖ **Actions icon :** lists available actions for the item. ❖ **Info icon :** Displays the Content Information page.

Subscribe to “Document Name” Page

Access

To access this page, click the Info icon for a content item and then select **Subscribe** from the actions list.

Feature	Description
Subscribe (Item)	Subscribes you to the discussion item.
Subscribe (Related Groups)	Actions ❖ Subscription Info: Displays the Subscription Info page. ❖ Subscribe: Subscribes you to the group of discussions listed.

Subscribing to Content

For more information about subscribing to content, folders, and projects, refer to Subscribing to an Item, Folder, or Project (page 5-6).

Subscribing to a Discussion

To subscribe to a project discussion, perform these tasks:

1. Find the discussion to subscribe to.
2. Click the Info icon. The Discussion Info Page (page 7-6) is displayed.
3. Select **Subscribe** from the Actions list. The Subscribe to “Document Name” Page (page 4-6) is displayed.
4. Click **Subscribe**.

Recent Content

Recent content includes new content items and content item revisions that were recently released for a specific project.

This section covers these topics:

- ❖ Recent Content on the Dashboard (page 4-7)
- ❖ Viewing Updated Content and Content Information (page 4-8)
- ❖ Removing New Content Items from the List (page 4-8)

Recent Content on the Dashboard

You can specify how many new revisions to display in the New Content pane by setting options on the Configure Dashboard Page (page 3-43).

Tasks

The Recent Content listing is used to perform the following tasks:

- ❖ View content items that were recently checked in.
- ❖ View information about a new content item.
- ❖ Check out a new content item.
- ❖ Get a copy of a new content item’s native file.

- View the project and folder for a new content item.

  Note: New content items remain in the list according to your Configure Dashboard (page 4-2) settings.

The following information about Recent Content appears on the Dashboard:

Feature	Description
Title column	Displays the title of a content item.
Author column	Displays the author of the content item.
Actions column	Includes the Info icon and the Actions Menu icon. **Info**— Displays the Content Information page for the selected content item. **Actions Menu**—Contains the actions available.

Viewing Updated Content and Content Information

To view a content item, click the title of the content item. The web-viewable file is displayed or you are prompted to download the native file.

To view information about a content item, click the Get Info icon .

Removing New Content Items from the List

The system automatically removes any content items from the Recent Content pane according to your Configure Dashboard (page 4-2) settings. You cannot remove a content item from the list manually.

PROJECT CONTENT

Project content is any folder or content item associated with a specific project. Content is associated with a project when it is checked into Content Server using the Content Check In Form (Project) Page (page 4-9). Project content can be checked into the top-level project folder, or into subfolders created within a project. You can also access information about or work with specific content through project pages, or through standard Content Server search results pages.

Tasks

This section covers these topics:

- ❖ Content Check In Form (Project) Page (page 4-9)
- ❖ Adding New Content (page 4-10)
- ❖ Moving Content (page 4-10)
- ❖ Deleting Content (page 4-10)
- ❖ Opening a Web Folder (page 4-10)

Access

Clicking on a project name displays the Exploring "<project_name>" Page (page 3-25). Clicking a folder name displays the Exploring "<folder_name>" Page (page 3-26). Use the page Action menu to access the options used in this section.

Content Check In Form (Project) Page

Tasks

This section covers these topics:

- ❖ Adding New Content (page 4-10)

Access

Select **New Content** from the Page Actions Menu (page 2-5) of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26). Notice the metadata fields are the same as those for checking content into Content Server, however in this case, the content is checked into the specified project or project folder also.

Feature	Description
Collaboration Project	Read-only field determined by the folder into which the content item is added. As such, this field is updated automatically whenever the folder is changed.
Selected Workflow	Enables you to specify a workflow to route the content through. For more information, refer to Configure Workflow Wizard (page 3-40).

Other features are available on standard Content Server Check in pages. For more information, see the *Content Server User Guide*.

Adding a New Folder

To add a new folder, select **New Folder** from the Page Actions Menu (page 2-5) of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26). The Hierarchy Folder Configuration Page is displayed. Complete the Hierarchy Folder page, and click **Save**. For more information about the Hierarchy Folder page, see the *Folders and WebDAV User Guide.*

Adding New Content

To add new content, select **New Content** from the Page Actions Menu (page 2-5) of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26). Complete the Content Check in Form (Project), and click **Check In**. The content is checked into the specified project.

Moving Content

You can move both folders or content items using the Browsing Window (page 3-46) in one of two ways:

❖ Selecting Move from the item action menu of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26).

❖ Enabling the check box in the Select column of either the Exploring "<project_name>" Page (page 3-25) or the Exploring "<folder_name>" Page (page 3-26) and selecting Move from the page Actions menu.

The Browsing window is also accessed for moving only content items by clicking Browse next to the Folder field on the Content Server Info Update Form page. For more information, see the *Folders and WebDAV User Guide* and the *Content Server User Guide.*

Deleting Content

To delete content, refer to About Deletions (page 3-17).

Opening a Web Folder

If your system administrator has enabled WebDAV, you can open virtual folders of a project using Internet Explorer. To open a web folder, select **Open Web Folder** from the page Actions menu. The available web folders are displayed. Select the appropriate folder. If WebDAV is not enabled, then the Open Web Folder option is not available in the page Actions menu.

MEMBERS

Tasks

Use the Project Members for '<project_name>' Page (page 3-36) to perform these tasks:

- Viewing Project Member Information (page 4-11)
- Adding Internal/External Users/Groups (page 4-11)
- Deleting Selected Members (page 4-12)
- Sending An E-mail Message To a Member (page 4-12)
- Sending Project Notifications (page 4-13)

Access

The Members link opens the Project Members for '<project_name>' Page (page 3-36).

Viewing Project Member Information

To view information about a project member:

1. Display the project for which you want to display member information. See Viewing a Project (page 3-15).
2. Click the **Members** Project Link. The Project Members for '<project_name>' Page (page 3-36) is displayed.
3. Click the name of a project member. The member is highlighted when it is selected and information about the user or group is displayed in the Information pane.

Adding Internal/External Users/Groups

Tech Tip: It is often easiest and best to add new members to an existing project team by adding members to existing groups. This reduces confusion about permissions.

To add internal/external users/groups to an existing project:

1. From the Project Members for '<project_name>' Page (page 3-36), select the page action **Add internal/external users/group**. The Select User/Groups Screen (page 3-48) is displayed.
2. Type a name or select from the list, and click **Add to List**. If you do not click Add to List, the selected user is not added as a member to the project.
3. Click **OK**.
4. Click **Update**.

Note: If you add members to a project, they do not automatically receive permission to any of the existing folders, content items, or discussions in that project. To assign permission to items in the project, you can either:

- Use the Metadata Propagation function to copy member information from the project to subfolders and content within the project.
- Assign access to each individual item in the project as appropriate.

Deleting Selected Members

Tech Tip: It is often easiest and best to delete members from an existing project team by deleting members from existing groups. This reduces confusion about permissions.

To delete selected members from a project:

1. From the Project Members for '<project_name>' Page (page 3-36), click the check box next to the members to be deleted.
2. Select the page action **Delete selected members.** A confirmation message is displayed.
3. Click **OK.**

Sending An E-mail Message To a Member

To send an e-mail message to an individual project member:

1. From the Project Members for '<project_name>' Page (page 3-36), display the user's information.
2. Click the e-mail link**.** Your e-mail program opens with a new e-mail message addressed to the user.

Note: You cannot send an e-mail message to a group.

Sending Project Notifications

To send a Project Notification (page 3-49) from the Project Members for “name” page:

1. Display the project for which you want to send the project notification.
2. Make sure that project notifications are enabled for the project. See Updating Project Information (page 3-13).
3. Activate the project notification setting for the members to whom you want to send a new project notification e-mail:
   - If the Change Mail Notification icon is inactive , click the icon.
   - If the Change Mail Notification icon is active , click the icon, click **Update**, click the Change Mail Notification icon again, and click **Update** again.

   A red border identifies settings that have been changed, and an Update button appears.
4. Click **Update**. Your changes are saved and the Update button disappears. A project notification e-mail will be sent to all indicated members, even if they previously received one for the current project.

Discussions

Discussions are topic-specific threads managed by project within Content Server. See Chapter 7 (*Working with Discussions)* for more information and tasks on discussions.

This section covers these topics:

❖ Project Discussions for '<project_name>' Page (page 3-38)

❖ Removing a Discussion Alert from the List (page 4-4)

❖ Viewing a Discussion (page 4-4)

Viewing Discussions for a Project

Tasks

The Project Discussions for '<project_name>' Page (page 3-38) is used to view discussion posts.

Access

To access the Project Discussions for '<project_name>' page, select Discussion from a Project Links menu on an project page. Project pages include:

- ❖ Project Information for '<project_name>' Page (page 3-27)
- ❖ Project Dashboard for '<project_name>' Page (page 3-34)
- ❖ Exploring "<project_name>" Page (page 3-25)
- ❖ Project Members for '<project_name>' Page (page 3-36)
- ❖ Project Discussions for '<project_name>' Page (page 3-38)
- ❖ Workflows for '<project_name>' Page (page 3-39)

VIEWING ACTIVE WORKFLOWS

The Workflows for '<project_name>' Page (page 3-39) lists content items in the associated project that are currently in a workflow.

