Content Server User Guide
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Chapter

1

ABOUT THIS GUIDE

ABOUT THIS GUIDE

This Content Server User Guide provides information for end-users of the Oracle content management system. It covers the following main topics:

- What's New (see chapter 2)
- Getting Started (see chapter 3)
- Becoming Familiar with the Interface (see chapter 4)
- Finding Files (see chapter 5)
- Working with Files (see chapter 6)
- Checking In Files (see chapter 7)
- Checking Out Files (see chapter 8)
- Working with Workflows (see chapter 9)

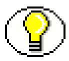
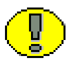
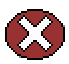
Conventions

The following conventions are used throughout this guide:

- 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.

Symbols

The following symbols are used throughout this guide:

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

ORACLE CONTENT MANAGEMENT

This section contains the following topics:

CONTENT SERVER

Content Server is an automated system for sharing, managing, and distributing business information using a website as a common access point. Current information can be accessed quickly and securely from any standard web browser. You can manage virtually any type of content—letters, reports, engineering drawings, spreadsheets, manuals, sales literature, and more—in one powerful content management system.

Note: This user guide describes the standard web pages and procedures that come with the "out-of-the-box" content server. However, Content Server can be highly customized, so your content server web pages might look quite different from those in this guide.

CONTENT REPOSITORY

When you check in a file, Content Server stores the original, or *native*, file in a central repository for native files. If your system includes any conversion products (page 1-5), a *web-viewable* version of the file (such as PDF) will be created and stored in a special repository for web-viewable files. (If you are not using a conversion product, or if a particular file type cannot be converted, a copy of the native file is placed in the repository for web-viewable files.)

A file that is checked into the content server is called a *content item*. Any user with the correct security permissions can view the web-viewable version of a content item or get a copy of the original file from the repository of native files. Security permissions determine who can view, revise, and delete a particular content item. For more information refer to Security (page 1-4).

The various types of files that can be associated with a single content item (the native file and any web-viewable files) are called *renditions*. For example, the PDF version of a content item is a rendition of that content item, as are the HTML and XML versions.

REVISION CONTROL

If you want to change a file that is checked into the content server, you need to check the content item out of the file repository. Only one person can have a content item checked out at any given time, but others can still view the released version of the file.

When you are finished making changes to the file, you check it back into the content server, which automatically stores the new file as a new *revision* of the content item.

Previous revisions remain available for you to view or copy, but the latest revision will always be displayed by default from content server web pages.

Every content item in the repository for web-viewable files has a *persistent URL*. This means that each content item has a unique web address that does not change from one revision to the next. Therefore, the most current version is always displayed when you point your browser to the URL of a content item. Refer to Working with File Revisions (page 6-11) for more information.

METADATA

Metadata is information about a content item, such as the title, author, release date, etc. Metadata can be used to find content items in the content server, much as you would search for books in a library by author or subject. When you check in a content item, you will need to assign some of the metadata, while some metadata is assigned by Content Server automatically. The metadata is stored in a database that works in conjunction with Content Server.

Content profiles created by your system administrator can refine the metadata options available to you during check in and searching, as well as what metadata is displayed on a content information page. This feature can improve how you work with Content Server. Check in and search forms defined by content profiles are accessed from the Search drop-down menu on the Toolbar.

Important: It is important that you understand your organization’s metadata fields and always assign metadata carefully. Proper metadata makes content items easier to find, and ensures that only users who have the proper permissions can access a content item.

Refer to chapter 5 (*Finding Files*) for more information.

SECURITY

Content Server’s security features are used to control which users can view, edit, and delete particular content items. With standard Oracle security, contributors must log in to the content server to be able to check in and check out files. Consumers who have access to secured files must also log in to the content server to be able to view the secured content.

When you check in a file, you may need to specify a value for the following security-related metadata fields:

- **Security group**
  Each content server user is given a particular level of permission to each security group. When you specify the security group for a content item, only the users who have permission to that security group can work with that content item. The security group is a required metadata field for all content items.
- **Account**
  Accounts are an optional feature that your system administrator can use to define a more flexible security model. Accounts are similar to security groups, in that only users who have permission to a particular account can work with content items that belong to that account.

USERS

Content Server is designed for two types of users:

- **Consumers**
  These are people who need to find, view, and print files from the content server repository. They do not have permission to create, modify, or delete files.
- **Contributors**
  These are people who need to create and revise files in the content server repository. They also have permission to find, view, and print files.

In many Content Server systems, the majority of users are consumers. To safeguard the integrity of files in the system, contributors need a user name and password to check content items in to and out of the content server repository.

Users who have full administrative permission are referred to as *system administrators*. Your organization may also assign limited administrative permission to certain users, such as the ability to set up user log ins and create workflow templates. These users are referred to as *subadministrators*.

CONVERSION PRODUCTS

Your content server system may include one or more conversion products, which convert native files to web-viewable file formats. Most conversions take place automatically as soon as you check in a file.

The web-viewable formats of a file depend on the original file format of the content item and the conversion products that are installed. For example, your system could be set up to convert Microsoft Word documents to the PDF format using the PDF Converter product, and to the HTML format using the Dynamic Converter product.

Some file formats cannot be converted, or your system administrator may configure the system to “pass through” certain types of documents without conversion. For example, a compressed zip file cannot be converted to a web-viewable format. In these cases, a copy of the native file is stored in the repository for web-viewable files.

INDEXING

Once a file has been converted to a web-viewable format or passed through to the repository for web-viewable files, the file is automatically “full-text indexed” by an indexing engine. The indexing engine makes a list of all the words in every file in HTML, PDF, TXT, XML, and other supported formats, and stores the list in a database. When you do a full-text search for content, Content Server looks up your search terms in this index. Once the indexing process is complete, the file is released to the content server.

FINDING CONTENT

Content Server provides two ways for users to find content:

- **Searching for content**
  You can search for a content item by its metadata, by full-text, or by a combination of the two. Only the content items you have permission to view will be displayed in the search results.
- **Browsing content**
  Browsing content using the **Browse Content** tray enables you to “drill down” to a content item by navigating through a set of hierarchical folders that are based on metadata. When you reach the last folder in a particular branch of the structure, content items that match the branch’s metadata and that you have permission to view will be displayed on a search results page.

Refer to chapter 5 (*Finding Files*) for more information.

WORKFLOWS

The workflow process 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.

Two types of workflows can be created in Content Server:

- In a **criteria** workflow, files automatically go into a workflow if the values entered in the metadata fields upon check-in meet certain criteria. Criteria workflows are useful for individual content items that are approved by the same reviewers on a regular basis (newsletter articles, for example).
- In a **basic** workflow, files are specifically identified in the workflow, along with the contributors, reviewers, and steps. This type of workflow requires an administrator to initiate the process, and is best suited for groups of content items that need to go through a workflow together or individual content items with unique workflow requirements.

Refer to chapter 9 (*Working with Workflows*) for more information.

Chapter

2

What's New

Overview

This section highlights the new features in version 10*g*R3 of the Content Server software. For new information specific to developers and integrators, refer to the *What's New* sections in the appropriate reference material.

The following enhancements and features are implemented in Content Server 10*g*R3:

❖ Query Builder Form (page 2-1)

❖ Search Results Templates (page 2-2)

❖ Targeted Quick Search (page 2-2)

❖ Internet-Style Search Syntax (page 2-2)

Query Builder Form

The Query Builder form is a new form available on the Advanced Search Page (page 5-34). It enables you to easily build and save complex queries by selecting options from a series of drop-down lists. Once a query is built using the Query Builder form, you may edit the query directly, perform the search, or save the query for easy access from My Saved Queries or through a targeted Quick Search.

Search Results Templates

Now you can personalize how search results are displayed by selecting an option from the Search Template (page 4-18) drop-down list on the User Profile Page (page 4-15), or from the Action Menus (page 5-43) from a search results page. There are three templates available by default, and you have the option to create new views based on the three provided templates. In this way, you can customize the metadata information you want to see on a search result. You can even specify different search results templates to be used for different saved queries. For more information, see Displaying Search Results (page 5-41) and Creating a Custom Search Result Template (page 4-13).

Targeted Quick Search

The quick search field now allows you to specify which metadata fields to search when text is entered into it, and any additional criteria to be run when a quick search is used. Targeted quick searches can be created by you or your system administrator, and you can choose whether or not to display them in the new targeted quick search action icon menu next to the quick search field. The Targeted Quick Search page lists all targeted quick searches, and is accessed by selecting *Edit* from the new menu.

Internet-Style Search Syntax

Searching is now easier with support for internet-style search syntax. This means that search techniques common to the most popular internet search engines and familiar to most people are now supported in Content Server. For example, typing *new product* in the Quick Search field will be interpreted as *new* <AND> *product*, while typing *new, product* is interpreted as *new* <OR> *product*. For more examples, see Internet-Style Search Syntax (page 5-17).

Oracle Full-Text Highlighting

If Content Server is running on top of an Oracle database and your system administrator has enabled the database full-text search capabilities, then search terms are highlighted in the returned text, and the forward (>>) and back (<<) navigation links bracket the highlighted text. Clicking the links will take you to the next and previous result in the text.

NEW SKIN

Oracle is always trying to improve how Content Server looks and feels. In addition to the new default skin, check your User Profile page for another skin, Oracle 2.

Chapter

3

GETTING STARTED

OVERVIEW

This section covers the following topics:

WORKING WITH YOUR WEB BROWSER

This section covers the following topics:

Supported Web Browsers

Consumers and contributors access Content Server from a standard web browser. The computer you use to access the content server is referred to as a *client computer*. Content Server can be accessed from any of the following web browsers on a client computer:

Browser	Versions	Platform
Microsoft Internet Explorer	5.5 SP2, 6.0 SP1, 7.0	Windows
Firefox	1.5	Windows, Macintosh, all UNIX platforms
Mozilla	1.7.12	Linux and Solaris
Safari	2.02	Macintosh
Netscape	No longer supported	None

Note: This documentation assumes you are using the default Trays layout.

Firefox Browser

There is a bug in the auto-complete functionality of Firefox that causes exception errors in the JavaScript Console under certain conditions (see https://bugzilla.mozilla.org/show_bug.cgi?id=236791). For example, you may see an error in the JavaScript console when pressing the Enter key to execute a search under the Trays (default) layout instead of clicking the Search button. This issue does not affect Content Server functionality or the effectiveness of the search, and may be ignored. The console errors may be avoided by turning off the Firefox auto-complete functionality. Mozilla is aware of the issue and working on a fix.

Mac Browsers

Since the Content Server interface is almost entirely web based, many standards-compliant web browser can access it for consumption. However, when using an Apple client there are a few issues when it comes to contribution and administration, due to limitations within the Apple client. This section contains some suggestions and workaround for these limitations.

Web browsers on the Mac have limited Java Applet support

For consumers, this is a consideration if you are using the Download Applet, or any applet that uses Java to JavaScript communication. For contributors, this is an issue if you want to use the Upload Applet, or the Select User Applet (present in the Collaboration Server and Records Management). The Administration page applets will work because they are not signed applets, and do not use Java to JavaScript communication.

Web browsers on the Mac may not support DHTML

Selecting a browser on the Mac is contingent on the operating system used and what functionality is preferred. The Content Server look and feel uses DHTML that works with fifth generation browsers. Earlier versions of the Mac browser that do not support DHTML may function in the "Classic Layout", but are not supported.

Older File formats on Mac have unique encoding

The file format used on older Mac files is not support by Windows or UNIX. This is an issue if the user wants to upload older files that have custom fonts, or a considerable amount of data in the "Resource Fork."

Configuring Your Web Browser

To ensure that Content Server works properly, configure your web browser according to one of the following procedures:

- ❖ Configuring Internet Explorer 5.x (page 3-3)
- ❖ Configuring Internet Explorer 6.0 (page 3-4)
- ❖ Setting Up Helper Applications and Plug-ins (page 3-5)

Configuring Internet Explorer 5.x

If you are using Microsoft Internet Explorer 5.*x* as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Tools—Internet Options**.
3. In the Cookies section on the Security tab, click the web content zone that your content server is in (usually “Internet” or “Local intranet”; contact your system administrator for the correct zone).

4. Click **Custom Level**.
5. Under **Cookies—Allow Cookies that are stored on your computer**, select the “Enable” option.
6. Click **OK**.
7. Click **OK** to save the settings.

Configuring Internet Explorer 6.0

If you are using Microsoft Internet Explorer 6.0 as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Tools—Internet Options**.
3. On the Privacy tab, make sure that the privacy setting slider is not set to the highest level (**Block All Cookies)**. Any of the other options is acceptable.
4. Click **OK** to save the settings.

Configuring Firefox 1.5 on a Windows Client

If you are using Mozilla Firefox 1.5 as your web browser on a Windows client, complete the following steps:

1. Start the web browser.
2. Choose **Tools—Options**.
3. Click **Privacy**.
4. In the Cookies section, enable **Allow sites to set Cookies** and click **OK**.

Configuring Firefox 1.5 on a Mac Client

If you are using Mozilla Firefox 1.5 as your web browser on a Macintosh client, complete the following steps:

1. Start the web browser.
2. Choose **Firefox—Preferences**.
3. Click **Privacy**.
4. In the Cookies section, enable **Allow sites to set Cookies** and close the preferences.

Configuring Firefox 1.5 on a UNIX Client

If you are using Mozilla Firefox 1.5 as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Edit—Preferences**.
3. Click **Privacy**.
4. In the Cookies section, enable **Allow sites to set Cookies** and close the preferences.

Configuring Safari 2.0.1 on a Macintosh

If you are using Apple Safari as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Safari—Preferences**.
3. Click **Security** and enable **Always**.
4. Close the preference window.

Setting Up Helper Applications and Plug-ins

To view content items on a client computer, you may need to install and configure helper applications or web browser plug-ins for specific file formats. For example, if content items are being converted to PDF files using PDF Converter, the Adobe Acrobat plug-in needs to be installed and configured for your web browser according to one of the following procedures:

- Configuring Adobe Acrobat 4.x (page 3-5)
- Configuring Adobe Acrobat 5.x (page 3-6)
- Configuring Adobe Acrobat 6.x and 7.x (page 3-6)

Configuring Adobe Acrobat 4.*x*

If you are using Adobe Acrobat 4.*x* or Adobe Acrobat Reader 4.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **File**—**Preferences**—**General**.
3. Clear the “Use Greek Text Below *x* Pixels” check box.

4. Click **OK**.

Configuring Adobe Acrobat 5.*x*

If you are using Adobe Acrobat 5.*x* or Adobe Acrobat Reader 5.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **Edit—Preferences**.
3. Select **Display**.
4. Clear the “Use Greek Text Below *x* Pixels” check box.
5. Click **OK**.

Configuring Adobe Acrobat 6.*x* and 7.*x*

If you are using Adobe Acrobat 6.*x* or Adobe Acrobat Reader 6.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **Edit—Preferences**.
3. Select **Page Display**.
4. Clear the “Use greek text below *x* Pixels” check box.
5. Click **OK**.

LOGGING IN TO CONTENT SERVER

This section covers the following topics:

❖ About Login (page 3-7)
❖ Login Screen (page 3-10)
❖ Register User Page (page 3-11)
❖ Logging in with a Content Server User Login (page 3-7)
❖ Logging in with a Windows User Login (page 3-8)
❖ Self-Registering (page 3-8)
❖ Logging Out with ExtranetLook Component (page 3-9)

About Login

Each time that you open a web browser window to gain access to Content Server*,* you need to log in from the *portal page*. Your system administrator should provide you with the URL of the content server portal page (for example, *http://your_server/contentserver*).

Your login method depends on the security model your organization has set up:

❖ Content Server standard security uses the **Login link** on the portal page.

❖ Microsoft Network security uses the **Microsoft Login** link on the portal page. The Microsoft Login link appears on portal page only if your organization is using Microsoft Network security to log in to Content Server. If your organization is using Microsoft Network security, then you are automatically authenticated into Content Server when you log in to the Microsoft network; you will not need to enter a user name and password.

❖ Self-registration enables you to create your own Content Server user name and password. If your organization is using self-registration, a **Self-Registration** link appears on the portal page. After you have self-registered, you will use the Login link to log in for future content server sessions. Rights and permissions for all self-registered users are defined by the system administrator at the time self-registration is enabled.

Logging in with a Content Server User Login

Use the following procedure to log in to Content Server using a standard content server user login:

1. Start your web browser.
2. Point your browser to the URL for your organization's content server portal page. An example of a URL is *http://server/contentserver*. The content server portal page is displayed.
3. Click the **Login** link on the portal page. The Login screen (page 3-10) is displayed.
4. Enter your content server user name and password. For security purposes, an asterisk appears for each character you type in the Password field.
5. Click **OK**. If you entered a correct user name and password, the content server home page (page 4-6) is displayed.

See Also

– *Logging in with a Windows User Login* (page *3-8*)

– *Self-Registering* (page *3-8*)

Logging in with a Windows User Login

Use the following procedure to log in to Content Server using your Windows user login:

Note: You can log in using your Windows user login only if the system administrator has enabled the Microsoft Network login function on your system.

1. Start your web browser.
2. Point your browser to the URL for your organization's content server portal page. An example of a URL is *http://server/contentserver*. The content server portal page is displayed.
3. Click the **Microsoft Login** link on the portal page. If you entered a correct user name and password, the content server home page (page 4-6) is displayed.

See Also

– *Logging in with a Content Server User Login* (page *3-7*)

– *Self-Registering* (page *3-8*)

Self-Registering

Use the following procedure to create your own Content Server user name and password:

Note: You can self-register only if the system administrator has enabled self-registration on your system.

1. Start your web browser.
2. Access the URL for your organization's content server portal page. An example of a URL is *http://server/contentserver*. The content server portal page is displayed.
3. Click the **Self-Registration** link on the portal page. The Register User page (page 3-11) is displayed.
4. Enter a user name and password, and re-enter the password in the Confirm Password field.

5. Specify additional user information, such as your full name, e-mail address, and user locale.
6. Click **Register User**. A success message and Login link are displayed.
7. To log in to the content server, click the **Login** link. The Login screen (page 3-10) is displayed.
8. Enter your content server user name and password. For security purposes, an asterisk appears for each character you type in the Password field.
9. Click **OK**. If you entered a correct user name and password, the content server home page (page 4-6) is displayed.

Note: To log in to the content server in the future, use the **Login** link in the portal navigation bar. See Logging in with a Content Server User Login (page 3-7).

See Also

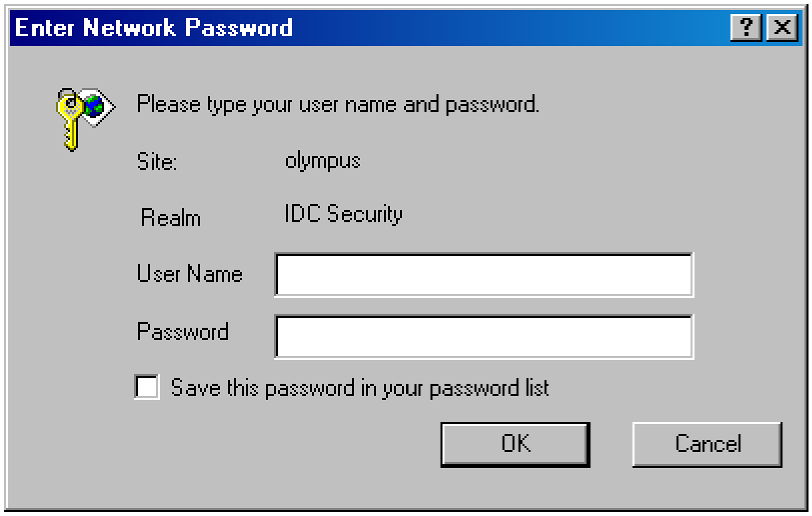
– *Logging in with a Content Server User Login* (page *3-7*)

– *Logging in with a Windows User Login* (page *3-8*)

Logging Out with ExtranetLook Component

Normally, basic user authentication does not allow customization or logout functionality. Closing all open browser windows logs out of Content Server. The optional ExtranetLook component adds the ability to customize the look and feel of Content Server for anonymous users, and adds logout functionality to Content Server. It is available to your system administrator as a bundled option, and is not installed by default. If the optional ExtranetLook component is installed, then a Logout link is added to the toolbar at the top of a Content Server instance.

Login Screen



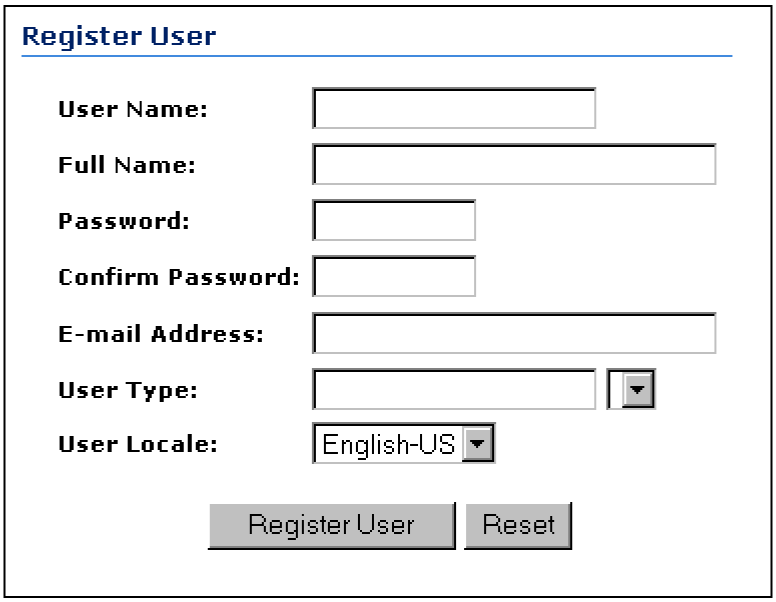
The Login screen is used to enter your content server user name and password. This screen is accessed by clicking the **Login** link on the Content Server portal page.

Note: Once you are logged in, you will not be asked to log in again as long as the browser window stays open. Even if you go to other websites, you will be logged in automatically if you come back to the content server. The exceptions to this are if your system administrator has configured a Content Server workflow to track digital signatures on one or more steps, or if they have enabled the optional ExtranetLook component bundled with Content Server , and you have used the logout feature. See Workflow Process (page 9-3) and Logging Out with ExtranetLook Component (page 3-9) for more information.

Feature	Description
User Name field	Enter your content server login user name.
Password field	Enter your content server login password.
“Save this password in your password list” check box	**Selected**—The current user name and password will be filled in automatically the next time you log in to the content server from this client computer. **Clear**—The user name and password fields will be blank the next time you log in to the content server from this client computer. This check box appears only in Internet Explorer.

Feature	Description
OK button	Logs in to the content server with the specified user name.
Cancel button	Cancels the login.

Register User Page



Your system administrator may have configured Content Server to allow self-registration. If so, the **Self-Registration** link is displayed on the Content Server portal page, and on the Home page toolbar if you initially access Content Server as Guest. Access to content for self-registered users is determined by default rights and permissions established by your system administer. Check with your system administrator if you are uncertain whether or not you should self-register. Once you have self-registered, you do not need to do so again.

The Register User page is used to define your user information during self-registration. This screen is accessed from the **Self-Registration** link on the Content Server portal page, and from the toolbar on the Home page if a person initially accesses Content Server as Guest.

Important: Remember the user name and password you create during self-registration. The next time you log in to Content Server, click the **Login** link on the Oracle portal page and enter the user name and password you created during self-registration.

Feature	Description
User Name field	Enter a user name. This is the user name you will use to log in to the content server.
Full Name field	Enter your full name. This name will appear in various locations in the content server user interface.
Password field	Enter your content server password. Asterisks are displayed for security reasons.
Confirm Password field	Re-enter your password in this field to confirm that you entered it correctly. Asterisks are displayed for security reasons.
E-mail Address field	Enter your e-mail address. This address will be used for workflow and subscription notifications.
User Type field	This is an identifier that can be used by the system administrator to place users in groups. **This field should not be changed.**
User Locale field	This sets the language and date/time format displayed on content server pages. If the system administrator has enabled more than one locale option, you can select the locale that you prefer.
Custom user information fields	If your system administrator has created custom user information fields, you might be able to specify additional information that will be stored with your user login.
Register User button	This creates your user login.
Reset button	This resets all fields to their default values.

Chapter

4

BECOMING FAMILIAR WITH THE INTERFACE

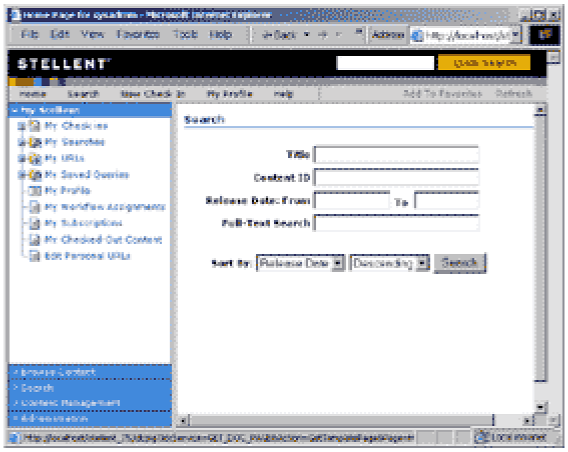
OVERVIEW

A profound benefit of managing content is the ability to quickly find the information you need and complete the tasks your job requires. Content Server provides a simple interface using standard web applications and common navigational tools to provide access to the tasks necessary to contribute and find content.

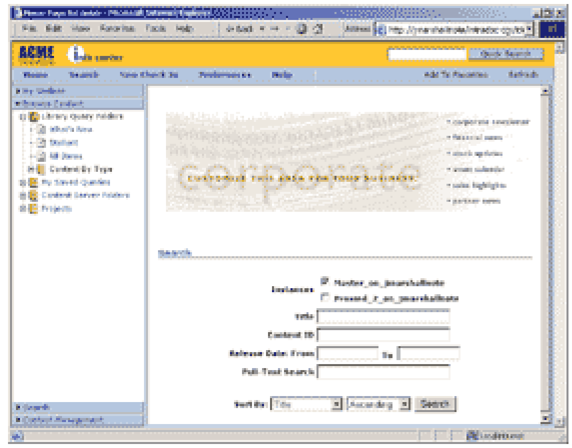
This chapter provides an overview of the standard Content Server web pages, and describes how to use and customize the navigation features of the interface.

This section covers the following topics:

Customizable Interface



Standard content server home page

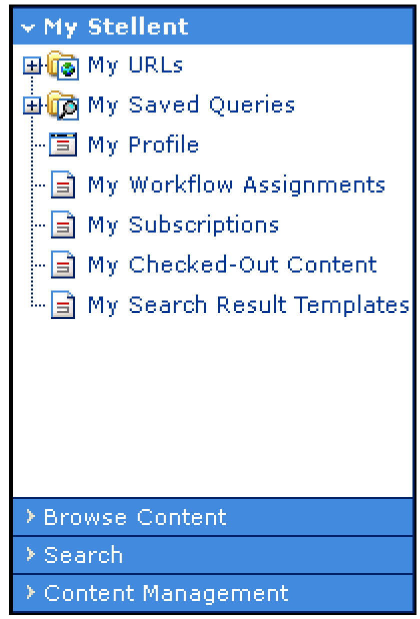


Customized content server home page

The Content Server interface can be highly customized, so your content server web pages might look different than those described throughout this guide. For example, you may see special colors, icons, and logos, or your system administrator may choose to add, change, or hide functions on certain pages. Contact your system administrator for user documentation specific to your content server system.

Portal Navigation Bar

Portal navigation page before login



Tray navigation after login

The *portal navigation bar* is displayed on the left side of all Content Server web pages. This is your primary navigation tool, and it can be personalized with functions you use often, such as predefined searches and links to your favorite websites.

Note: The portal navigation bar is part of the frame-based *Trays* layout option, and is the default navigation tool for Content Server. If the non-frame layout option *Top Menus* is selected in the user profile, then the portal navigation functionality is moved above the main content area as a series of drop-down menus.

Link	Description
Links in the portal navigation bar before login	
Login	Displays the Login screen (page 3-10), where you enter your user name and password to log in to the content server. If you are already logged in, the Login link will not appear in the portal navigation bar.