Workflows for Project “name” Page

Tasks

Use this page to perform these tasks:

- ❖ Viewing a Workflow Item (page 4-14)
- ❖ Removing a Workflow Item from the List (page 4-14)
- ❖ Viewing Information About a Workflow Item (page 4-15)

See Chapter 8 (*Using the Workflow Wizard)* for more information on workflows.

Access

To access this page, click the Active Workflows project link from a project page.

Viewing a Workflow Item

To view a content item from the Workflows for Project “name” Page (page 4-14), click the Content ID of the content item. The web-viewable file is displayed or the native file is made available for download.

Removing a Workflow Item from the List

You cannot remove a workflow item from the Workflows for Project “name” Page (page 4-14). Workflow items will be removed automatically when they are released to the system.

Viewing Information About a Workflow Item

To view content information about a content item from the Workflows for Project “name” Page (page 4-14), click Content Info in the Action column.

Chapter

5

WORKING WITH PROJECT INFORMATION

OVERVIEW

The Project Information for '<project_name>' Page (page 3-27) is much like the standard Content Information page in that it displays basic information and provides you with the opportunities to update some of the basic metadata and perform other tasks associated with content. In addition to the standard Content Server functionality, Collaboration Manager provides you with options to perform these tasks:

- Viewing Project Information (page 5-2)
- Updating Project Information (page 3-13)
- Working with Propagation (page 5-3)
- Sending E-Mail to a Project Lead (page 5-4)
- On-line Conferencing (page 5-5)
- Working with Subscriptions (page 5-5)

Access

To access the Project Information for '<project_name>' Page (page 3-27), select the Project Information project link on any project page. Project pages include:

- Project Information for '<project_name>' Page (page 3-27)
- Project Dashboard for '<project_name>' Page (page 3-34)
- Exploring "<project_name>" Page (page 3-25)

- Project Members for '<project_name>' Page (page 3-36)
- Project Discussions for '<project_name>' Page (page 3-38)
- Workflows for '<project_name>' Page (page 3-39)

VIEWING PROJECT INFORMATION

To view information about a project from a search results page, such as the Collaboration Projects Page (page 3-21), Exploring "My Projects" Page (page 3-22), or Find Projects Results Page (page 3-24), select **Project Information** from the Item Action menu or click the Info icon . The Project Information for '<project_name>' Page (page 3-27) is displayed.

To view information about a project from the Exploring "<project_name>" Page (page 3-25), select **Project Information** from the page Actions menu. The Project Information for '<project_name>' Page (page 3-27) is displayed.

For information about updating project information, see Updating Project Information (page 3-13).

EXPORTING A PROJECT ARCHIVE

Once a collaboration project is completed, you can choose to formally wrap up the content by exporting it as a content server archive collection. This creates a collection file, which is easy to back up.

Note: You must have Admin permission for the project to be able to export an archive. This procedure exports only the project and folder structure; it does not archive content items or discussions. To export content items and discussions, use the Archiver application.

To export the project structure as a content server archive collection:

1. Access the Project Information page for the project.
2. From the page Actions menu, click **Export Archive**. A File Download window is displayed.
3. Click **Save**. A Save As window is displayed.
4. Navigate to and select the directory where you want to save the archive.
5. Click **Save**. The archive collection (*archive_collection.hda* file) is saved to the specified location.

Note: To import an exported project archive, you must use the Import function in the Folders component administration interface. For more information, see the *Folders/ WebDAV Component Guide*.

Working with Propagation

The *Propagate* action enables contributors with Admin rights to copy default metadata values from parent folders, including project folders, to subfolders and content items.

This section contains the following topics:

- About Metadata Propagation (page 5-3)
- Propagating Metadata (page 5-4)

About Metadata Propagation

Typical uses for this function include:

- After adding members to a project, you want to add them to the folders and content items within that project.
- After moving a large number of content items to a new folder structure, you want to apply the top-level folder's default metadata to all subfolders and content items.
- You revised the default metadata for a folder, and you want to apply it to subfolders and content items within that folder.

The propagation action applies each folder's metadata to all "uninhibited" subfolders and content items within those folders. This means that each uninhibited subfolder and content item will inherit the metadata of the folder from which propagation was launched.

You can inhibit items by selecting the *Inhibit Propagation Updates* check box for a project or folder, or by setting the *Inhibit Metadata Update* field to *true* for a content item. See Adding a Project (page 3-12) for more information.

When you inhibit a folder, it is not affected by metadata propagation from a higher-level folder. However, you can still launch metadata propagation *from* an inhibited folder.

The system administrator selects which metadata fields are included in propagation. This is a system-wide setting. Make sure that you know which fields are enabled for propagation before launching the process.

Contributors launch the propagation process from the Project Information for '<project_name>' Page (page 3-27), or Hierarchical Folder Information page. See Propagating Metadata (page 5-4) for more information, as well as the *Folders and WebDAV User Guide*.

If a folder metadata field does not have a value defined, subfolders and content items within that folder will not inherit the "blank" value during propagation; any existing metadata values will stay intact for these items.

Propagating Metadata

Caution: This procedure replaces metadata values for subfolders and content items that are not identified as “inhibited,” and there is no “undo.” **Be extremely careful when propagating metadata so that you do not accidentally change values you meant to keep.**

Caution: The system administrator selects which metadata fields are included in propagation. (This is a system-wide setting.) Make sure that you know which fields are enabled for propagation before launching the process.

When you launch metadata propagation, only the folders and content items for which you have permission will be affected:

- Only folders for which you have Write permission will be affected.
- Only content items for which you have Read permission to the folder and Write permission to the content item will be affected

To copy metadata from a project to its subfolders and content items:

1. Display the Project Information for '<project_name>' Page (page 3-27) for the project from which you want to propagate metadata.
2. Select **Propagate** from page Actions menu. The metadata values defined for the current folder are copied to any uninhibited subfolders and content items within those folders.

To copy metadata from a folder to its subfolders and content items:

1. Display the Hierarchical Folder Information page for the folder from which you want to propagate metadata.
2. Select **Propagate** from page Actions menu. The metadata values defined for the current folder are copied to any uninhibited subfolders and content items within those folders.

SENDING E-MAIL TO A PROJECT LEAD

To send an e-mail message to a project lead, click the name of the Project Lead on the Project Information for '<project_name>' Page (page 3-27). A blank e-mail form from your designated e-mail client launches.

Subscribing/Unsubscribing from a Project

When you subscribe to a project, you receive a Subscription Notification when any content item in that project is revised, or when a message is posted to any discussion in that project.

- To subscribe to a project, see Subscribing to an Item, Folder, or Project (page 5-6).
- To unsubscribe from a project, see Unsubscribing from an Item, Folder, or Project (page 5-6).

Note: You cannot unsubscribe from any individual content items or discussions in a project subscription.

ON-LINE CONFERENCING

On-line conferencing is an optional feature that enables you to link to an online meeting web site, such as WebEx or PlaceWare.

If your system administrator has enabled this feature and a web site has been specified for the project, an **On-line Conferencing** link will be displayed at the bottom of the Project Information page. Clicking this link displays the online meeting web site for the current project.

WORKING WITH SUBSCRIPTIONS

This section covers these topics:

Note: For information about subscribing to a discussion, see Subscribing to a Discussion (page 4-7).

About Subscriptions

Subscriptions enable you to be notified whenever specific projects are revised or posts are submitted to discussions.

- If you subscribe to a folder or project, you are notified when any content item in that folder or project is revised, or when a message is posted to any discussion in that folder or project. You cannot unsubscribe from any individual content items or discussions in a folder subscription or project subscription.

- Subscribing to a discussion notifies you when a new message is posted. See Subscribing to a Discussion (page 4-7).

Subscription Notification Page

Tasks

The Subscription Notification Page is used to perform the following tasks:

- Subscribing to an Item, Folder, or Project (page 5-6)
- Unsubscribing from an Item, Folder, or Project (page 5-6)
- Viewing a subscribed discussion. See Viewing Discussion Information (page 7-11).

Access

The Subscription Notification page is e-mailed to you when a content item you have subscribed to is revised or a post is submitted to a discussion you have subscribed to. By default, all notification messages are sent in HTML format, but you can change the message format to plain text in the User Profile page. The email includes links to view the content information for the page or the content itself.

Subscribing to an Item, Folder, or Project

Note: For a criteria subscription, the system administrator subscribes to items for you.

To subscribe to a content item or discussion from the Content Information page:

1. Display the Content Information page for the content item or discussion you want to subscribe to.
2. Click **Subscribe** in the Action menu. The Subscribe to “Content Title” page is displayed.
3. Click **Subscribe**. A Subscription Notification Page (page 5-6) e-mail is delivered to you every time the selected content item is revised or any time a post is submitted to the selected discussion.

Unsubscribing from an Item, Folder, or Project

To unsubscribe from a content item or discussion from the Content Information page:

1. Display the Content Information page for the content item or discussion you want to unsubscribe from.

2. Select **Unsubscribe** from the page Action menu.
3. Click **Unsubscribe** from the displayed page. Your subscription is canceled.

    Note: You cannot unsubscribe from any individual content items or discussions in a folder subscription, project subscription, or criteria subscription.

SEARCHING WITHIN A PROJECT

You can access the Search Within Project page from various project-specific action menus and most project-specific project links.

To search within a project, perform these tasks:

1. Access the Project Information for '<project_name>' Page (page 3-27) for the project.
2. Select **Search this Project** from the page Actions menu. The Search within Project "<*project_name*>" page is displayed. This is a standard Content Server search form with additional metadata field pertinent to projects.
3. Complete the metadata fields, and click **Search**.