Link	Description
Self-Registration	Displays the Register User page (page 3-11) Self-registration enables you to create your own Content Server user name and password. This link is only available if your organization is using self-registration.
Home	Displays the Home page (page 4-6).
Library	Displays the content server's hierarchical link structure (page 5-3). You can "drill down," or browse through, folders in this hierarchy to find specific files.
Search	Displays the Search tray (page 5-30). From this page, you can perform metadata and full-text searches to find specific files.
Microsoft Login	If you are already logged in to your Microsoft network, clicking this link logs you in to the content server. This link is displayed only if your organization is using Microsoft Network security to log in to Content Server.
Links in the portal navigation bar after login	
My Content Server	Expands to display links to personal check in pages, personal search pages, personal URLs, saved queries, user profile, workflow assignments, subscriptions, checked-out content, and list templates.
Browse Content	Expands to display a hierarchical link structure for finding content and any other special folders configured by the system administrator.
Search	Expands to provide several options for finding content and includes a tab for viewing persistent search results.
Content Management	Expands to display several links for managing content, such as new check-in, checked-out content (by all users or the current user), work in progress, active workflows, and expired content. This link is displayed only if you have contributor permission.

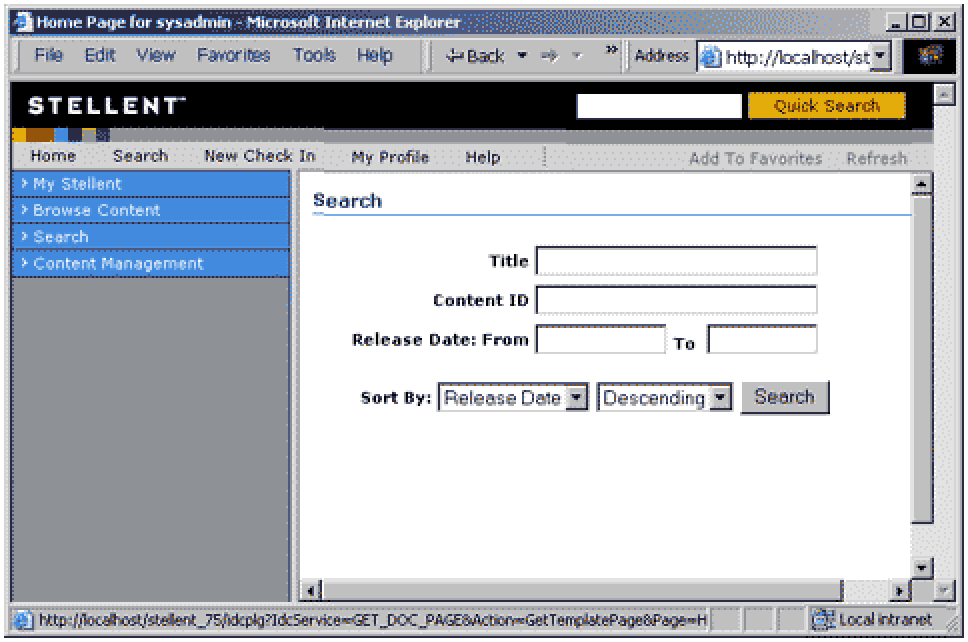
Toolbar

The toolbar is displayed at the top of all Content Server web pages. It contains some of the same navigation links as the portal navigation bar (page 4-3), and also provides access to the online help system.

Note: If any Content Profiles (page 7-22) have been created and enabled for display on your instance by your system administrator, the Search and New Check In links are changed to drop-down lists, listing the profiles.

Link	Description
Home	Displays the Home page (page 4-6).
Search	Displays the Advanced Search Page (page 5-34) or optionally pulls down to display links to content profile search pages set up by the system administrator. From the Advanced search or content profile search page, you can perform metadata and full-text searches to find specific files.
New Check In	Displays the content check-in form (page 7-7), which is used to check new files into the content server.
My Profile	Displays your user profile (page 4-15).
Logout	**Optional**—Logs out of Content Server. Available only if the optional ExtranetLook component is installed.
Help	Displays the online help system.

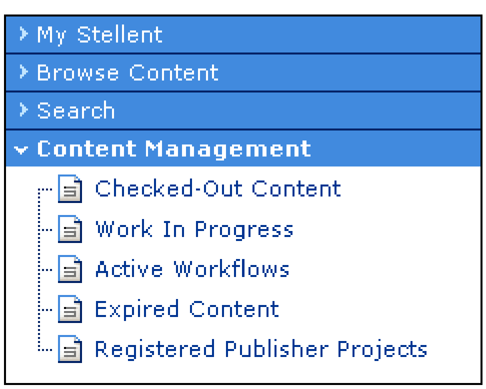
Home Page



The home page typically includes the tray navigation, the top toolbar, and other page content and functions as determined by your system administrator. If you set up a default saved query, the results are displayed on this page (you may have to scroll down to view them).

The home page is displayed when you first log in, and you can return to the home page anytime by clicking the Home link in the toolbar (page 4-5).

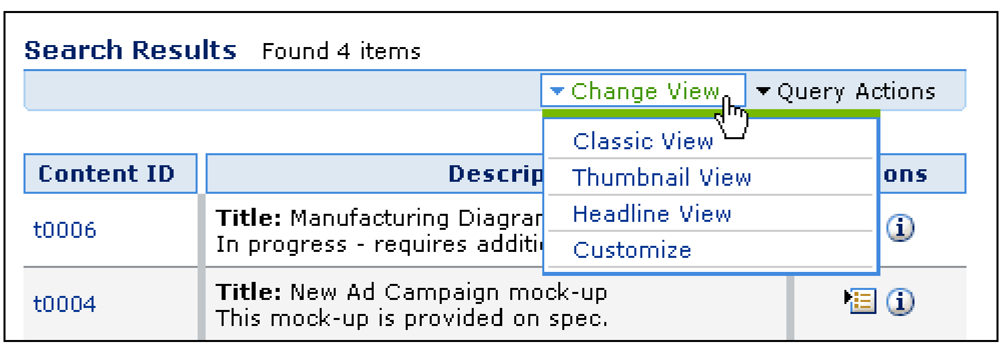
Content Management Tray



The Content Management tray enables contributors to manage content in Content Server. To open this tray, click **Content Management** in the portal navigation bar (page 4-3).

Link	Description
Checked Out Content	Displays the Checked Out Content page (page 8-8), which is used to view a list of all files currently checked out of the content server.
Work In Progress	Displays the Work In Progress page (page 6-5), which lists files that have been checked in, but not released.
Active Workflows	Displays the Active Workflows page (page 9-13), which is used to view the workflows that are currently active.
Expired Content	Displays the Expired Content page, which lists files that have expired and will be expiring soon.
Registered Publisher Projects	Displays the Registered Publisher Projects page, which is used to register Content Publisher projects. (The Content Publisher product is required to use this feature.)

Action Menus

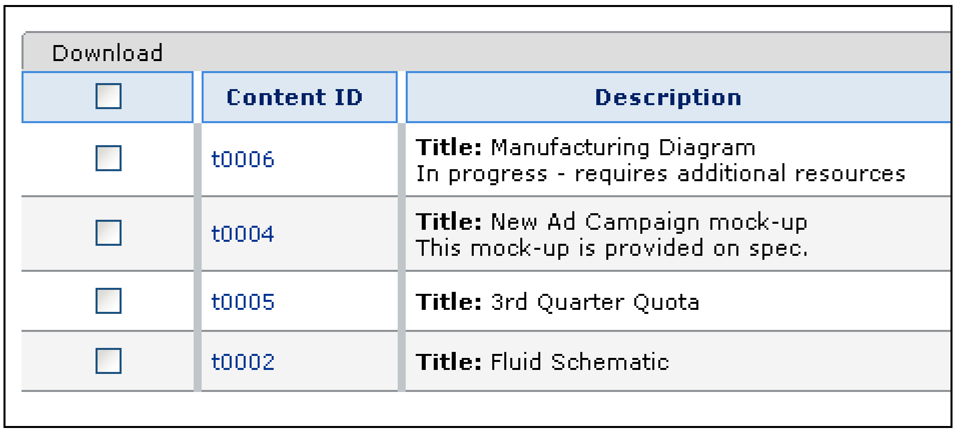


Action menus are drop-down menus with options that change depending on the context. There are three types of action menus:

- Page Action Menus—These action menus pull down from below the page heading, and list options that apply to the entire page. There may be multiple action menus for a page. For example, on a search results page the *Change View* menu lists options for changing the view of the search results, and the *Query Actions* menu lists options for searching within or saving the existing search.

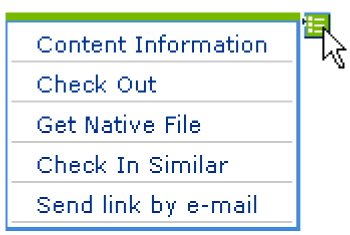
❖ Table Action Menus—These action menus are displayed above a table of content items, and list options that can be applied to multiple items selected in the table. For example, if the upload or download applets are enabled, you can select multiple items from a search result list and use the table action menu to download them.

Figure 4-1 Table Action Menu when download applet enabled



❖ Item Action Menus—These action menus pull down from the item action menu icon ( ) next to a content item, and list actions that pertain only to the associated content item. For example, among the options in the item action menu for an item in a search result are links to check out the item or view the item's content information.

Figure 4-2 Item Action Menu from a search result



Pop-Up Calendars

The Pop-up calendar component adds functionality to Content Server, and is available to your system administrator as a bundled option. It is not installed by default. If your system administrator has installed the Pop-up calendar component, a calendar icon is displayed to the right of all editable date metadata fields:

- Release Date (Content Check In page and Search page)
- Expiration Date (Content Check In page and Search page)

Clicking the calendar icon displays the Pop-Up Calendar Screen (page 4-9).

This enables you to quickly select dates and easily move between previous and future months and years. It also eliminates date formatting errors and typos because date fields are automatically populated with the user-selected date.

Note: By default, the icon is displayed only with the Expiration Date on the Info Update page. However, this can be changed by your system administrator.

Pop-Up Calendar Screen

Clicking the Pop-Up Calendar Icon (page 4-8) opens an interactive calendar screen that displays the current date (month, day, year) by default.

Feature	Description
Double left-facing arrows	Enables you to navigate to previous years without using the year pull-down menu. Each click regresses one year. The calendar adjusts to display the appropriate days for the selected month in the earlier year.
Single left-facing arrow	Enables you to navigate to previous months without using the month pull-down menu. Each click regresses one month. The calendar adjusts to display the appropriate days for the earlier month.

Feature	Description
Month pull-down menu	Displays the short month names from January through December. By default, the current month is removed from the list.
Year pull-down menu	Displays a 21-year sequential range of years. By default, the current year is displayed. You can select from a list of 10 years earlier and 10 years later than the displayed year by scrolling up and down. For example, if 2005 is displayed, the years 1995 through 2004 precede it and it is followed by the years 2006 through 2015. You can increment or decrement the 20-year range by selecting a different year. The Pop-up Calendar component automatically refreshes the year pull-down menu. In addition to the selected year, it lists the ten years prior and the nine years following the selected year. The date ranges are indefinite for both historical years and future years. **Note:** When you close the pop-up calendar, it automatically defaults back to the current day, month, and year.
Single right-facing arrow	Enables you to navigate to future months without using the month pull-down menu. Each click progresses one month. The calendar adjusts to display the appropriate days for the future month.
Double right-facing arrows	Enables you to navigate to future years without using the year pull-down menu. Each click progresses one year. The calendar adjusts to display the appropriate days for the selected month in the future year.
Monthly calendar days	Displays the days appropriate for the selected month and year.

Setting Release and Expiration Dates

You can use the Pop-up Calendar to populate the Release Date and Expiration Date metadata fields on the Content Check In and Search pages. By default, only the Expiration Date can be updated on the Info Update page.

To select a date using the Pop-up Calendar:

1. Access the Content Check In page or the Search page. By default, the current date is already displayed in the Release Date metadata field.
2. Click the Pop-up Calendar icon next to the Release Date or Expiration Date metadata field. The Pop-Up Calendar Screen (page 4-9) is displayed.
3. Select the desired month, day, and year. The selected date is entered into the metadata field.
4. Close the Pop-up Calendar screen.

Updating Expiration Dates

To update the Expiration Date metadata field on the Info Update page:

1. Select a content item and access the Info Update page.
2. Click the Pop-up Calendar icon next to the Expiration Date metadata field. The Pop-Up Calendar Screen (page 4-9) is displayed.
3. Select the desired month, day, and year. The selected date is entered into the metadata field.
4. Close the Pop-up Calendar screen.

PERSONALIZING THE INTERFACE

This section covers the following topics:

About Personalization

When you log in to Content Server, the system retrieves information about you that is stored in your *user profile*. While much of the information in your user profile (such as your user name and security permissions) can be changed only by the system administrator, there are several items you can change yourself:

❖ You can change personal information, such as your full name, password, and e-mail address on the User Profile page (page 4-15).

❖ You can add links to the My Content Server tray (page 4-20). This provides quick access to functions you use often, such as predefined searches and links to your favorite websites.

❖ You can personalize the way you search for and display content by specifying the default search form used on the Advanced Search page, creating targeted quick searches accessed from the Quick Search Field (page 5-19), and creating new search results templates for displaying different types of content in different ways.

Editing Your User Profile

Use the following procedure to edit your user profile information:

1. Click **My Profile** in the toolbar (page 4-5), or under the **My Content Server** tray in the portal navigation bar (page 4-3).

   The user profile (page 4-15) is displayed.

2. Edit your full name, password, and e-mail address as necessary. Please note the following considerations:

   - If you are changing your password, you must enter the new password in both the **Password** and **Confirm Password** fields.
   - Do not change your user type or user locale; these fields should be changed only by a system administrator.

3. Select an option for e-mail notification format, either HTML or text.

4. Enable or disable the upload and download applets.

Note: The check boxes for the upload and download applets will be displayed only if the system administrator enabled them.

5. Select a layout, skin, search template, and search form type.

6. Click **Update**.

Creating a Custom Search Result Template

Use the following procedure to create a custom search result template:

1. Navigate to the *Search Result Templates for 'user'* page.
   - From a search result page, select **Customize** from the Actions choice list.
   - Open the *My Content Server* tray and click **My Search Result Templates**. The *Search Result Templates for 'user'* page is displayed.
2. Click the Add Template icon ( ) in the Actions column next to the provided List template on which you want to base your custom template. The *Create Custom Template* page is displayed.
3. If your custom template is not based on the provided Headline View template, skip to the next step. If your custom template is based on the Headline View template, select a metadata field that you want displayed as a column from the **Available Fields** scroll list, and click the right arrow ( ). The selected metadata field is added to the *Columns* field. Each desired field must be selected and moved separately. You can reorder the column display by using the up and down arrows next to the *Columns* field.
4. Select a metadata field that you want displayed in the **Description** column from the **Available Fields** scroll list, and click **Move Here** beneath the **Description** field. The metadata field is added to the Descriptions field. Each desired field must be selected and moved separately.

Important: You must select the Description metadata field for display as a column in order for any metadata field selected for display in the Description field to be visible.

Note: You may change the order in which the columns or metadata fields are displayed by selecting the metadata field name in either the **Columns** or **Description** field and clicking **Move Up** or **Move Down**. The higher on list, the farther to the left the column is, or the higher in the description column the field is displayed.

5. Click **Save**.

Adding Links to Favorites

You can add a link to the Favorites menu of your browser so that you can quickly access any content or content server page. Use the following procedure to add a link to your Favorites menu:

1. Browse to the page you want to add to your Favorites. The page could be a search result, a content information page, a content item, or any other page accessed by the content server.
2. Click the **Add to Favorites** link in the upper right of the toolbar (page 4-5).

   The Add Favorite dialog box is displayed.
3. Select the folder in which you want the Favorite and click **OK**.

Editing Saved Queries

Use the following procedure to edit links to saved queries in your My Saved Queries tray:

Note: See Saving a Query (page 5-58) for information on how to save a query link in your portal navigation bar.

1. Click the **My Saved Queries** link under the **My Content Server** tray.

   The Saved Queries page (page 4-47) is displayed.
2. To delete a saved query, select the **Delete** check box.
3. To display the results of a query on the home page, select the **Default** option for that query and select the **Show Default Query** check box.
4. To set the number of content items displayed on the home page for the selected default query, enter a number in the **Results on portal page** field, and make sure that the **Show Default Query** check box is selected.
5. Click **Update**.

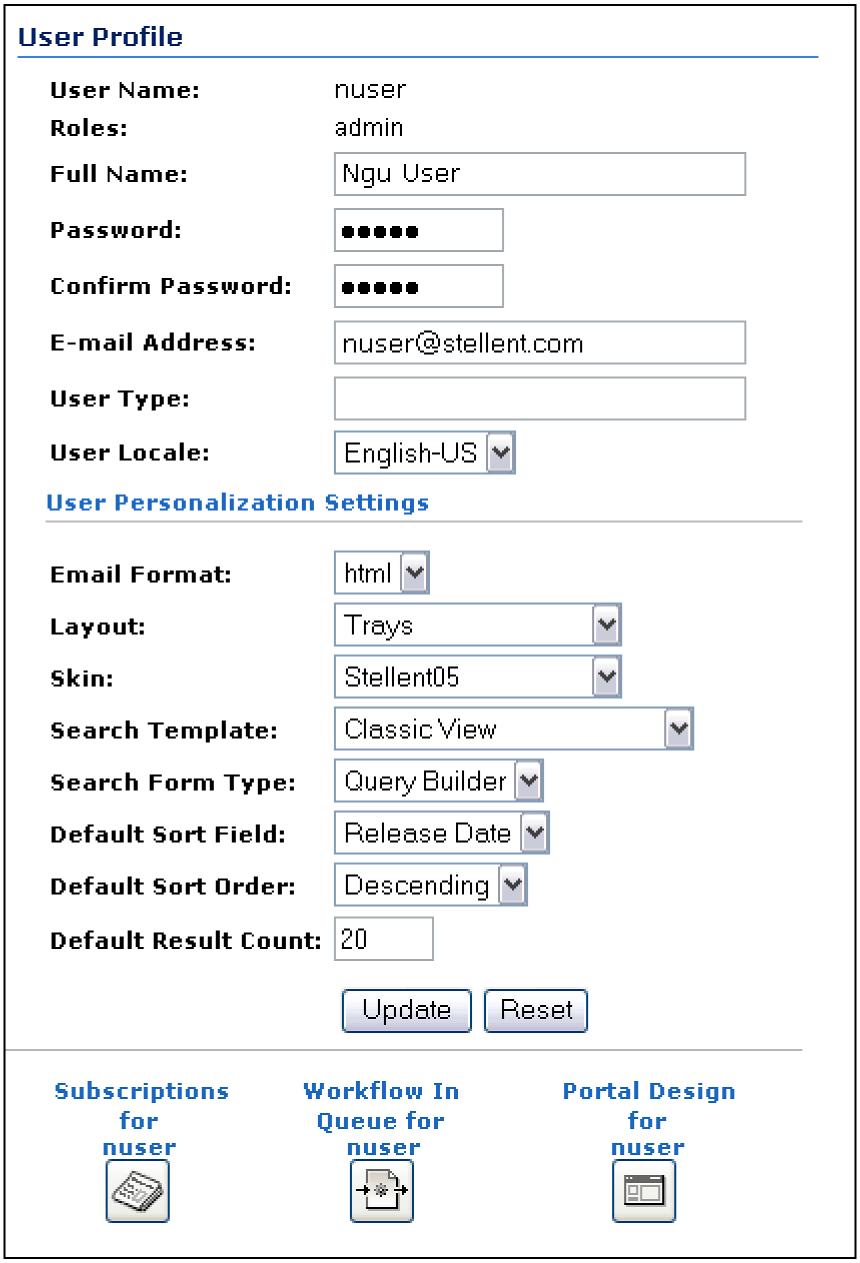
Saving Personal URLs

Use the following procedure to save links to websites in your portal navigation bar:

1. Click the **My Urls** link under the **My Content Server** tray in the portal navigation bar.

   The Personal URLs page (page 4-49) is displayed.
2. Type a descriptive name in the **Title** field. This name will appear as the link in your portal navigation bar.
3. Enter a complete web address in the **URL** field, for example: *http://www.oracle.com.*
4. Click **Update**.

User Profile Page



Your user profile enables you to change information about yourself and provides access to other user functions. To access the user profile page, click the **My Profile** link under the My Content Server tray in the portal navigation bar (page 4-3), or on the toolbar.

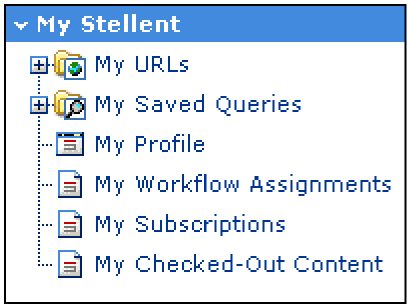
Feature	Description
User Name field	The user currently logged in. This field cannot be modified.
Roles field	The roles assigned to your user login. Roles determine what access you have to content and system functions. This field cannot be modified.
Accounts field	**Optional**—If your system administrator has enabled accounts, this field lists the accounts you have access to.
Full Name field	The full name is used by the system administrator to identify users easily.
Password field	Your login password. Five asterisks are displayed in this field regardless of how many characters are in your password.
Confirm Password field	If you change your password, you must re-enter it in this field. Five asterisks are displayed in this field regardless of how many characters are in your password.
E-mail Address field	The e-mail address that is used for subscription notifications and workflow notifications.
User Type field	An identifier that can be used by the system administrator to place users in groups. **This field should not be changed.**
User Locale field	Sets the language and date/time format displayed on content server pages. If the system administrator has enabled more than one locale option, you can select the locale that you prefer.
User Personalization Settings	
Email Format field	**html**—You will receive subscription and workflow notification e-mails in HTML format. **text**—You will receive subscription and workflow notification e-mails in plain-text format.

Feature	Description
Note: The following check boxes will be displayed and editable only if the system administrator has enabled them in the system settings. **Important:** See Working with Your Web Browser (page 3-1) for a list of supported browsers and information on browser limitations related to running applets.	
“Enable download applet” check box	**Selected**—The download applet is enabled, so you can check out multiple files. For more information, see Checking Out Multiple Files (page 8-3). **Clear**—The download applet is disabled.
“Enable upload applet” check box	**Selected—**The upload applet is enabled, so you can check in multiple files. For more information, see Checking In Multiple Files (page 7-11). **Clear**—The upload applet is disabled.
Note: If the download applet is enabled, it is used even when downloading a single file. For example, clicking the “Native File” file link on a content information page initiates the applet. If you are using a Windows operating system and right-click on the “Native File” link then select “Save Target as” from the contextual menu, and error message is displayed.	
Layout	Sets the user interface of Content Server. **Trays**—This is the default layout when Content Server is installed. Features include expanding trays in the portal navigation bar (page 4-3), including a Search tray and Result tab. This is a frame-based layout. **Top Menus**—Trays are removed from the portal navigation bar (page 4-3) and replaced by drop-down menus located above the content area. This layout does not use frames. **Classic**—Trays are removed from the portal navigation bar (page 4-3). Functions are accessed using a combination of links in the portal navigation bar (page 4-3) and the toolbar (page 4-5). No skin options are available for this layout. This layout does not use frames.

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td colspan="2">Note: The Trays layout is a frame-based layout. If your browser does not support frames, then the layout will default to Classic. If you want the full URL of a Content Server page displayed in your browser’s address bar, then you should select one of the non-frame layouts.</td></tr>
<tr><td>Skin</td><td>Skins provide predefined color and icon choices for each layout.
Oracle—(Default) Predominantly blue and white
Oracle 2—Predominantly blue and grey</td></tr>
<tr><td>Search Template</td><td>Sets the information included in a search result, and the format in which it is display.
Headline—A single line list of search results with no thumbnail image.
Thumbnail—A thumbnail image or content type icon is displayed.
Classic—A thumbnail image or content type icon and descriptive text is displayed.
Custom Search Templates—Allows you to select a customized search result view. Customized search templates may be created and saved by you or your system administrator, and define what metadata is listed in a search result and how it is displayed. Custom search templates can be set as a default view, selected from a search results page, or associated with a particular targeted search query.</td></tr>
<tr><td colspan="2">Note: The search result view can be changed dynamically using the Actions drop-down list on a search results page. Once selected on a search results page, the view is saved as the default view for subsequent search results.</td></tr>
</table>

Feature	Description
Search Form Type	Sets the default search form on the Advanced Search page. **Expanded Form** (page 5-35)—Displays all search field options on a single page. **Query Builder Form** (page 5-38)—Offers available search fields for selection from drop-down lists, and enables field for direct edit of the query text.
Default Sort Field	Sets the default field by which to sort search results.
Default Sort Order	Sets the default order in which search results are displayed.
Default Result Count	Sets the maximum number of content items listed on a search results field.
Buttons	
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.
Links	
Subscriptions for *[User]* link	Displays the Subscriptions page (page 6-31).
Workflow in Queue for *[User]* link	Displays the Workflow in Queue page (page 9-14).
Portal Design for *[User]* link	Displays the Portal Design page (page 4-45).

My Content Server Tray



The My Content Server tray places links to various system functions specific to you in your portal navigation bar.

To access the links in this tray, expand the tray by clicking **My Content Server** on the portal navigation bar (page 4-3).

Feature	**Description**
My URLs icon	Expands the folder to display links to any URLs you have saved using the Personal URLs page (page 4-49). Saved URLs can include web addresses to internal content or external sites.
My URLs link	Displays the Personal URLs page (page 4-49).
My Saved Queries icon	Expands the folder to display links to any searches you have saved using the Save Search action on a search results page.
My Saved Queries link	Displays the Saved Queries page (page 4-47), where you can remove searches from your My Saved Queries folder.
My Profile	Displays the user profile (page 4-15).
My Workflow Assignments	Displays a list of all content items currently in a workflow for which you have responsibility.
My Subscriptions	Displays a list of all content items to which you are subscribed.
My Checked-Out Content	Displays a list of all content currently checked out by you.

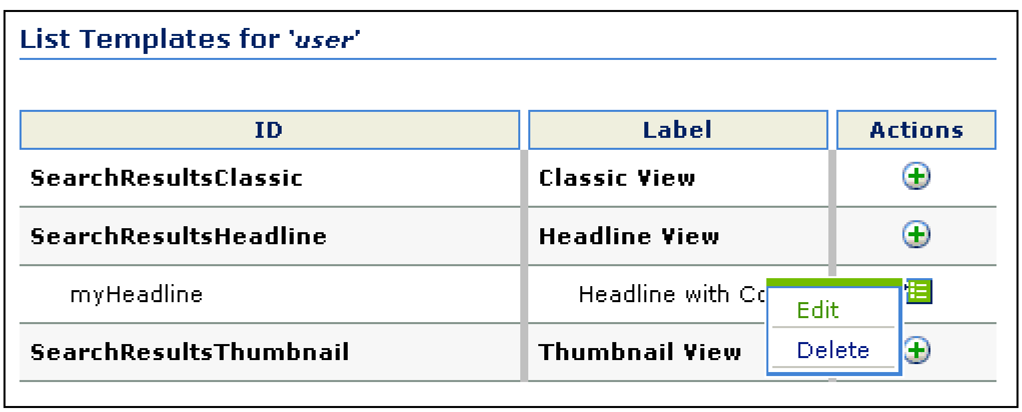
Feature	Description
My Search Result Templates	Displays the *Search Result Templates for 'user' page* (page 4-21), from which you can build custom search results views based on the provided *Classic*, *Headline*, and *Thumbnail* templates.