Chapter

6

USING THE FOLDERS COMPONENT

OVERVIEW

The Folders component provides a hierarchical folder interface to content in Content Server. The component is required for Collaboration Manager, WebDAV functionality, and the Oracle WebDAV Client product.

This chapter covers the following topics:

- Virtual Folders (page 6-1)
- Local Folders (page 6-3)

This chapter provides an overview of folder use but does not provide details. See the documentation provided with the Folders and WebDAV component for details on using folders.

VIRTUAL FOLDERS

When the Folders component is enabled, a new **Contribution Folders** link appears in the *Browse Content* tray. Clicking this link displays the top-level Folder Exploring Page and expanding the link displays links to the Folder Exploring Page for each of the top-level folders in the hierarchy.

In addition, when the Folders component is enabled, a **Folder Configuration for *User*** link appears in the **My Content Server** tray and on the User Profile page.

The Folders component sets up an interface to the content server in the form of "virtual folders" (also called "hierarchical folders"). Virtual folders enable you to create a multi-level folder structure.

Virtual folders provide two main benefits:

- Users can find content by drilling down through a familiar folder-type interface.
- Users can apply default metadata to content items by checking them in through a particular folder.

Structure

The following structure is used for the Folders component:

- Each content server instance has a common set of virtual folders. Any change to the folders is applied system-wide.
- There is one default system-level folder, called *Contribution Folders*.
  - If the Trash function was enabled during installation, a system-level folder called *Trash* is also created.
  - If you are using Collaboration Manager or a custom folders interface, folders for these products may also appear at the system level of the Folders hierarchy.
- Each folder in the hierarchy contains content items that have the same numerical “Folder” value, which is assigned automatically upon creation of the folder. Changing the value of the Folder field for a content item places it in a different folder.

Folder Metadata Inheritance

When you create a new folder, the metadata from the parent folder populates the fields for the new folder. This allows the folder to initially “inherit” metadata, but still allows you to make changes to the new folder.

Subsequent changes to a parent folder’s metadata do not affect the metadata for existing subfolders.

Default Metadata

When a file is checked into Content Server through a virtual folder, metadata default values are entered on the Content Check In Form page automatically. Metadata default values are evaluated in the following order:

Tech Tip: If you leave the **Title** field blank, the file name will be used as the title.

1. **Virtual folder default values**
   When you click the Check In Content icon on an Exploring page, any content default metadata values defined for that virtual folder are entered on the Content Check In Form page. These values are defined on the Add/Edit Hierarchy Folder Configuration page.

2. **User default metadata values**
   If any content metadata defaults are not defined for the virtual folder, the user's default metadata values are applied. These values are defined by each user for new content items on their Default Field Information Configuration page, and for revised content items on their Revision Information Field Configuration page.
3. **System default metadata values**
   The system default values are applied to any fields that are not defined by the virtual folder or the user's default metadata. These values are defined by the system administrator.
4. **None**
   A metadata field can be blank as long as it is not a required field. If a required field is left blank, an error will occur and the content item will not be checked in.

LOCAL FOLDERS

The "Local Folders" function enables you to map a content server folder structure to a local file system. Changes to the folder, its subfolders, and content items in the content server are reflected in the local directory.

One possible use for this function is to manage a web site in the content server but then replicate its structure to a local drive so that hyperlinks are not broken. Because individual files are stored in the content server according to security groups and content types, hyperlinks between web pages would be broken if users attempted to navigate directly from the content items. Also, users would be required to log in and have the appropriate permissions to view each web page.

The following scenario describes how this function could be used to manage a web site:

1. A web designer creates a web site that contains several web pages with internal hyperlinking in a multi-level directory structure.
2. Through a WebDAV client, the designer copies the entire web site structure to a content server folder called *WebSite*.
3. On the content server Local Folders page, the *WebSite* folder is mapped to a directory on a shared drive, *Z:/Intranet*.
4. The *Intranet* directory is set up as a web server virtual directory.
5. Users can access the web site from the *Z:/Intranet* directory without logging in to the content server. Web pages can be updated in the content server, and they will be replicated to the local directory automatically.

About Local Folders

- Content server security does not apply to folders or content items in the local directory.
- Only content items with a status of “Released” will appear in the local directory. Items that fail conversion, are still being indexed, are in a workflow, or have a future release date will not be available in the local directory.
- Only the latest revision of a content item will be available in the local directory.
- Modifying directories or files directly in the local file system can cause problems with the local folder mapping. All changes should be made through the content server Folders interface.
- If you want only users who belong to a certain security group to access certain files, you can point local directories to *weblayout* secured directories.

See the *Folders and WebDAV Administration Guide* and the *Folders and WebDAV User Guide* for details on folder use.

Chapter

7

WORKING WITH DISCUSSIONS

OVERVIEW

This section covers these topics:

Concepts

Interface

Tasks

About Discussions

Discussions enable project members to comment on folders and content items in a threaded discussion environment. Discussions provide searchable, secure, traceable records of workgroup communication that allow you to alert others to pertinent posts, and subscribe to discussions you want to follow closely.

All discussions are created as content items in the Content Server system. Therefore, a discussion has metadata associated with it, and you can search for and work with discussions much as you do with content items.

This section covers these topics:

Discussion Types

There are two types of discussions:

- **Content item discussions** are associated with a particular content item.
- **Folder discussions** are associated with a particular folder.

Discussion Structure

All discussions have a hierarchical structure. A discussion hierarchy can have an unlimited number of levels, but there are only three elements in the discussion structure:

- A **discussion** is the top-level element. Discussions contain threads and posts. Some discussions may be alerts too.
- A **thread** is the middle level element. Threads are major topics within a discussion. Each thread has an initial post associated with it. When you reply to a thread post, the new post is displayed as a sub-level of the thread.
- A **post** is the lowest level element. A post consists of a topic and a text message. When you reply to a post, the new post is displayed as a sub-level of the original post.

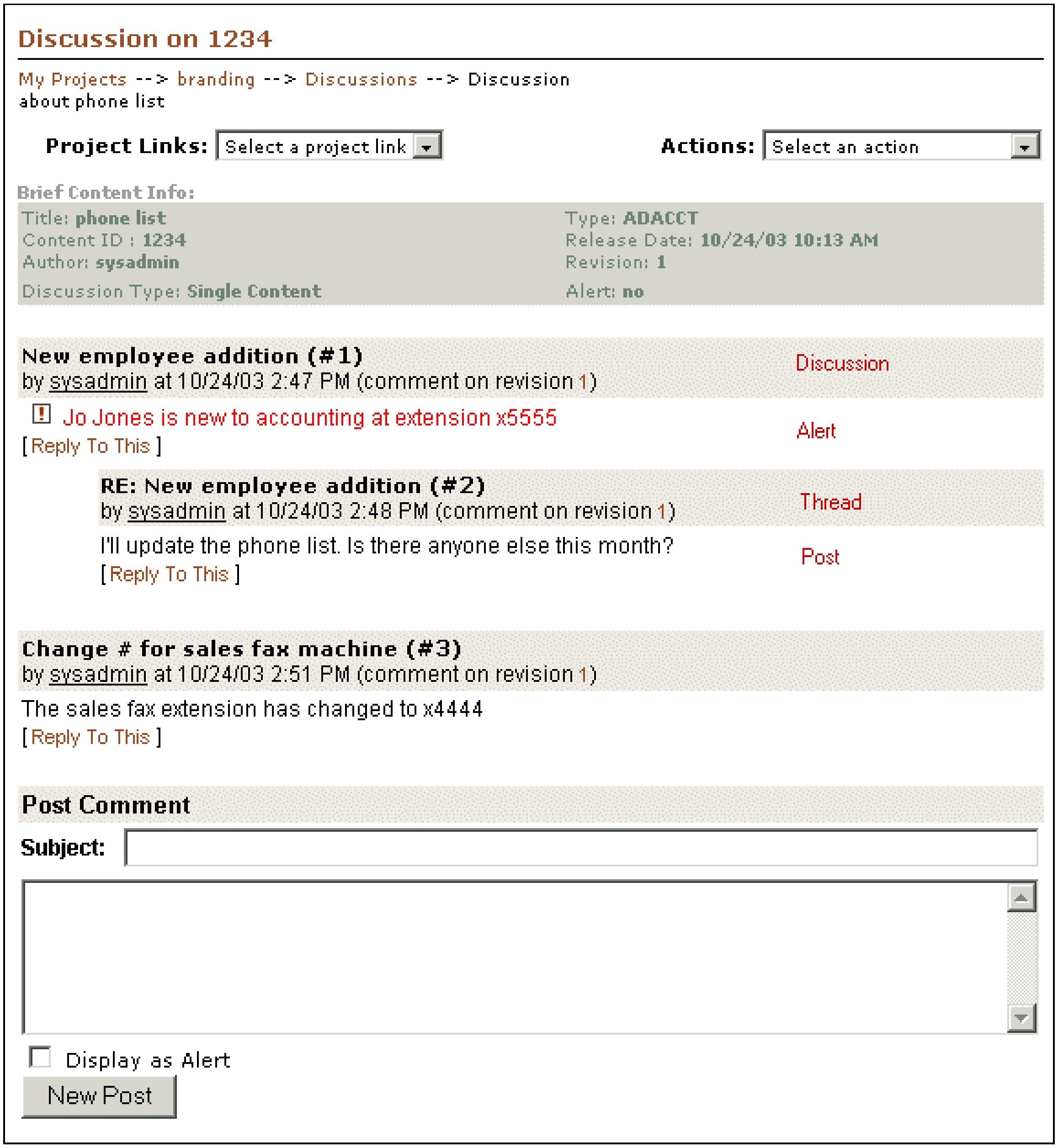
Posts and Threads

Discussions follow content through all revisions. Each discussion post conveniently lists the revision number of the content to which it refers, so you do not need to view the content information of previous revisions in order to post to a discussion.