Search Result Templates

Search Result templates determine what content item information is listed on a search results page and how that information is displayed. You can create custom search result templates using the Search Result Templates for 'User' Page (page 4-21) to identify the information and specify display options. Custom templates are based on one of three provided default templates:

- Classic View Template (page 4-23)
- Headline View Template (page 4-25)
- Thumbnail View Template (page 4-26)

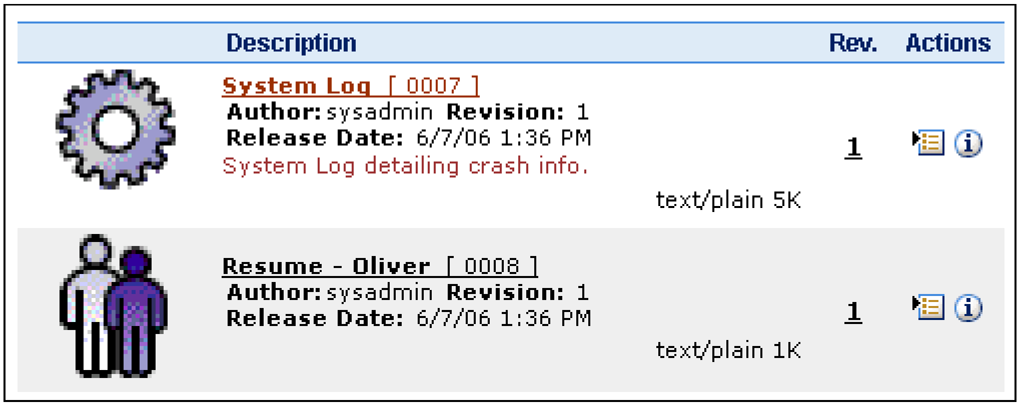
Search Result Templates for '*User*' Page



The *Search Result Templates for 'user'* page displays a list of all templates currently available and provides the option to add, edit, or delete custom templates based on the provided ones. The provided templates cannot be modified. The *Search Result Templates for 'user'* page is accessed by clicking *My Search Result Templates* in the My Content Server Tray (page 4-20), or by clicking *Search Result Templates* on the Portal Design Page (page 4-45).

Column	Description
ID	The template ID uniquely identifies the template. Custom template IDs are specified on the Create/Edit Classic View Search Result Template Page (page 4-28) when the template is added. The provided template IDs are displayed in bold. Custom templates are indented below the provided template on which they are based.
Label	The template label is listed in the *Actions* drop-down list on a search results page and in the Search Template drop-down list on the User Profile Page (page 4-15). It should be something that helps you remember what the template does. The label is specified on the Create/Edit Classic View Search Result Template Page (page 4-28) when the template is added.
Actions	Action icons allow you to add, edit, or delete custom templates. **Add** ( )—Displays the Create/Edit Classic View Search Result Template Page (page 4-28), allowing you to add a custom template. **Item Action menu** ( )—Displays drop-down list with the following links: • *Edit*—Displays the Create/Edit Classic View Search Result Template Page (page 4-28) for the selected custom template. • *Delete*—Deletes the custom template.

Classic View Template

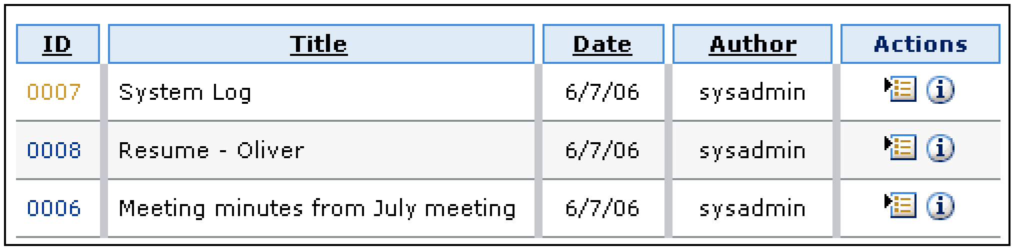


The Classic template lists content items sequentially in single rows, based on the default sort field and order set on the User Profile Page (page 4-15). It displays the following information:

Column	Description
Content Icon or Thumbnail image	An icon based on the content type is displayed. Optionally, if your system administrator has set up Content Server to create a thumbnail image of the content, then the thumbnail image is displayed.

Column	Description
Description	Displays the following information: **Title and Content ID**—The title and unique identifier of the content item, linked to display a web-viewable version of the content, if it is available. If no web-viewable version is available, it is linked to the native file. **Note:** The title and content ID are displayed in all custom search result templates based on the Classic View, even if those fields are not specifically selected from the *Available Fields* section of the Create/Edit Classic View Search Result Template Page (page 4-28). **Author**—The person who checked in the content item. **Revision**—Identifies the revision number of the content item. **Release Date**—The date the content item was released. **Comments**—Comments entered when the item was checked in, if any. **Content Format**—The format of the native file.
Revision	Displays the revision number of the content item.
Actions	Displays the Item Actions Menu icon() and the Content Information icon(). **Item Action Menu**—Clicking this opens a pull-down menu of actions that can be applied to the selected content item. **Content Information Icon**—Clicking this displays the Content Information Page (page 6-7).

Headline View Template



ID	Title	Date	Author	Actions
0007	System Log	6/7/06	sysadmin	
0008	Resume - Oliver	6/7/06	sysadmin	
0006	Meeting minutes from July meeting	6/7/06	sysadmin	

The Headline template by default lists items in a single line, with a minimum of information to maximize the result list. The list is arranged based on the sort field and order set on the User Profile Page (page 4-15). The quantity listed per page is based on returned results and the number specified as the default result count on the User Profile page. It displays the following information:

Column	Description
ID	A unique identifier of the content item, linked to a web-viewable version of the content item, if it is available. If no web-viewable version is available, it is linked to the native file.
Title	Displays the title of the content item without any associated link.
Date	Displays the date the content item was released.
Author	Displays the user name of the person who last checked in the content item.
Actions	Displays the Item Actions Menu icon() and the Content Information icon(). **Item Action Menu**—Clicking this opens a pull-down menu of actions that can be applied to the selected content item. **Content Information Icon**—Clicking this displays the Content Information Page (page 6-7) of the selected content item.

Thumbnail View Template

The Thumbnail template by default lists items in a grid from left-to-right and top-to-bottom and displays an icon based on the content type, or a thumbnail image of the content if your system administrator has set up Content Server to create one. This template is particularly suited for displaying images and other graphic content. The grid is arranged based on the sort field and order set on the User Profile Page (page 4-15). It displays the following information:

Item	Description
Actions icons	Displays the Item Actions Menu icon ( ) and the Content Information icon ( ). **Item Action Menu**—Clicking this opens a pull-down menu of actions that can be applied to the selected content item. **Content Information Icon**—Clicking this displays the Content Information Page (page 6-7).
Thumbnail Icon or Image	Displays an icon based on the content type or a thumbnail image of the content if your system administrator has set up Content Server to create one, linked to a web-viewable version of the content item, if it is available. If no web-viewable version is available, it is linked to the native file.

Item	Description
Title	Displays the title of the content item without any associated link. To maintain the grid structure, long titles are truncated to a single line. Rolling the mouse over the title expands the text to display the full title.

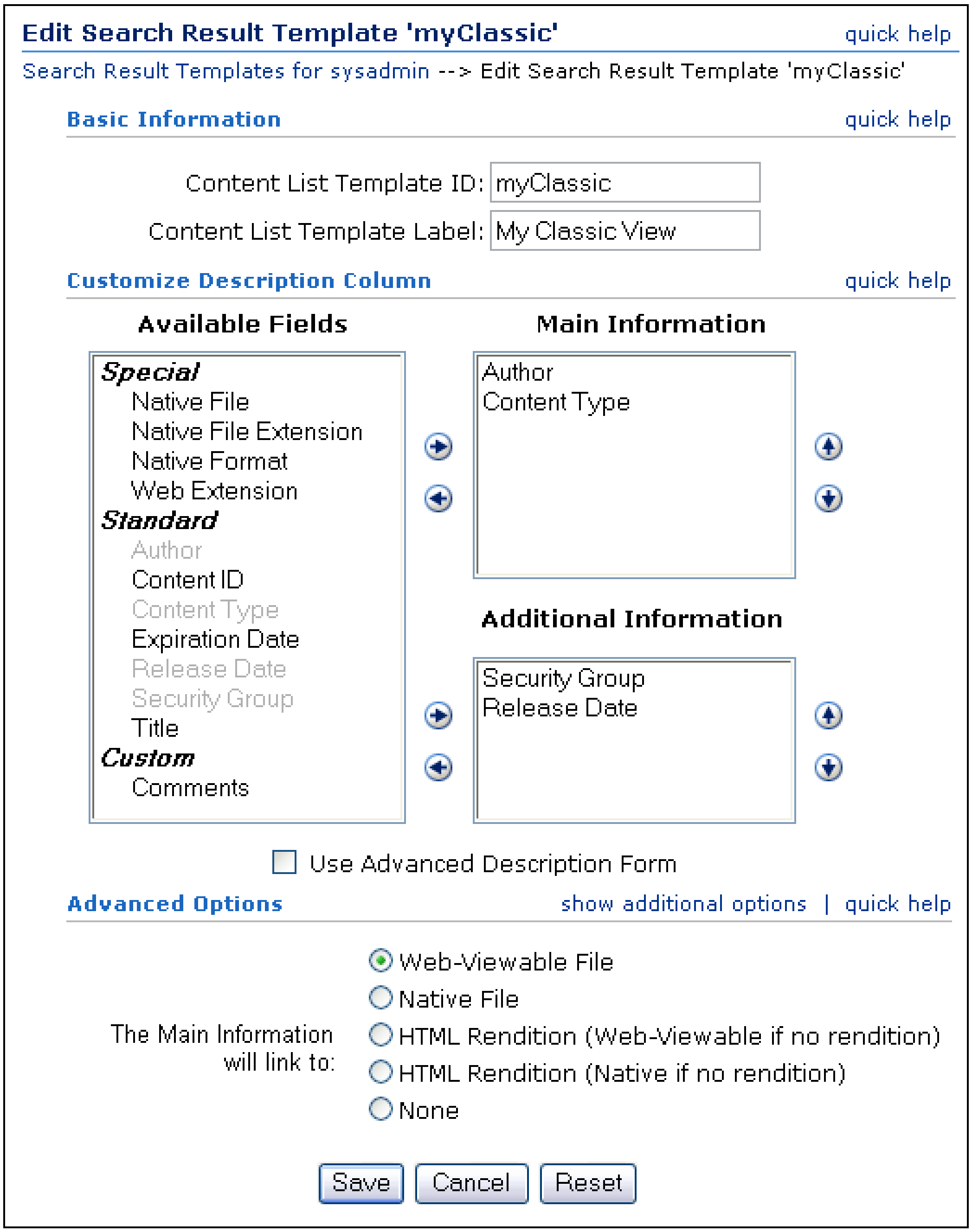
Creating and Editing Custom Search Result Templates

You can personalize how search results are displayed by selecting an option from the Search Template (page 4-18) drop-down list on the User Profile Page (page 4-15), or from the Action Menus (page 5-43) from a search results page. There are three templates available by default, and you have the option to create new views based on the three provided templates. In this way, you can customize the metadata information you want to see on a search result. You can even specify different search results templates to be used for different saved queries.

See Also:

– *Displaying Search Results (page 5-41)*
– *Creating a Custom Search Result Template (page 4-13)*

Create/Edit Classic View Search Result Template Page



The *Create/Edit Classic View Search Result Template* page allows you to add templates based on the Classic View, that specify what content item information is listed on a search results page and how that information is displayed. The *Create/Edit Classic View Search Result Template* page is accessed by clicking the Add Item icon ( ) in the Actions column of the Classic View option on the Search Result Templates for ‘User’ Page (page 4-21).

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of certain links in the display. Once you have created a custom template, you may set that template as your default by setting it on the User Profile Page (page 4-15), or selecting it from the *Actions* drop-down list on any search results page.

There are three main areas of the *Create/Edit Classic View Search Result Template* page:

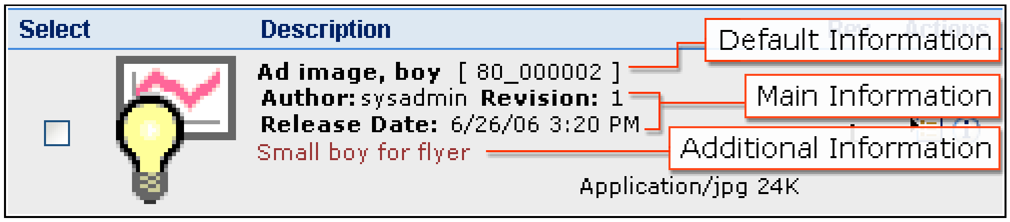
- Basic Information
- Customize Description Column
- Advanced Options

Classic View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>List Template ID</td><td>A unique identifier for the template. It is used by Content Server to manage your custom templates. Alphanumeric characters, underscores and dashes are recommended. The following characters, as well as spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~ | [ ] . ,</td></tr>
<tr><td>List Template Description</td><td>A descriptive identifier for the template, displayed on the User Profile page and in the Actions drop-down menu on any search results page. Alphanumeric characters are recommended. Spaces may be used.</td></tr>
</table>

Classic View Customize Description Column



This area determines what content is displayed in the description column of a Classic View search result template.

Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow ( ) moves the field to the Columns box. Each available field can only be included once in either the *Main Information* section or *Additional Information* section, unless the *Use Advanced Description Form* check box is enabled. **Special**—Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. • *Native File* • *Native File Extension* • *Native Format* • *Web Extension* • *Web File Size* • *Vault File Size* **Standard**—The standard Content Server information fields. • *Author* • *Content ID* • *Content Type* • *Expiration Date* • *Release Date* • *Security Group* • *Title* **Custom**—*Comments* and any custom fields created by your system administrator. **Note:** The title and content ID are displayed in all custom search result templates based on the Classic View, even if those fields are not specifically selected from the *Available Fields* section. If the title or content ID is selected, it will be duplicated.

Item	Description
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Additional Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Use Advanced Description Form	Enabling this option displays an advanced version of the *Main* and *Additional Information* fields. When enabled, the code for the display of each available field moved to the *Main* or *Additional Information* sections is shown and can be edited directly. Additionally, any item from the *Available Fields* section can be included in both the *Main* or *Additional Information* sections multiple times.