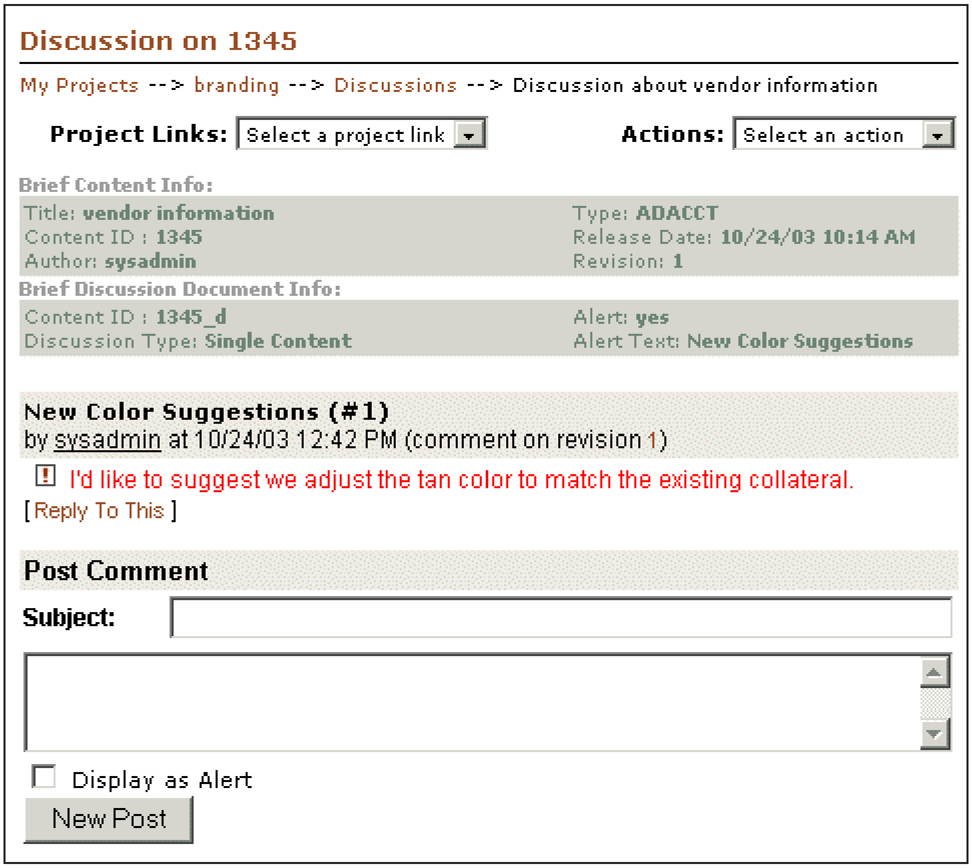
Unlike other documents in the content server, edits to a discussion do not create new revisions of the discussion content itself; that is, the .hscp form that contains the discussion. When you check in a content item and begin a discussion thread about the content, the component creates a form (hscp) for the discussion, gives the content the same ID as the content with "_d" appended, associates the discussion content with the content item, and automatically checks in the discussion content for you behind the scenes. The Revision History for discussion content is always Revision [1]. The revision number does not increment for discussion content.

Each top level represents a thread. Posting number one (#1) and posting number three (#3) are threads. The reply (#2) to thread number one represents a post within a thread.

Figure 7-1 Discussion Threads



Post Comment Form



Use this form to post a comment on a content item, or to post a reply on content that already has a discussion initiated. The Post Comment Form can be accessed from numerous popup menus and links. You can initiate a discussion with this form from the following links:

- the Create Discussion actions on the Content Information page
- the Create Discussion link on the Workflow Review page
- the Create Discussion popup menu option on the Search Results page and the Exploring "My Projects" Page (page 3-22). (Applicable to Headline and Thumbnail Views only. The Create Discussion popup menu is not available on the Classic View).

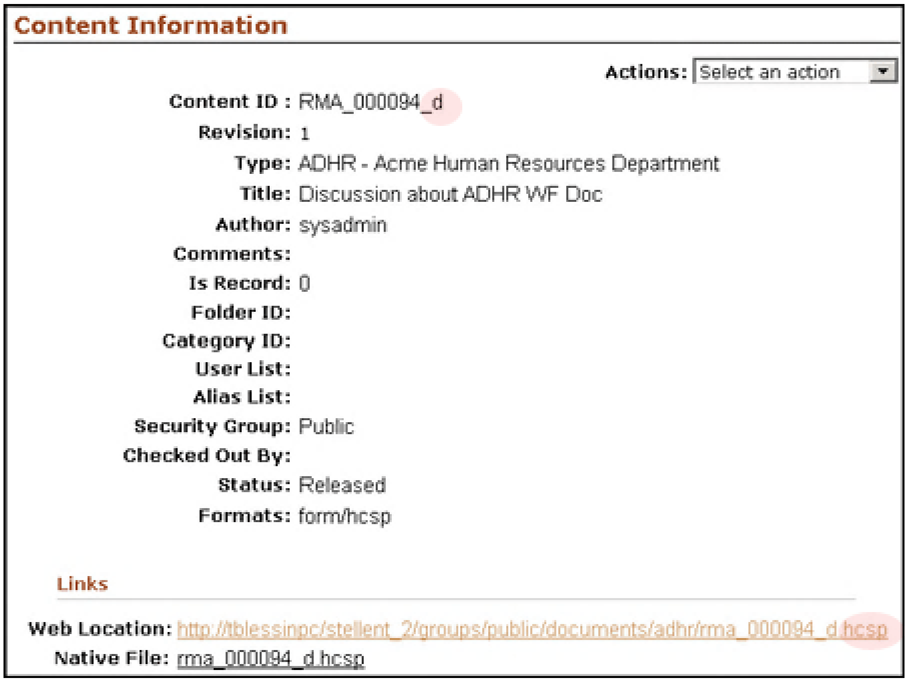
After a discussion has been initiated, the Print View action is available from the pull-down menu.

DISCUSSION INFO PAGE

The Discussion Info Page is a brief summary page about a discussion. This page is only for content type that is a discussion, as denoted by the “_d” suffix in the Content ID.

You can access the Post Comment Form for the discussion thread by clicking the **Web Location** link, which accesses the Threaded Discussion (hcsp) form.

Content Information Page



The Content Information Page contains the additional Discussion field when the Threaded Discussions component is installed and enabled.

The Content Information Page for content that is a discussion itself does not contain the Discussion link, because it is the discussion.

Working with Discussions

This section covers these topics:

- Initiating a Discussion (page 7-8)
- Viewing a Threaded Discussion (page 7-10)
- Replying to a Posting (page 7-10)
- Printing a Threaded Discussion (page 7-11)
- Viewing Discussion Information (page 7-11)
- Copying a Discussion URL (page 7-11)
- Subscribing to and Unsubscribing from a Discussion (page 7-12)

Initiating a Discussion

You can add a discussion:

From the Content Information Page

Use this procedure to initiate a discussion on a piece of content you are checking in. You initiate the discussion from the Content Information page.

To initiate a discussion:

1. From the main menu, click **New Check In**. The Content Check In Form is displayed.
2. Check in the content item with the desired criteria. On the Check In Confirmation page, click the **[Content Info]** link. The Content Information page is displayed.
3. In the Links area, click the **Create Discussion** link. The Post Comment page is displayed.
4. Enter a subject for the posting in the **Subject** box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Page (Brief Content Info page) displays the new post.

From the Search Results Page

Use this procedure to initiate or enter a discussion in progress from the Search Results page. You must be using the Thumbnail or Headline View in order to enable the Actions list in the Search Results page. If you are using the thumbnail view, then you can click the icon for a discussion to access the discussion.

To initiate a discussion:

1. From the main menu, click **Search**. The Advanced Search page is displayed.
2. Enter any search metadata fields to narrow your search, such as Discussion Type=N/A, and click **Search**. Your search results are displayed.
3. In the Actions list for the content you want to discuss, click the **Create Discussion** link in the popup menu. The Post Comment page is displayed.

4. Enter a subject for the posting in the **Subject** box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Page (Brief Content Info page) displays the new post.

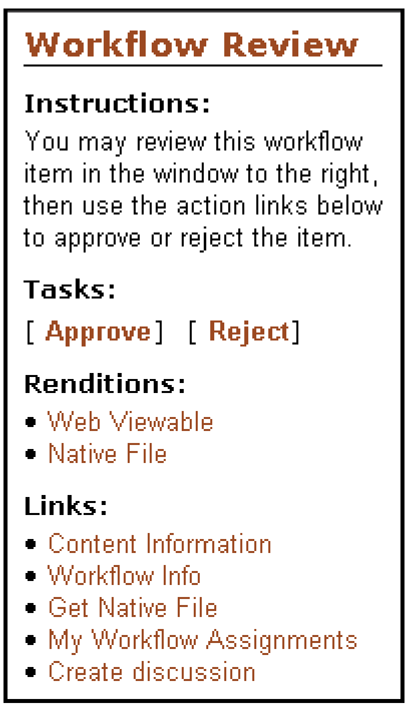
From the Workflow Review Page

Use this procedure to initiate a discussion on a piece of content in your workflow. You initiate the discussion from the Workflow Review page.

To initiate a discussion about a workflow document:

1. Open your My Content Server Tray and click the **My Workflow Assignments** link. The Workflow in Queue page is displayed.
2. In the Actions column, click the Workflow Review  icon. The Workflow Review page is displayed.

Figure 7-2 Workflow Review Page



3. In the Links list, click the **Create Discussion** link. The Post Comment page is displayed.
4. Enter a subject for the posting in the **Subject** box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Page (Brief Content Info page) displays the new post.

Viewing a Threaded Discussion

Users with read permissions can view the messages within a threaded discussion, but only those who can edit the content can post messages.You can access an existing discussion from the following links:

- the Go to discussion link on the Content Information pages
- the Discuss This Item link on the Workflow Review or Search Results page
- the Web Location link on the Discussion Info page
- the Content ID link of a discussion on the Search Results page
- the Discussion page for a project
- the Dashboard for a project

The Discussion link indicates how many discussion posts have been created for the document. The figure above shows that content ID “tt02_d” has 5 items in the discussion. The number of items is generated by the Discussion Count custom information field.

To view a discussion thread:

1. Click **Search** from the navigation bar. The Advanced Search page is displayed.
2. Search for the content for which you want to view the discussion. In the **Discussion Type** field, make sure you select **N/A**. Click **Search**. The search results are displayed.
3. In the row for the content you want to view, click the Content Info link or icon. The Content Information page is displayed.
4. In the Links area, click the **Go to Discussion** link to go to the discussion. The Brief Content Info screen is displayed.

Replying to a Posting

Use this procedure to reply to a post in a threaded discussion. When you respond to a post, a new post is created directly underneath the selected post to which you are replying.

To reply to a post:

1. Click **Search** from the navigation bar. The Advanced Search page is displayed.

2. Search for the content you want to discuss in a thread. In the **Discussion Type** field, make sure you select **N/A**. Click **Search**.
3. Click the Content Info link or icon. The Content Information page is displayed.
4. In the Links area, click the **Go to Discussion** link to go to the discussion. The Brief Content Info screen is displayed.
5. In the posting thread you want to participate in, click the **Reply To This** link.
6. Enter your reply in the comments text box and click **Post Reply**. Your posting is added to the discussion.

Printing a Threaded Discussion

Use this procedure to print a threaded discussion.

To print a threaded discussion:

1. Click **Search** from the navigation bar. The Advanced Search page is displayed.
2. Search for the discussion thread. In the **Discussion Type** field, make sure you select **Single Content** and click **Search**. The Search Results page is displayed.
3. In the **ID** column of the Search Results, click the ID of the discussion thread. The ID should have an "underscore_d" suffix. The discussion thread opens.
4. Select the **[Print View]** option from the Actions list. The discussion is displayed in a print view in another browser window.
5. Click the Printer icon on your browser window.

Viewing Discussion Information

You can view the Discussion Info Page (page 7-6) for any discussion by clicking the Info icon from the following locations:

- ❖ Exploring Project page (Discussion content item selected)
- ❖ Discussion for Project "name" page.

Copying a Discussion URL

To copy the URL for a web-viewable file to the clipboard:

1. Display the Discussion Info Page (page 7-6) for the discussion.

2. Click the Copy Web Location to Clipboard icon .

   The URL is copied to the clipboard so you can paste it to another location.

Subscribing to and Unsubscribing from a Discussion

When you subscribe to a discussion, you receive a subscription notification every time a post is submitted to the discussion.

❖ To subscribe to a discussion, see Subscribing to an Item, Folder, or Project (page 5-6).

❖ To unsubscribe from a discussion, see Unsubscribing from an Item, Folder, or Project (page 5-6).

Deleting a Post

You cannot delete an individual post from a discussion.

Deleting a Threaded Discussion

Use this procedure to delete a threaded discussion. You must have delete permission for the content in order to delete the discussion.

To delete a discussion:

1. In the Search results page, click the Content Item info link for the discussion you want to delete. The Discussion Info Page is displayed.
2. Click the **[Full Info]** link. The Content Information Page is displayed.
3. In the Revision History area, click **Delete** in the Actions column. The system prompts you to confirm the delete.
4. Click OK. A message indicates the revision has been successfully deleted from Collaboration Manager.

Searching with the Discussion Type Field

You can use the Discussion Type metadata field to narrow your search criteria when searching documents.The Discussion Type search field allows you to refine a search for content associated with discussions. The discussion type options are:

- **N/A—**A search is applied to all documents whether or not any discussions are associated. A search returns content both with and without a discussion, but does not return any content that is a discussion itself. That is, content IDs with an underscore "_d" are excluded from the search.
- **Single Content—**A search is applied to documents that have a discussion focused on a single content item. A search using this option returns the discussion content itself; that is, a search using this option returns only content that is a discussion. Only content IDs with an underscore "_d" are included in the search results.
- **Folder—**A search is applied to content that has a discussion focused on the folder-level. A search using this option returns the discussion content itself; that is, a search using this option returns only content that is a discussion. Only content IDs with an underscore "_d" are included in the search results.

Note: If you do not select any criteria for Discussion Type, all content with or without discussions are displayed, including the discussion content itself.

Searching for Content that is a Discussion

Use this procedure to search only for content that is a discussion associated with a single content item. The content results are the discussions themselves. The discussion thread content has a content ID with the underscore "_d" suffix.

To search for content that is a discussion:

1. In the search page, select **Discussion Type—Single Content**.
2. Click **Search**. Only the content that is a discussion is displayed.

Searching for Content that is not a Discussion

Use this procedure to search for content that may or may not have a discussion associated with it. This search does not return any discussion content; that is, any content with a "_d" suffix in the Content ID.

To search for content that is not a discussion:

1. In the search page, select **Discussion Type—N/A**.
2. Click **Search**. The results contain content with or without associated discussions, but do not include content that actually is a discussion.

SENDING E-MAIL

To send an e-mail message to the user who submitted a post:

1. Display the post in the Discussion window. See Viewing a Threaded Discussion (page 7-10).
2. Click the **Posted By** link. Your e-mail program opens with a new e-mail message addressed to the user who submitted the post.

Chapter

8

USING THE WORKFLOW WIZARD

OVERVIEW

This section covers these topics:

Note: For more information about workflows refer to Viewing Active Workflows (page 4-14) and the *Content Server Workflow Implementation Guide*.

ABOUT WORKFLOWS

Workflows in Collaboration Manager are similar to workflows in content server. For more information, refer to the *Content Server User Guide*. In addition to the standard content server workflow functionality, in Collaboration Manager, the system administrator sets up collaboration workflow routing templates for authors to choose from upon check in. Notifications, approvals and rejections, and general processes remain the same as those used in content server.

STARTING A WORKFLOW

This section covers these topics:

❖ Routing a Content Item (page 8-2)

About Starting a Workflow

There are two ways to start a workflow in Collaboration Manager:

❖ Check in a new or revised content item and route it to a Collaboration workflow. See Routing a Content Item (page 8-2).

❖ Check in a revision that meets the criteria for a Criteria workflow. The revision enters the workflow automatically.

Routing a Content Item

To route a content item for review:

1. After entering metadata and selecting members, click the **Selected Workflow "Configure"** button on the Content Check in Form (Project). The Configure Workflow Wizard (page 3-40) is displayed.
2. Select the type of workflow for the content item to enter.
3. Click **Next**. The Workflow Step Reviewer Page (page 3-41) is displayed.
4. Select one or more users and/or groups for each step in the workflow. Read the instructions for each step to make sure that you have selected the appropriate members.
5. Click **Next**. The Workflow Summary Page (page 3-42) is displayed.
6. Click **Finish**. Upon successful check-in, the Check In Confirmation page is displayed.

Appendix

A

SECURITY DETAILS

OVERVIEW

This chapter describes the **minimum** permissions required to perform various Collaboration Manager functions. This information is included to help administrators create special-case security configurations and to assist in troubleshooting.

Note: To allow for the most flexibility and the least system administrator involvement, you should give users broad system-level access to the Collaboration Manager, and then allow workgroup members to assign permissions at the project, folder, and document levels.

- This chapter contains the following topics:

As described in Altering Security with EnableForcedACLSecurity (page 3-10), the `EnableForcedACLSecurity` configuration variable can be used to alter the behavior of collaboration project security. By using the `EnableForcedACLSecurity` configuration variable, an administrator can set security to rely exclusively on the specific permissions which are set for aspects of a project such as folders, projects, and content.

The effect of this variable is discussed in the individual sections that describe security settings.

About Maximum Permissions

As a "best practice," administrators should provide users with maximum system-level access to the Collaboration Manager and then allow collaboration project leaders to assign permissions to the project, folder, and content items. Using this model, the following permissions would be assigned:

- To the subadministrator who creates projects: RWDA permission to the *Projects* security group and RWDA permission to the *prj* account.
- To the contributor who can create projects: RWD permission to the *Projects* security group and RWDA permission to the *prj* account.
- To the individual contributor who cannot create projects but who participates in projects: RWD permission to the *Projects* security group and RWD permission to the *prj* account.
- See the *Collaboration Manager System Administration Guide* for details about broad permissions.