Classic View Advanced Options

Item	Description
The content ID column will link to	Determines what happens when you click on the Content ID if it is displayed in a custom search results view. **Web-Viewable File**—Displays a web-viewable version of the content item. **Native File**—Displays or downloads the native file. **HTML Rendition (Web-Viewable if no rendition)**—Displays the web-viewable version of a content item if it is available, otherwise it attempts to convert the original content item to HTML for display. **HTML Rendition (Native if no rendition)**—Displays the web-viewable version of a content item if it is available, otherwise it downloads the native file. **None**—Removes any link to the content ID. For example, select this if you do not want the Content ID link active, or if you are linking the content ID to another item, such as the Content Information page, using Idoc Script.
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page is displayed.

Create/Edit Headline View Search Result Template Page

The *Create/Edit Headline View Search Result Template* page allows you to add templates based on the Headline View, that specify what content item information is listed on a search results page and how that information is displayed. The *Create/Edit Headline View Search Result Template* page is accessed by clicking the Add Item icon ( ) in the Actions column of the Headline View option on the Search Result Templates for 'User' Page (page 4-21).

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of any links in the display. Once you have created a custom template, you may set that template as your default by setting it on the User Profile Page (page 4-15), or selecting it from the *Actions* drop-down list on any search results page.

There are four main areas of the *Create/Edit Headline View Search Result Template* page:

- Basic Information
- Customize Columns
- Customize Description Column
- Advanced Options

Headline View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

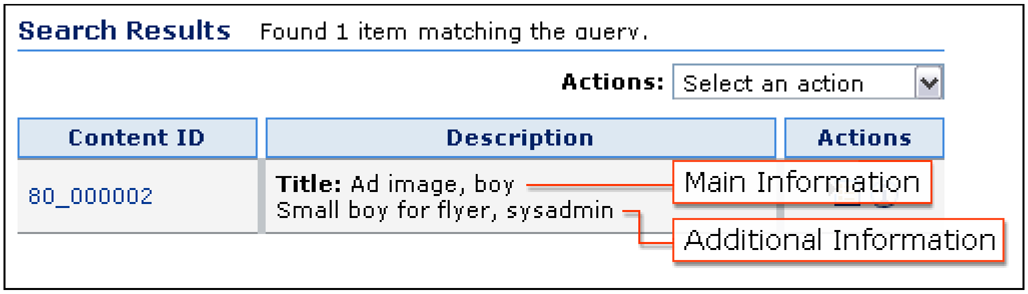
Item	Description
List Template ID	A unique identifier for the template. It is used by Content Server to manage your custom templates. Alphanumeric characters, underscores and dashes are recommended. The following characters, as well as spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~ | [ ] . ,
List Template Description	A descriptive identifier for the template, displayed on the User Profile page and in the Actions drop-down menu on any search results page. Alphanumeric characters are recommended. Spaces may be used.

Headline View Customize Columns

The *Customize Columns* are is only available for custom templates based on the provided *Headline View* template. Use it to determine the columns displayed and their order on a search result page.

Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow ( ) moves the field to the *Columns* box. **Special**—Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. • *Native File* • *Native File Extension* • *Native Format* • *Web Extension* • *Web File Size* • *Vault File Size* **Standard**—The default Content Server information fields: • *Author* • *Content ID* • *Content Type* • *Expiration Date* • *Release Date* • *Security Group* • *Title* **Custom**—*Comments* and any custom fields created by your system administrator.
Columns	Lists the fields you selected to display as a separate column on a search results list. Selecting a field in this box and clicking the up or down arrow allows you to adjust the columns order. Selecting a field in this box and clicking the left arrow ( )removes the field, preventing it from being displayed as a separate column.

Headline View Customize Description Column



This area determines what content is displayed in the description column of a Headline View search result template. The Description field must be selected in the *Customize Columns* section for display on a search results page for this section to have any effect.

Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow ( ) moves the field to the Columns box. Each available field can only be included once in either the *Main Information* section or *Additional Information* section, unless the *Use Advanced Description Form* check box is enabled. **Special**—Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. • *Native File* • *Native File Extension* • *Native Format* • *Web Extension* • *Web File Size* • *Vault File Size* **Standard**—The standard Content Server information fields: • *Author* • *Content ID* • *Content Type* • *Expiration Date* • *Release Date* • *Security Group* • *Title* **Custom**—*Comments* and any custom fields created by your system administrator.
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.

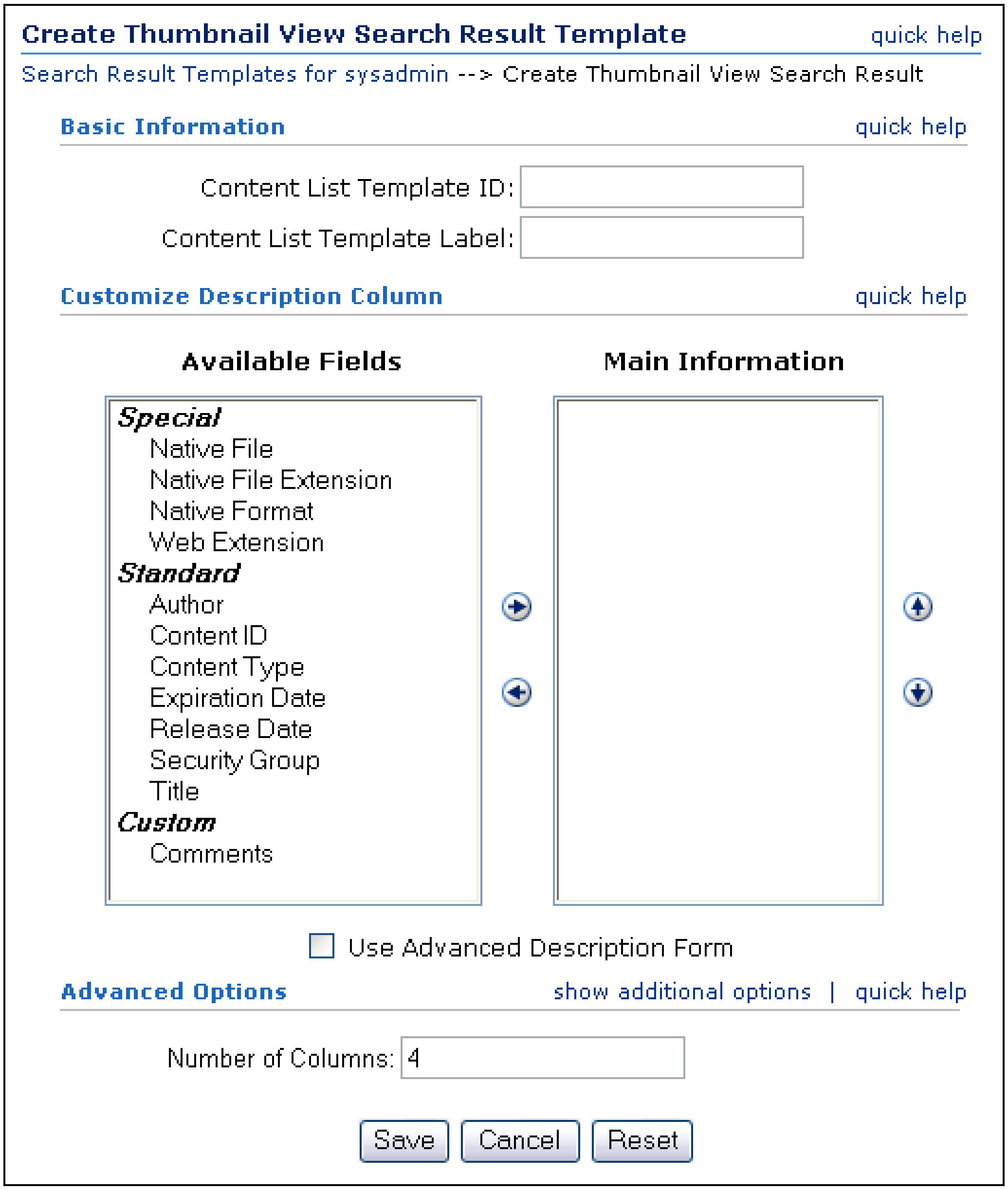
Item	Description
Additional Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Use Advanced Description Form	Enabling this option displays an advanced version of the *Main* and *Additional Information* fields. When enabled, the code for the display of each available field moved to the *Main* or *Additional Information* sections is shown and can be edited directly. Additionally, any item from the *Available Fields* section can be included in both the *Main* or *Additional Information* sections multiple times.

Headline View Advanced Options

Item	Description
The content ID column will link to	Determines what happens when you click on the Content ID if it is displayed in a custom search results view. **Web-Viewable Fil**e—Displays a web-viewable version of the content item. **Native File**—Displays or downloads the native file. **HTML Rendition (Web-Viewable if no rendition)**—Displays the web-viewable version of a content item if it is available, otherwise it attempts to convert the original content item to HTML for display. **HTML Rendition (Native if no rendition)**—Displays the web-viewable version of a content item if it is available, otherwise it downloads the native file. **None**—Removes any link to the content ID. For example, select this if you do not want the Content ID link active, or if you are linking the content ID to another item, such as the Content Information page, using Idoc Script.

Item	Description
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page is displayed.
Number of Columns (Thumbnail-based templates only)	Specifies the number of columns across the result grid.

Create/Edit Thumbnail View Search Result Template Page



The *Create/Edit Thumbnail View Search Result Template* page allows you to add templates based on the Thumbnail View, that specify what content item information is listed on a search results page and how that information is displayed. The *Create/Edit Thumbnail View Search Result Template* page is accessed by clicking the Add Item icon

( ) in the Actions column of the Thumbnail View option on the Search Result Templates for 'User' Page (page 4-21).

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of any links in the display. Once you have created a custom template, you may set that template as your default by setting it on the User Profile Page (page 4-15), or selecting it from the *Actions* drop-down list on any search results page.

There are three main areas of the *Create/Edit Thumbnail View Search Result Template* page:

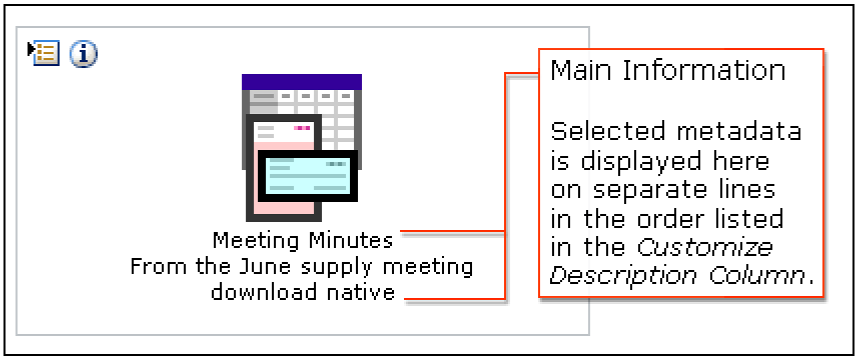
- Basic Information
- Customize Description Column
- Advanced Options

Thumbnail View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

Item	Description
List Template ID	A unique identifier for the template. It is used by Content Server to manage your custom templates. Alphanumeric characters, underscores and dashes are recommended. The following characters, as well as spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~	[ ] . ,
List Template Description	A descriptive identifier for the template, displayed on the User Profile page and in the Actions drop-down menu on any search results page. Alphanumeric characters are recommended. Spaces may be used.

Thumbnail View Customize Description Column



This area determines what content is displayed in the description column of a Headline View search result template. The Description field must be selected in the *Customize Columns* section for display on a search results page for this section to have any effect.

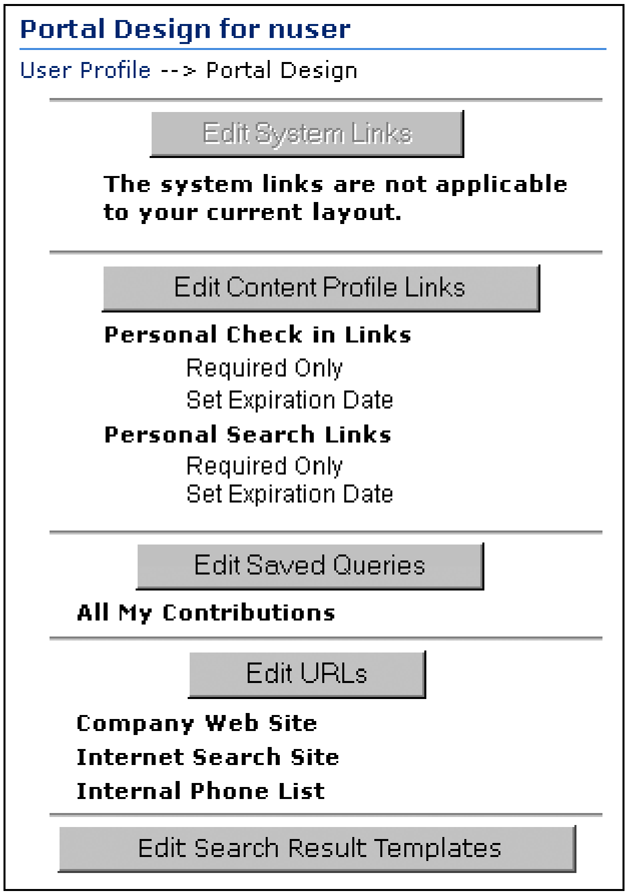
Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow ( ) moves the field to the Columns box. Each available field can only be included once in either the *Main Information* section or *Additional Information* section, unless the *Use Advanced Description Form* check box is enabled. **Special**—Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. • *Native File* • *Native File Extension* • *Native Format* • *Web Extension* • *Web File Size* • *Vault File Size* **Standard—**The standard Content Server information fields: • *Author* • *Content ID* • *Content Type* • *Expiration Date* • *Release Date* • *Security Group* • *Title* **Custom—***Comments* and any custom fields created by your system administrator.
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.

Item	Description
Use Advanced Description Form	Enabling this option displays an advanced version of the *Main Information* field. When enabled, the code for the display of each available field moved to the *Main Information* section is shown and can be edited directly. Additionally, any item from the *Available Fields* section can be included in both the *Main Information* section multiple times.

Thumbnail View Advanced Options

Item	Description
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page is displayed.
Number of Columns	Specifies the number of columns across the result grid.