About Minimum Permissions

In Collaboration Manager, many functions can be performed from more than one location in the user interface. In some cases, this results in different permissions being required to perform the same function, depending on how the item is accessed.

For example, if a user has permission to view a content item but does not have permission to view the project or folder where the content item is located, they cannot drill down to the content item on the Browse Content tray. However, they can access the content item from a number of locations in the user interface, including the search results page, workflow notifications, subscription notifications, and so forth.

The Collaboration Manager Security by Function (page A-2) section indicates where minimum permissions are different when a task is performed from different interface locations.

Collaboration Manager Security by Function

There are three main areas where security can be assigned:

- Project Security (page A-3)
- Folder Security for Projects (page A-5)
- Content Item Security (page A-8)

Project Security

A user's permission to perform project functions is determined by their security group, account permissions, **and** their permissions for the particular project.

- The system administrator assigns system-level security—roles and accounts—to all users.
- Project permissions are assigned by the project lead or by any user who has Admin permission for the project.

Project Minimum Permissions

This section describes the **minimum** permissions required to perform project functions.

- A user with the *admin* role does not need specific permission for the project to perform project functions. Generally, an *admin* user's permission for the *prj* account determines which functions they can perform.
- By default, the project lead has RWDA permission for the project. The project lead's project permissions cannot be changed.
- By default, the user who creates a project has RWDA permission for the project. This user cannot change their own permission for the project, but another user with Admin permission for the project can change their permissions for them.

This table shows only the effect of the Admin role on security permissions. The `EnableForcedACLSecurity` configuration variable does not affect Admin role permissions.

A useful way to interpret this table is in the form of a sentence:

> *In order to <**project function**>, on <**where function is performed**>, if I have <**do not have**> the Admin role, I must have **this** permission.*

For example:

> In order to **view a project** on the **My Projects page**, if I **have** the Admin role, I **do not need permissions** to the security group, *prj* account, project account or project.
>
> In order to **view a project** on the **My Projects page** if I **do not have** the Admin role, I must **Read** permission to the Projects security group, the prj account and the project.

Project Function	Where Function is Performed	Has *admin* Role	Permission to *Projects* Security Group	Permission to *prj* Account or Specific Project Account	Permission to Specific Project
View Project	My Projects page, Find Projects Results page, Trash	yes	None	None	None
		no	R	R	R
	Exploring “name” page	yes	None	R	None
		no	R	R	R
Check Content Into and Out of Project	Exploring “name” page	yes	None	RW	None
		no	RW	RW	RW
Update Project Metadata	Edit Collaboration Project page, Project Information page	yes	None	RW	None
		no	RW	RW	RWDA
Update Project Members	Members page, Edit Project	yes	None	RW	None
		no	RW	RW	RWDA
Delete Project	My Projects page, Find Projects results, Trash	yes	None	RWD	None
		no	RWD	RWD	RWDA
Add Project	Create New Project link	yes	None	None	N/A
		no	RW	RWDA	N/A
Restore Project	Trash	yes	None	RW	RW for original project
		no	RW	RW	RW for original project

A user does not need permission to the Projects security group to add a project, but R permission is required to view the content, and RW permission is required to contribute to the project. Generally, broader permission to the Projects security group (RW) is desirable for those who need to add projects.

Sending a project to the Trash is considered a move and requires fewer permissions than those needed to delete a project.

See Also

– *Project Creation Example (page A-12)*
– *Project Functions Example (page A-13)*

Folder Security for Projects

A user's permission to perform folder functions is determined by their security group and account permissions and their permissions for the particular folder.

- The system administrator assigns system-level security—roles and accounts—to all users.
- Folder permissions are assigned by the folder owner or by any user who has Admin permission for the folder.

Folder Minimum Permissions

This section describes the **minimum** permissions required to perform folder functions.

- A user with the default *admin* role (RWDA for the *Projects* security group) can perform all functions for any folder, regardless of their specific project and folder permissions.
- Being assigned the admin role does not automatically grant permissions to the *prj* account. That must be assigned separately.
- By default, the folder owner has RWDA permission for the folder. The folder owner's permissions cannot be changed.
- By default, the user who creates a folder has RWDA permission for the folder. This user cannot change their own permission for the folder, but another user with Admin permission for the folder can change their permissions for them.

If `EnableForcedACLSecurity=FALSE`, the following table describes the behavior in effect.

If `EnableForcedACLSecurity=TRUE` ***and*** the user **is** assigned the Admin *role*, the following table describes the behavior in effect.

If `EnableForcedACLSecurity=TRUE` and the user **is not** assigned the Admin *role*, the Admin permissions (the A in RWDA permissions to the security group) are no longer sufficient to grant various folder operation privileges. Only users with the Admin role can bypass folder and content item permissions. Therefore, specific permission will be needed for the project or the folder. Those entries marked with RWD**A** indicate where these specific permissions will be needed because the Admin role is not in use.

For example, when this is enabled even if a user has RWDA permission to the Projects security group, the folder and content item permissions now apply for that user. Therefore, they would need RW permission to a specific folder in order to update that folder's metadata.

A useful way to interpret this table is in the form of a sentence:

*In order to <**folder function**>, on <**where function is performed**>, I must have **this** permission.*

For example:

In order to **restore a folder** from the **Trash page**, I must have RW permission to the Projects security group, RW permission to the *prj* account, no necessary permission for the project, and RW permission for the original parent folder and RW for the folder being restored.

Folder Function	Where Function is Performed	Permission to *Projects* Security Group	Permission to *prj* Account or Specific Project Account	Permission to Project	Permission to Specific Folder
View Folder	Trash	R	R	None	R
		RWD**A**	R	None	None
	Exploring "name" page	R	R	R	R
		RWD**A**	R	R	None
Check Content In/ Out of Folder	Exploring "name" page	RW	RW	R (see **Security Note**, below)	RW
Update Folder Metadata	Hierarchy Folder Config page	RW	RW	R	RW
		RWD**A**	RW	R	None
Update Folder Members (see **Permission Note** below)	Hierarchy Folder Config page	RW	RW	R	RWDA
		RWD**A**	RW	R	None
Delete Folder	Exploring "name" page, Trash	RWD	RWD	R	RWD
		RWD**A**	RWD	R	None
Add Folder	Exploring "name" page	RW	RW	R	RW for parent folder/ project
		RWD**A**	RW	R	None
Restore Folder	Trash	RW	RW	None	RW for original parent folder and RW for folder being restored
Move Folder	Exploring "name" page	RW	RW	R	R for parent folder, RW for target folder, and RW for folder being moved
Create Folder Shortcut	Exploring "name" page	RW	RW	R	R for original folder, RW for target folder

Folder Function	Where Function is Performed	Permission to *Projects* Security Group	Permission to *prj* Account or Specific Project Account	Permission to Project	Permission to Specific Folder
Delete Folder Shortcut	Exploring “name” page	RW	R	R	R to folder containing the shortcut

Security note: If the `CollaborationUseLegacySecurity` configuration variable is set to TRUE, security will be as it was for version 7.0 in which a user must have RW permission on a project to contribute content to sub-folders that grant RW (as opposed to R).

Permission note: When `EnableForcedACLSEcurity=true`, permissions needed to the folder are not RWDA but RW.

See Also

– *Folder Creation Example (page A-13)*
– *Folder Functions Example (page A-14)*

Content Item Security

Note: Content item security also applies to discussion items. Posting to a discussion is the same function as checking in a content item.

A user’s permission to perform content item functions is determined by their security group, account permissions, **and** their permissions for the content item.

❖ The system administrator assigns system-level security—roles and accounts—to all users.

❖ Content item permissions are assigned by the Author or by any user who has Admin permission for the content item.

Content Item Minimum Permissions

This section describes the **minimum** permissions required to perform content item functions.

❖ A user with the admin role can perform all functions for any content item, regardless of their specific project, folder, and content item permissions. The only exception to this is that Read permission for the parent folder is required to view a content item on the Exploring “name” page.

❖ By default, the Author of a content item has RWDA permission for the item. The Author’s permissions cannot be changed.

- ❖ By default, the user who checks in a content item has RWDA permission for the item. This user cannot change their own permission for the content item, but another user with Admin permission for the content item can change their permissions for them.

If `EnableForcedACLSecurity=FALSE`, the following table describes the behavior in effect.

If `EnableForcedACLSecurity=TRUE` ***and*** the user **is** assigned the Admin *role*, the following table describes the behavior in effect.

If `EnableForcedACLSecurity=TRUE` and the user **is not** assigned the Admin *role*, then the project access list permissions for each content item augment the standard Content Server security model of security groups and accounts. Only users with the Admin role can bypass folder and content item permissions as established with the project access list. Therefore, specific permission will be needed for the project or the folder. Those entries marked with RWD**A** indicate where these specific permissions will be needed because the Admin role is not in use.

For example, when this is enabled even if a user has RWDA permission to the Projects security group, the folder and content item permissions now apply for that user. Therefore, they would need RW permission to a specific folder in order to update that folder's metadata.

A useful way to interpret this table is in the form of a sentence:

> *In order to <**content item function**>, on <**where function is performed**>, I must have **this** permission.*

For example:

> In order to **view an item** on the **Search Results page**, if I have **Read** permission to *Projects*, the *prj* account, and the Content Item, I do not need permissions to the parent folder or project.

Content Item Function	**Where Function is Performed**	**Permission to *Projects* Security Group**	**Permission to *prj* Account or Specific Project Account**	**Permission to Parent Folder or Project**	**Permission to Content Item**
View Content Item	Search results page, notification e-mails, Trash	R	R	None	R
		RWD**A**	R	None	None
	Exploring "name" page	R	R	R	R
		RWD**A**	R	R	None

Content Item Function	Where Function is Performed	Permission to *Projects* Security Group	Permission to *prj* Account or Specific Project Account	Permission to Parent Folder or Project	Permission to Content Item
Check Out Content Item	Exploring “name” page	RW	RW	R	RW
		RWDA	RW	R for project; none for subfolder	None
	Dashboard, Content Information page, Workflow Content page	RW	RW	R for project; none for subfolder	RW
		RWDA	RW	R	None
Check In New Content Item	Exploring “name” page	RW	RW	RW	RWDA automatically assigned to author
		RWDA	RW	R	RWDA automatically assigned to author
Check In Content Item revision	Exploring “name” page	RW	RW	RW	RW
		RWDA	RW	R	None
Update Content Item Members	Info Update Form	RW	RW	RW	RWDA
		RWDA	RWDA	None	None
Delete Content Item	Exploring “name” page	RWD	RWD	R	RWD
		RWDA	RWD	R	None
	Content Information page, Trash	RWD	RWD	None	RWD
		RWDA	RWD	None	None
Check in for other users	Exploring “name” page	RWDA	RWDA	R	None

Content Item Function	Where Function is Performed	Permission to *Projects* Security Group	Permission to *prj* Account or Specific Project Account	Permission to Parent Folder or Project	Permission to Content Item
Restore Content Item	Trash	RW	RW	RW for original parent folder	RW
Move Content Item	Exploring “name” page	RW	RW	R	RW for target folder, RW for content item
Create Content Item Shortcut	Exploring “name” page	RW	RW	R	R for content item, RW for target folder
		RWD**A**	RWDA	R	R for content item, None for target folder
Delete Content Item Shortcut	Exploring “name” page	RWD	RWD	R	RWD for content
		RWD**A**	R	None	None

If Trash is enabled, deleting a content item is considered a move and requires fewer permissions.

See Also

– *Content Checkin Example (page A-16)*

– *Content Functions Example (page A-17)*

Security Example

In this example, several internal users are set up as contributors and subadministrators with the following profiles in Collaboration Manager:

User Name	Roles	*Projects* Security Group Permission	*prj* Account Permission	Admin Rights
sysadmin	admin	RWDA	RWDA	All
hchang	subadmin	RWDA	RWDA	User Admin, Workflow Admin

User Name	Roles	*Projects* Security Group Permission	*prj* Account Permission	Admin Rights
pkelly	project_creator	RWD	RWDA	None
rgarcia	contributor	RWD	RWD	None
sjones	contributor	RWD	RWD	None
dmarkov	guest	R	R	None

The example is developed further in the following topics:

- Project Creation Example (page A-12)
- Project Functions Example (page A-13)
- Folder Creation Example (page A-13)
- Content Checkin Example (page A-16)
- Content Functions Example (page A-17)
- Discussions Example (page A-19)
- Workflow Example (page A-19)

Project Creation Example

With this scenario, three users can create projects: *sysadmin*, *hchang*, and *pkelly*. The other three users cannot create projects because they do not have Admin permission for the *prj* account.

In our example, *hchang* sets up a project (using **Browse Content—Manage Project—New Project**) named **2004 Annual Report**. This project will contain all of the content and communications related to the publication of the company's annual report. The following project permissions are specified:

- *pkelly* is the project lead (RWDA permission)
- *rgarcia* has RWD permission
- *sjones* has RW permission
- *dmarkov* has RW permission

See Also

– *Project Security (page A-3)*

– *Project Functions Example (page A-13)*

Project Functions Example

After assigning the appropriate permission, users can perform the following functions for the 2004 Annual Report project:

User Name	Project Functions	Explanation
sysadmin	All	The *sysadmin* user has the *admin* role and RWDA for the *prj* account, so they can perform all project functions.
hchang	All	The user who created the project has RWDA permission by default.
pkelly	All	The project lead has RWDA permission by default.
rgarcia	View, Check In Content	This user has RWD permission for the project, but you need Admin permission to be able to update or delete a project.
sjones	View, Check In Content	RW permission for the project allows this user to perform basic project tasks, but they cannot update or delete the project.
dmarkov	View	Although this user has RW permission for the project, they only have Read permission for the *Projects* security group and *prj* account.

See Also

– *Project Security (page A-3)*

– *Project Creation Example (page A-12)*

Folder Creation Example

Within the 2004 Annual Report project, *pkelly* creates two new folders (using the Action pull-down menu from the Exploring Project page), naming the folders **Design** and **Content**. The Design folder is for graphics and layout files, and the Content folder will contain text and spreadsheet documents. Note that the content types for graphics and content have been pre-defined.

The following folder permissions are specified:

User Name	Design Folder Permission	Content Folder Permission
pkelly	folder owner (RWDA)	folder creator (RWDA)
rgarcia	RW	folder owner (RWDA)
sjones	RWDA	RWD
dmarkov	none	RW

After these folders are created and work on the project begins, a large number of content items are checked in to the Content folder.

See Also

– *Folder Security for Projects (page A-5)*
– *Folder Functions Example (page A-14)*

Folder Functions Example

Users can perform the following functions for the **Design** folder:

User Name	Folder Functions	Explanation
sysadmin	All	The *sysadmin* user has the *admin* role, so they can perform all folder functions by default.
hchang	All	This user has RWDA rights to the *Projects* security group and the *prj* account.
pkelly	All	The folder owner has RWDA permission by default.

User Name	Folder Functions	Explanation
rgarcia	All except Delete Folder	RW permission for the **Design** folder (along with RWD to the *Projects* security group, *prj* account, and the project) allows this user to perform most folder tasks.
sjones	All	RWDA permission for the **Design** folder (along with RWD for the *Projects* Security Group and *prj* Account, and RW for the project) allows this user to perform all folder functions.
dmarkov	None	This user was excluded from the member list, so they cannot view the **Design** folder.

Users can perform the following functions for the **Content** folder:

User Name	Folder Functions	Explanation
sysadmin	All	The *sysadmin* user has the *admin* role, so they can perform all folder functions by default.
hchang	All	This user has RWDA rights to the *Projects* security group and the *prj* account.
pkelly	All	The user who created the folder has RWDA permission by default.
rgarcia	All	The folder owner has RWDA permission by default.
sjones	All except Update Members	RWD permission for the **Content** folder (along with RWD for the *Projects* Security Group and *prj* Account, and RW for the project) allows most tasks.

User Name	Folder Functions	Explanation
dmarkov	View	Although this user has RW permission for the **Content** folder, they only have Read permission for the *Projects* security group and *prj* account.

See Also

– *Folder Security for Projects (page A-5)*
– *Folder Creation Example (page A-13)*

Content Checkin Example

Now that a project and folders are set up, the users can begin checking content items in to the folders.

- All users except *dmarkov* can check content in at the project level.
- *pkelly*, *rgarcia*, and *sjones* can check content in to the Design folder and the Content folder. In addition, *hchang* and the sysadmin can because they have Admin permission.

The following content items are checked in to the 2004 Annual Report project:

Content Item	Folder	User Checking In File	Author	Access List
Project schedule	2004 Annual Report	pkelly	pkelly	pkelly(RWDA), hchang(R), rgarcia(RW), sjones(R), dmarkov(R)
Quark design file	Design	pkelly	pkelly	pkelly(RWDA), sjones (RWDA), rgarcia(R)
Zip of graphics	Design	sjones	sjones	pkelly(RW), sjones(RWDA), rgarcia(R)
Financials spreadsheet	Content	sjones	sjones	pkelly(RW), sjones(RWDA), rgarcia(RWD),dmarkov(RW)
Annual report text	Content	rgarcia	rgarcia	pkelly(RW), rgarcia(RWDA), dmarkov(RW)

See Also

– *Content Functions Example (page A-17)*

Content Functions Example

Users have the following access to the content items in the 2004 Annual Report project:

User Name	Content Item	Functions	Explanation
sysadmin	All	All	The *sysadmin* user can perform all content item functions by default.
hchang	Project schedule	All	This user has RWDA rights to the *Projects* security group and the *prj* account.
	Quark design file	All	This user has RWDA rights to the *Projects* security group and the *prj* account.
	Zip of graphics		
	Financials spreadsheet		
	Annual report text		
pkelly	Project schedule	All except Check In for Other Users	RWDA permission to the *Projects* security group is required to check in for other users.
	Quark design file		
	Zip of graphics	All except Update Members, Delete Content Item, and Check In for Other Users	RW permission for the content item.
	Financials spreadsheet		
	Annual report text		

User Name	Content Item	Functions	Explanation
rgarcia	Project schedule	All except Update Members, Delete Content Item, and Check In for Other Users	RW permission for the content item.
	Quark design file	View and Create Shortcut	R permission for the content item.
	Zip of graphics		
	Financials spreadsheet	All except Update Members and Check In for Other Users	RWD permission for the content item.
	Annual report text	All	RWDA permission for the content item.
sjones	Project schedule	View and Create Shortcut	R permission for the content item.
	Quark design file	All	RWDA permission for the content item.
	Zip of graphics		
	Financials spreadsheet		
	Annual report text	None	This user was excluded from the member list, so they cannot view the content item.
dmarkov	Project schedule	View	R permission for the content item.
	Quark design file	None	This user was excluded from the member lists, so they cannot view these content items.
	Zip of graphics		
	Financials spreadsheet	View Content	Although this user has RW permission for these content items, they only have Read permission for the *Projects* security group and *prj* account. To delete a content item shortcut, this user must have Read permission for the parent folders of both the shortcut and the original content item.
	Annual report text		

See Also

– *Content Checkin Example (page A-16)*

Discussions Example

As design of the annual report is taking shape, *sjones* wants to discuss some of the layout details. She submits a post to the discussion associated with the **Quark design file** content item. She then realizes that *rgarcia* has only Read permission because the discussion inherits permissions from the associated content item. Since *sjones* has Admin permission for the discussion, she can update the member list for the discussion to give *rgarcia* RW permission; the content item permissions remain unchanged.