Portal Design Page

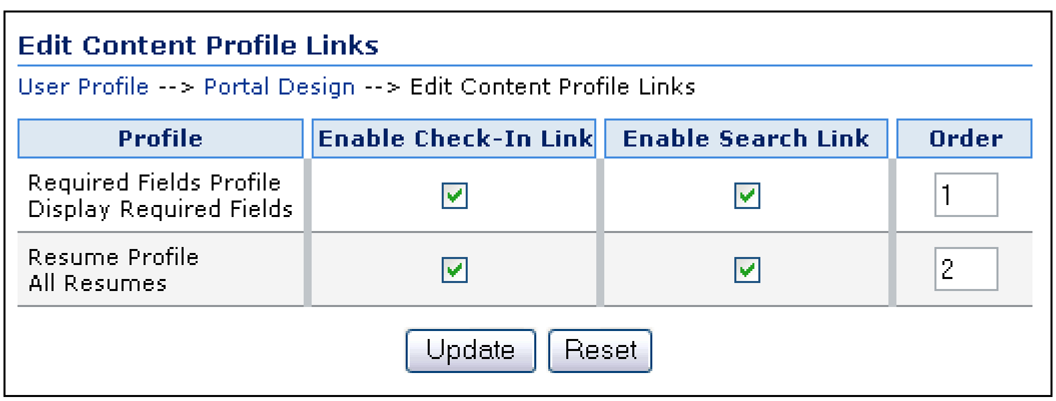


The Portal Design page is used to personalize your portal navigation bar. To access this page, click the **Portal Design** link on the user profile (page 4-15).

Feature	Description
Edit System Links button	This link is unavailable if you are using a layout style other than Classic. If you are using the Classic layout, this link displays the System Links page, which enables you to place links to various system functions in your portal navigation.

Feature	Description
Edit Content Profile Links button	Displays the Portal Content Profiles page (page 4-46), which enables you to select which check in and search profiles are displayed under the Search and New Check In menus on the Toolbar (page 4-5). Check in and search page profiles are defined by your system administer, and are enabled to display by default.
Edit Saved Queries button	Displays the Saved Queries page (page 4-47), which enables you to modify and delete the saved queries that are displayed in the My Content Server tray (page 4-20).
Edit Personal URLs button	Displays the Personal URLs page (page 4-49), which enables you to display URL links under the My Content Server tray (page 4-20), similar to bookmarks in a browser.
Edit Search Result Templates	Displays the Search Result Templates for 'User' Page (page 4-21), from which you can create new or edit existing list templates.

Edit Content Profile Links Page

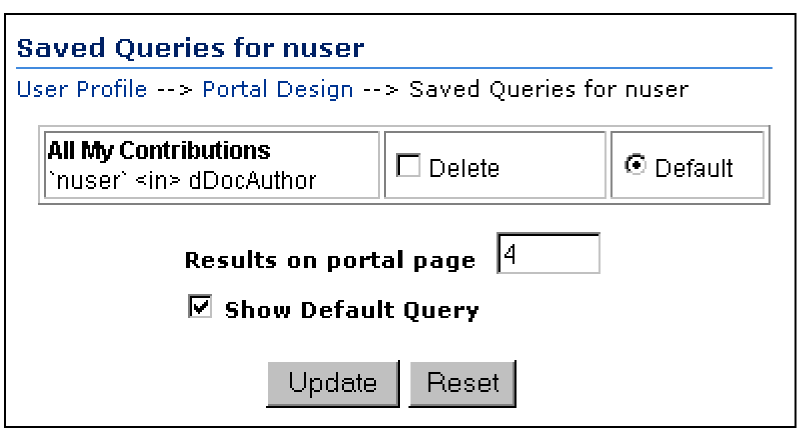


The Edit Content Profiles page displays a list of all profiles defined by your system administrator. It is accessed by clicking **Edit Content Profile Links** on the Portal Design Page (page 4-45). Content profiles determine what metadata fields are displayed and how they are grouped and titled on the associated check in, search, and information pages, based on rules defined by the system administrator. By default, all profiles are enabled for display.

Tech Tip: Using a content profile link to check in or search for content can help you define and display the most critical metadata fields necessary for those tasks. This can help you use Content Server more effectively.

Item/Column	Description
Breadcrumbs	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a breadcrumb link displays the page named by the link.
Profile	The name and description of the profile.
Enable Check-In Link	Displays the content profile as a link in the New Check In menu on the toolbar.
Enable Search Link	Displays the content profile as a link in the Search menu on the toolbar.
Order	Defines the order in which profiles are displayed in the Search and New Check In menus, from top to bottom.
Update	Submits any changes made to previous selections.
Reset	Clears any changes made to existing selections.

Saved Queries Page

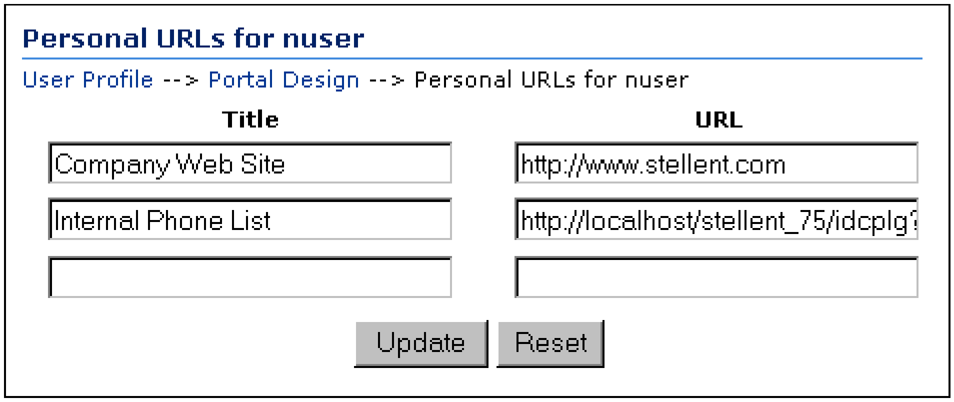


The Saved Queries page is used to modify and delete the saved queries that are displayed in your portal navigation bar. To access this page, click **My Saved Queries** under the **My Content Server** tray in the portal navigation bar (page 4-3), or **Edit Saved Queries** on the Portal Design page (page 4-45).

Note: See Saving a Query (page 5-58) for information on how to save a query link in your portal navigation bar.

Feature	Description
Breadcrumbs	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a breadcrumb link displays the page named by the link.
Queries	Lists the queries you have saved.
Delete check box	The selected query links will be deleted when you click the Update button.
Default option	Selects the query link that will be displayed in a different color in the portal navigation bar if the Show Default Query check box is selected.
Results on Portal Page field	Indicates the number of content items for the default query that will be displayed on the portal page (home page) if the Show Default Query check box is selected.
Show Default Query check box	Select this check box to display the results of the selected default query on the portal page (home page). The default query link will be displayed in a different color in your portal navigation bar.
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.

Personal URLs Page



The Personal URLs page is used to save links to websites in your portal navigation bar. To access this page, click **My Urls** under the **My Content Server** tray in the portal navigation bar (page 4-3), or **Edit Personal URLs** on the Portal Design page (page 4-45).

Feature	Description
Breadcrumbs	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a breadcrumb link displays the page named by the link.
Title field	The link that will appear in your portal navigation bar.
URL field	The complete Uniform Resource Locator (URL) of the website. For example: *http://www.oracle.com*.
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.

Chapter

5

FINDING FILES

OVERVIEW

Content Server uses a database set up by your system administrator to keep track of the metadata entered when a content item is checked in. If your system administrator has also enabled full-text capability, then the text of content items is indexed and made available for searching as well. The following databases are compatible with Content Server:

- MS SQL Server 2000 SP4
- MS SQL Server 2005
- Oracle (versions 9.2 and 10g)
- IBM DB2 (versions 8.1 and 8.2)
- Sybase Adaptive (version 15)

Check with your system administrator to see which database is being used.

Note: Content Server does not support full-text search with Sybase Adaptive database. For all other databases, full-text search must be enabled by the system administrator.

Options for Finding Content

There are several ways to find files in Content Server:

- Browsing to content (page 5-2)—This enables you to find a file by navigating through a hierarchical link structure that has been set up by your system administrator.
- Searching by metadata (page 5-3)—This enables you to find a file based on information about the file.

❖ Searching for specific text (page 5-10)—This enables you to find a file based on the actual text in the file.

You can also search for a file using a combination of metadata and specific text search criteria.

Note: If your system administrator has configured the content server to search database metadata only, then you will not be able to search for specific text. Additionally, Content Server can integrate with other search engines. Check with your system administrator to see what options are available to you.

See Also

– *Searching Metadata (page 5-3)*

– *Working with Search Results (page 5-39)*

– *Searching Referenced Links (optional) (page 5-46)*

– *Saving Queries (page 5-57)*

BROWSING TO CONTENT

This section covers the following topics:

❖ Browsing Content to Find a File *(page* 5-2*)*

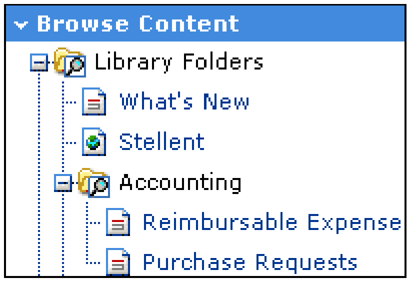
❖ Browse Content Tray *(page* 5-3*)*

Browsing Content to Find a File

Use the following procedure to find information by browsing content:

1. Click the Browse Content tray in the portal navigation bar to expand the tray.
2. Scan the list of folders until you find the one you are looking for.
3. Click the plus sign (+) next to the folder to expand the folder contents and continue drilling down through the folders until you reach a link to one of the following:
   - a search results page (page 5-42),
   - a different website
   - a content server report

Browse Content Tray



Browsing content in Content Server is similar to looking for a paper document in your organization's file cabinets. In a file cabinet, you find the file drawer, then the folder, then the document. In Content Server, you find documents and links to websites in folders in the Browse Content tray.

Library Folders

The Browse Content tray is set up in a hierarchical link structure (the "Library"), where each folder level is based on metadata. The Library Folder is set up by default. Your system administrator determines the hierarchy of any folders within the Library Folder. Clicking the plus sign (+) next to a collapsed folder will expand the contents of the folder. Clicking the minus sign (–) next to an expanded folder will collapse it. Clicking a link in the last folder of a hierarchy will take you to one of the following:

❖ A list of content items that match the folder's metadata and that you have permission to view

❖ A website

❖ A report that provides information about content items, users, metadata fields, or other content server elements.

See Also

– *Browsing Content to Find a File (page 5-2)*

SEARCHING METADATA

This section covers the following topics:

About Metadata Searching

Metadata searching is similar to finding a book in a library by searching for its author, title, or subject. When you search by metadata, you specify as much information as you know about a file or a group of files. For example, if you want to find all files written by your supervisor for your department that were released on or after 1/1/2002, you would specify the following on the search page:

- Author: *supervisor's user name*
- Department: *department name*
- Release Date From: *1/1/2002*

Note: When searching for metadata, case sensitivity and wild card options will vary depending on how your system administrator has configured the content server. See your system administrator for your specific configuration.

Performing a Metadata Search

Use the following procedure to search for files using metadata as the search criteria:

1. Display the home page search fields (page 5-29) or the Search tray (page 5-30).
2. Enter your search criteria in the metadata search fields (page 5-36).
   - Select the appropriate metadata search operators (page 5-5).
   - Use metadata wildcards (page 5-6) as necessary.
   - Keep metadata search case sensitivity (page 5-6) in mind.
3. Select the results options (page 5-40) for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the search results page (page 5-42).

Metadata Search Operators

On the advanced search page (page 5-34), search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in drop-down lists to the left of each field.

Operator	Description	Example
Substring	Finds content items with the specified string anywhere in the metadata field. This has the same effect as placing a wildcard before and after the search term. This is the default operator.	When *form* is typed in the Title field, the search returns items with words such as *forms*, *performance*, and *reform* in their title.
Matches	Finds items with the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items with the exact title of *Address Change Form*.
Starts	Finds items with the specified value at the beginning of the metadata field. This has the same effect as placing a wildcard after the search term when using the Matches operator.	When *form* is typed in the Title field, the search returns all items with titles that begin with the word *form*, including *forms*, *forming*, etc.
Ends	Finds items with the specified value at the end of the metadata field. This has the same effect as placing a wildcard before the search term when using the Matches operator.	When *form* is typed in the Title field, the search returns all items with titles that end with the word *form*, such as *form*, *perform*, *chloroform*, etc.
Not Substring	Finds content items that do not have the specified string anywhere in the metadata field.	When *form* is typed in the Title field, the search returns items without words such as *forms*, *performance*, and *reform* in their title.
Not Matches	Finds items that do not have the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items without the exact title of *Address Change Form*.

Metadata Search Case Sensitivity

Case sensitivity for metadata searches varies depending on how your system administrator has configured the content server.

Note: See your system administrator for your specific configuration.

SQL Server

If the content server is using database searching with SQL Server, metadata searches are not case-sensitive.

Oracle

If the content server is using database searching with Oracle, metadata searches are always case-sensitive. This is in contrast to full-text searches, which are not case-sensitive when Oracle database searching is used.

DB2

If the content server is using database searching with DB2, metadata searches are case-sensitive.

Metadata Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. You can use wildcards in metadata searches, even when using the Quick Search field. However, wildcards entered into the Quick Search field are evaluated differently depending on the search engine used. See Wildcards and Quick Search *(page* 5-27*)* for more information.

Database Metadata Wildcards

If the content server is configured to use database search, the following wildcards can be used in metadata search fields:

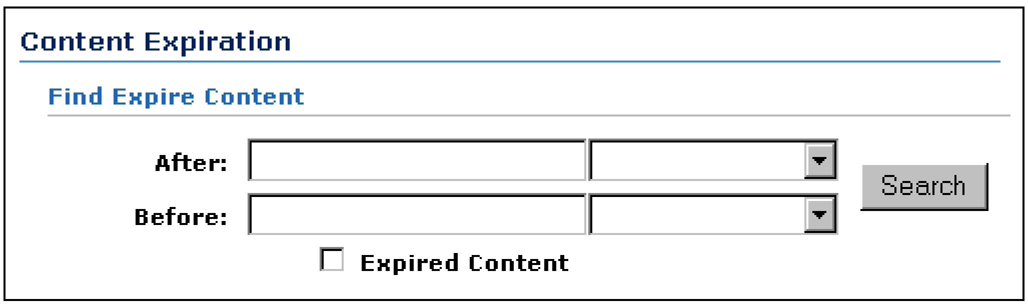
- An **percent sign (%)** stands for zero or more alphanumeric characters. For example:
  - *form%* matches *form* and *formula*
  - *%orm* matches *form* and *reform*
  - *%form%* matches *form*, *formula*, *reform*, and *performance*

❖ An **underscore (_)** stands for one alphanumeric character. For example:
  - *form_* matches *forms* and *form1*, but not *form* or *formal*
  - *__form* matches *reform* but not *perform*

Searching for Expired Content

By default, you can not search for expired content unless you have administrative rights to Repository Manager; however, your system administrator may have permitted specific users to view and work with expired content.