Workflow Example

When the annual report is ready to be published, it needs to go through a final review. *pkelly* checks the annual report file into the **2004 Annual Report** project, assigns RW permission to *rgarcia* and *sjones*, and specifies that it needs to enter a three-step workflow.

- At the first step, *sjones* and *rgarcia* are editors. Their RW permission for the content item enables them to check out the content item and edit it before approval.
- At the second step, *pkelly* is the sole editor. Because he is the author, he has RWDA permission, and can edit the content item one last time. He also realizes that he has not given *dmarkov*, the final reviewer, access to the content item; before approval, he changes the member list to give *dmarkov* Read permission for the content item.

At the last step, *dmarkov* has final approval of the annual report. Read permission for the content item allows him to approve or reject the item. However, if this was an editor step, *dmarkov* would need RW permission to be able to check out the content item.

Appendix

B

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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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Glossary

G

GLOSSARY

access

The level of permission a member has to a project, folder, or content item. See also permissions (page G-5).

access list

A list of members who have permission to a project, folder, or content item.

administrator

See system administrator (page G-7).

Admin permission

The highest level of permission to a project, folder, or content item. See permissions (page G-5) for more information.

alert

A notice about a specific discussion post. See also Alerts (page 4-3).

alternate file

A web-viewable version of the primary file, or a version that can be converted to a web-viewable format upon checkin. The alternate file must be specified and checked in at the same time as the primary file. See also primary file (page G-5).

announcement

A content item that appears on the Announcement page for the associated project. See also Announcements (page 4-4).

associated discussion

A discussion that is related to a particular folder or content item. See also discussion (page G-3).

Author

A required metadata field that specifies the user who checked in a content item revision.

check in

To submit a file to the Collaboration Manager repository.

check out

To lock a content item in the Collaboration Manager repository so that no other users can revise it. Other users can still view and get a copy of a checked out content item. See also undo checkout (page G-7).

check out and open

A feature that enables users to check out and open content items directly in a WebDAV-compliant native application from Collaboration Manager. This feature requires WebDAV to be enabled.

Comments

An optional metadata field that is used for general notes about a content item.

conferencing

See on-line conferencing (page G-5).

content

A collective term for the content items in the Content Server repository.

Content ID

A required metadata field that provides a unique identifier for each content item.

content information

See metadata (page G-4).

content item

A file that has been checked in to the Content Server repository. A content item includes a primary file (page G-5) and metadata (page G-4), and can include an alternate file (page G-1).

contributor

A Content Server user who creates, revises, and collaborates on documents. Also, a user who submits a content item to a workflow.

criteria subscription

A subscription where the system administrator subscribes you to content items and discussions that meet certain criteria. You cannot unsubscribe from a criteria subscription.

Delete permission

The second-highest level of permission to a project, folder, or content item. See Specific Project Permissions (page 3-7) for more information.

Description

An optional metadata field that provides a description of a project or folder.

discussion

A set of threaded messages that enable project members to comment on projects, folders, content items, and general topics. See also Chapter 7 (*Working with Discussions)*.

discussion alert

See alert (page G-1).

editor

A user who can approve, reject, and check out a workflow item for editing. See also reviewer (page G-6).

Expiration Date

An optional metadata field that specifies the date and time when a content item is no longer available for viewing in Content Server.

external members

Users or groups who have access to your Content Server system but are not employees of your company or members of your organization.

folder

A level in the project hierarchy. Folders can contain subfolders, content items, and general discussions.

Folder Name

A required metadata field that specifies a unique name for a folder.

folder owner

See owner (page G-5).

Folders component

A Content Server “Extras” component that is required as a foundation for Collaboration Manager.

format

The file type for a primary or alternate file, such as a Word document (.doc), bitmap image (.bmp), Acrobat file (.pdf), and so on.

full-text search

A search that finds a content item based on the text that is contained in the file itself.

group

A group of users that can be referenced by a single name.

Indexer

Software included in Content Server that makes a list of all the words in any file in HTML, PDF, TXT, XML, or other supported format, and stores the list in a database. When you do a full-text search for content, the Content Server looks up your search terms in this index.

internal members

Users and groups who are employees of your company or members of your organization.

item

A content item, folder, or discussion.

member

A user or group who has been given access to a particular project, folder, or content item.

metadata

Information about a content item, folder, or project, such as Title, Description, Author, and so forth.

metadata propagation

A Folders component feature that enables contributors to copy default metadata values from parent folders to subfolders and content items.

metadata search

A search that finds an item based on metadata values. See also metadata (page G-4).

native file

The original file that is checked into the Collaboration Manager repository. See also Content Server.

on-line conferencing

Optional feature that enables users to link to an online meeting web site, such as WebEx or PlaceWare. See also On-line Conferencing (page 5-5).

owner

The user who has Admin permission to a folder by default. The owner is typically the user who created the folder.

parent folder

The next higher folder in the project hierarchy.

permissions

Various levels of access that a member can have to a project, folder, or content item. See also Read permission, Write permission, Delete permission, and Admin permission.

plain folders

An optional feature that shows project locations as plain folder icons instead of project icons in project-specific lists.

post

A message that is submitted to a discussion.

primary file

The native file that is checked in to the Content Server repository. See also native file (page G-4) and alternate file (page G-1).

project

The top-level unit of organization in Collaboration Manager.

project ID

An optional feature that displays the project ID in the page title on project-specific pages.

project lead

The user who has Admin permission and serves as the main contact for a project.

Project Name

A required metadata field that specifies a unique name for a project.

propagation

See metadata propagation (page G-4).

Read permission

The lowest level of permission to a project, folder, or content item. See permissions (page G-5) for more information.

Release Date

A required metadata field that specifies the date and time when a content item revision is available for viewing in Collaboration Manager.

rendition

A particular file associated with a content item, such as the native file (page G-4) or a web-viewable file (page G-8).

Repository Manager

An administration tool used to manage content items, subscriptions, and the Indexer.

reviewer

A user who can approve and reject a workflow item but cannot check it out for editing. See also editor (page G-3).

revision

A new or revised version of a content item. By default, revisions are numbered sequentially starting with Revision 1.

rights

The access a subadministrator has to work with administration tools in Collaboration Manager. See also subadministrator (page G-7), User Admin (page G-7), Repository Manager (page G-6), and Workflow Admin (page G-8).

route

To send a content item to other users for review using a workflow.

Select Member applet

A Java applet that is used to add members to projects, folders, and content items.

shortcut

A link to an original content item, general discussion, or folder.

status

The file status indicating where the file is in its life cycle. The following are valid statuses: EDIT, GENWWW, REVIEW, PENDING, DONE, EXPIRED, DELETED, and RELEASED.

subadministrator

A user who has rights to perform specific administrative tasks. See also rights (page G-6).

subscription

A Content Server function that notifies you by e-mail when a particular content item has been revised or a post has been submitted to a particular discussion. You can subscribe to individual content items and discussions, or you can subscribe to a folder or project to receive notification of changes to any items in that folder or project. See also criteria subscription.

system administrator

A user who has full administrative permissions and rights in the Collaboration Manager.

thread

A hierarchical group of posts within a discussion. See also discussion (page G-3).

Title

A required metadata field that specifies the title of a content item or discussion.

topic

The subject of a discussion post.

Type

A required metadata field that specifies which document category a content item belongs to.

undo checkout

Cancels a content item checkout without creating a new revision.

user

An individual who has been assigned a unique user name and a password for logging in to the Content Server.

User Admin

An administration tool used to manage users and groups.

user profile

Personal information about a user, such as full name, e-mail address, and so on.

vault

The Content Server directory where native files are stored.

WebDAV

WebDAV (Web-Based Distributed Authoring and Versioning) provides a way to remotely author and manage content using clients that support the WebDAV protocol. For example, you can use Microsoft Windows Explorer to check in, check out, and modify content in the Oracle repository rather than using Oracle's web browser interface.

web folder

A WebDAV feature that displays a Collaboration Manager project or folder in the Explorer view of the browser.

weblayout

The Content Server directory where web-viewable files are stored.

web-viewable file

A file in a format that can be viewed using a web browser, such as PDF or HTML.

workflow

A process that routes a file for review and approval before it is released to the Content Server repository. Users are notified by e-mail when they have a file to review.

Workflow Admin

An administration tool used to manage workflows.

Write permission

The second-lowest level of permission to a project, folder, or content item. See permissions (page G-5) for more information.

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