Expired Content Page



To display the Expired Content page, click the **Content Management** tray, and click **Expired Content**.

Feature	Description
Expired Content area	Displays all expired content in the content server repository when the Search button is clicked.
Expiring Content area	Displays all expiring content in the content server repository when the Search button is clicked.

Feature	Description
Find Expired Content area	Used to search the content server repository for content that has already expired. **Before/After choice list:** Limits search results to content that expired before or after the specified date. **Date field:** Specifies the date. **Date choice list:** Fills in the Date field with a date relative to current date and time. **Search button:** Displays search results of expired content that meets the date criteria in the Expired Content area above the form.
Find Expiring Content area	Used to search the content server repository for content that will expire at a specified time in the future. **From field:** Limits search results to content that will expire after the specified date. If this field is blank, the current date and time are used by default. **To field:** Limits search results to content that will expire before the specified date. **Choice lists:** Fills in the Date field with a date relative to the current date and time. **Search button:** Displays search results of expiring content that meets the date criteria in the Expiring Content area above the form.

Searching for Expired Content

Use the following procedure to search for content that has already expired:

1. Log in to the content server.
2. Click **Content Manager** in the left navigation bar.
3. Click Expired Content on the Content Management page.

   The Expired Content Page *(page* 5-7*)* is displayed.
4. In the Find Expired Content area, select **Before** or **After** from the choice list.

5. Enter a date in the empty field. You can type in the date or select a relative date from the choice list.
6. Click **Get Expired**.

   The search results page displays all content that expired before or after the specified date.

Searching for Content About to Expire

Use the following procedure to search for content that will expire at a specified time in the future:

1. Log in to the content server.
2. Click **Content Manager** in the left navigation bar.
3. Click **Expired Content** on the Content Management page.

   The Expired Content Page *(page* 5-7*)* is displayed.
4. In the Expiring Content area, enter a date in the **From** field and/or the **To** field. You can type in the date or select a relative date from the choice list.
5. Click **Get Expiring**.

   The search results page displays all content that will expire within the specified time period.

SEARCHING FULL-TEXT

This section covers the following topics:

About Full-Text Searching

Full-text searching enables you to find a content item based on the text contained in the file itself. When a content item is checked into the content server, the indexer stores all of the words in the web-viewable version of the content item (PDF, HTML, text, or other supported file formats) in an index. When you perform a full-text search, the search expression is compared with the index, and any content items and discussions that contain your search text are returned in the search results.

A full-text search expression can include the following elements:

- **Strings**—partial words (such as *addr*)
- **Words**—individual whole words (such as *addresses*)
- **Phrases**—multiple-word phrases (such as *new addresses*)
- **Operators**—logic applied to words and phrases (such as *news AND addresses*)

See Full-Text Search Rules *(page* 5-10*)* for more information.

See Also

– *Performing a Full-Text Search (page 5-16)*

– *Additional Search Capabilities (page 5-16)*

Full-Text Search Rules

The following search rules will help you refine your full-text search criteria:

- You can use wildcards in full-text search queries, but the various full-text search engines use different wildcards:
    - SQL Server Database Full-Text Wildcards *(page* 5-12*)*

  - Oracle Database Full-Text Wildcards *(page* 5-13*)*.
  - DB2 Database Full-Text Wildcards *(page* 5-15*)*

- ❖ You can use search operators in full-text search queries, but the various full-text search engines use different operators:
  - SQL Server Database Full-Text Search Operators *(page* 5-12*)*
  - Oracle Database Full-Text Search Operators *(page* 5-14*)*.
  - DB2 Database Full-Text Search Operators *(page* 5-15*)*
- ❖ Internet-Style Search Syntax (page 5-17) is supported for full text searching.
- ❖ When you perform a full-text search, the search finds the word you specify **and** words that have the same "stem". For example, searching for the word *address* finds files with the word *address*, *addressing*, *addresses*, and *addressed* in them. If you want to limit the search to the word you specify, place the word in double quotes (for example, *"address"*).
- ❖ You can sort full-text search results by the number of occurrences of the search terms and the proximity of the search terms when an operator such as <NEAR> is used. Select the **Score** option from the **Sort By** list on the search results page (page 5-42).

Full-Text Search Case Sensitivity

Case sensitivity for full-text searches varies depending on how your system administrator has configured the content server. By default, Content Server is configured to use database searching. If the content server is using database searching with SQL Server, Oracle, or DB2, full-text searches are not case-sensitive.

If an optional search engine has been installed and configured for use with Content Server, then case sensitivity rules will depend on the engine being used.

Note: See your system administrator for your specific configuration.

Tech Tip: Generally, you should use all lowercase search strings to ensure that you find all of the files that match your search expression. Use mixed-case search strings **only** if you are looking for a specific combination of lower case and upper case.

SQL Server Database Full-Text Search Options

This section covers the following topics:

❖ SQL Server Database Full-Text Wildcards *(page* 5-12*)*

❖ SQL Server Database Full-Text Search Operators *(page* 5-12*)*

SQL Server Database Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in SQL Server database full-text search fields (only when used following a prefix):

❖ An **asterisk (*)** stands for zero or more alphanumeric characters. For example:

- *form** matches *form*, *formal*, and *formula*

SQL Server Database Full-Text Search Operators

The following operators can be used to refine your SQL Server database full-text search expression.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.
AND NOT	Finds content items that contain the first term, but not the second term.	*address AND NOT name* returns content items that contain the first word, but not both words.
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
“phrase”	Finds content items that contain the phrase specified between the quotes.	*“address change”* returns content items that contain the exact specified phrase.

Operator	Description	Example
NEAR	Finds content items that contain the specified terms in close proximity to each other.	*internet NEAR server* returns content items that contain the specified words close to one another.
ISABOUT(term1, term2)	Finds content items that contain the specified terms and ranks them based on the specified method.	*ISABOUT(address, name)* returns items containing both *address* and *name*, and ranks the results based on how well they meet the criteria specified in the ranking method.
"PREFIX*"	Finds content items that contain the term specified between the quotes as a prefix to the wildcard.	*"form*"* returns content items that contain words with *form* as a prefix, for example, *forms, formal, formula,* but not words with form as a substring, such as *inform*, *uniform*, or *reformation*.
Note: The * wildcard can be used in full-text searches only when following a prefix.		

Oracle Database Full-Text Search Options

This section includes these topics:

- ❖ Oracle Database Full-Text Wildcards *(page* 5-13*)*
- ❖ Oracle Database Full-Text Search Operators *(page* 5-14*)*
- ❖ Oracle Full-Text Highlighting (page 5-14)

Oracle Database Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in Oracle database full-text search fields:

- ❖ A **percent (%)** equals zero or more alphanumeric characters.
- ❖ An **underscore (_)** equals exactly one alphanumeric character.

Oracle Database Full-Text Search Operators

The following operators can be used to refine your Oracle database full-text search expression.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
NOT	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	*NOT server* returns content items that do not contain the word *server*. *internet NOT server* returns content items that contain the word *internet* and do not contain the word *server*.
NEAR(term1, term2)	Finds content items that contain the specified terms in close proximity to each other. Terms that are closer together receive a higher score.	*NEAR(internet,server)* returns content items that contain the specified words close to one another.
ISABOUT(phrase)	Finds content items that contain the phrase specified in the parenthesis.	*IS ABOUT(changed address)* returns content items that contain specified phrase.

Oracle Full-Text Highlighting

Search terms can be highlighted in the returned text, provided the content server is using Oracle database full-text search and your administrator has enabled the functionality. Forward (>>) and back (<<) navigation links bracket the highlighted text. Clicking the links will take you to the next and previous result in the text.

DB2 Database Full-Text Search Options

This section includes these topics:

DB2 Database Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in Oracle database full-text search fields:

- A **percent (%)** equals zero or more alphanumeric characters.
- An **underscore (_)** equals exactly one alphanumeric character.

DB2 Database Full-Text Search Operators

The following operators can be used to refine your DB2 database full-text search expression.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	**Description**	**Example**
AND	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
NOT	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	*NOT server* returns content items that do not contain the word *server*. *internet NOT server* returns content items that contain the word *internet* and do not contain the word *server*.

Operator	Description	Example
“phrase”	Finds content items that contain the phrase specified between the quotes.	*“address change”* returns content items that contain the exact specified phrase.
NEAR(term1, term2)	Finds content items that contain the specified terms in close proximity to each other. Terms that are closer together receive a higher score.	*NEAR(internet,server)* returns content items that contain the specified words close to one another.
ISABOUT(phrase)	Finds content items that contain the phrase specified in the parenthesis.	*IS ABOUT(changed address)* returns content items that contain specified phrase.

Performing a Full-Text Search

Use the following procedure to perform a full-text search:

1. Display the Quick Search field (page 5-19), home page search fields (page 5-29), Search tray (page 5-30), or advanced search page (page 5-34).
2. Enter your search terms in the full-text search field.
   - Take the full-text search rules (page 5-10) into account.
   - Keep full-text search case sensitivity (page 5-11) in mind.
3. Select the results options (page 5-40) for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the search results page (page 5-42) or in the Results tab (page 5-32) under the Search tray in the Portal Navigation Bar.

ADDITIONAL SEARCH CAPABILITIES

This section covers the following topics:

❖ Internet-Style Search Syntax (page 5-17)

❖ Complex Queries and Alternate Query Formats (page 5-18)

Internet-Style Search Syntax

Search techniques common to the popular internet search engines are supported in Content Server. For example, typing *new product* in the Quick Search field will be interpreted as *new* <AND> *product*, while typing *new, product* is interpreted as *new* <OR> *product*. The following tables lists how common characters are interpreted by Content Server.

Character	Interpreted As
Space ( )	AND
Comma (,)	OR
Minus (-)	NOT
Phrases enclosed in double-quotes ("*any phrase*")	exact match of entered phrase

The following table lists examples of how searching full-text is interpreted with internet-style syntax.

Query	Interpreted As
new product	`new <AND> product`
new, product images	`new <OR> product <AND> images`
new product -images	`new <AND> product <AND> <NOT> images`
"new product", "new images"	`"new product" <OR> "new images"`

The following table lists examples of how searching the title metadata using the substring operator is interpreted with internet-style syntax.

Query	Interpreted As
new product	`dDocTitle <substring> 'new' <AND> dDocTitle <substring> 'product'`
new, product	`dDocTitle <substring> 'new' <OR> dDocTitle <substring> 'product'`

Query	Interpreted As
new -product	`dDocTitle <substring> 'new' <AND> <NOT> 'product'`
"new product"	`dDocTitle <substring> 'new product'`

Note: Internet-style search syntax is enabled by default, but may be disabled by your system administrator. Check with your system administrator if you have questions.

Complex Queries and Alternate Query Formats

Content Server allows for the use of parenthesis for complex query construction, as well as *field:value* and *site:value* formats when creating a query. By using these alternatives, you can more easily search the metadata field you want across multiple servers, if necessary, and refine your results. For example, if you want to search only the title metadata for "*new product*" without having to go to the Advanced Search page, you can do so by entering `dDocTitle:"new product"` into the Quick Search field. The search will be limited to the field you specified prior to the colon. You must know the Content Server identifier for the metadata field you want to search.

Similarly, the *site:value* format allows users to specify enterprise search targets as well. For example, if you have a master instance and a proxy instance, where the master is configured to use Enterprise Search against the proxy, you can use the following query can be entered into the Quick Search field of the master instance to search the proxies:

```
site:master,proxy dDocTitle:"new product"
```

In the above example, "master" and "proxy" must be the names of the search providers or of aliases defined for them.

The following table lists some examples of complex and alternate query formats.

Query	Interpreted As
dDocTitle:New	`dDocTitle <contains> `New``
dDocTitle:New product	`(dDocTitle <contains> `New`) <AND> <ftx>`product`</ftx>`

Query	**Interpreted As**
dDocTitle:New dDocTitle:product	dDocTitle <contains> `New` <AND> dDocTitle <contains> `product`
dDocTitle:New,dDocTitle:product	dDocTitle <contains> `New` <AND> dDocTitle <contains> `product`
dDocTitle:New dDocType:Presentations	dDocTitle <contains> `New` <AND> dDocType <contains> `Presentations`
dDocTitle:New,dDocType:“Test Plan”	dDocTitle <contains> `New` <OR> dDocType <contains> `Test Plan`

Search Pages

You can perform a content item search from the following places in the Content Server interface:

- Quick Search Field *(page* 5-19*)*
- Home Page Search Fields *(page* 5-29*)*
- Search Tray *(page* 5-30*)*
- Advanced Search Page *(page* 5-34*)*
- Search Links Page *(page* 5-47*)*

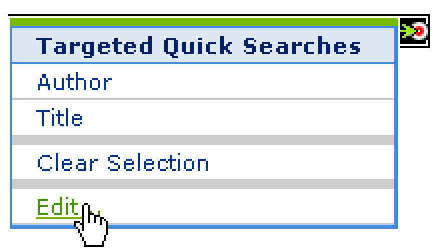
Quick Search Field

The quick search field enables you to perform a search regardless of what page is displayed in the content area. The Quick Search field searches the title and content ID metadata, as well as indexed full-text if it is supported on your system.

You or your system administrator can also build custom searches targeted to search one or more metadata fields you specify, and make them available through the Quick Search field. Targeted searches can be created using either the Query Builder Form (page 5-38) or Expanded Form (page 5-35) on the Advanced Search Page (page 5-34).

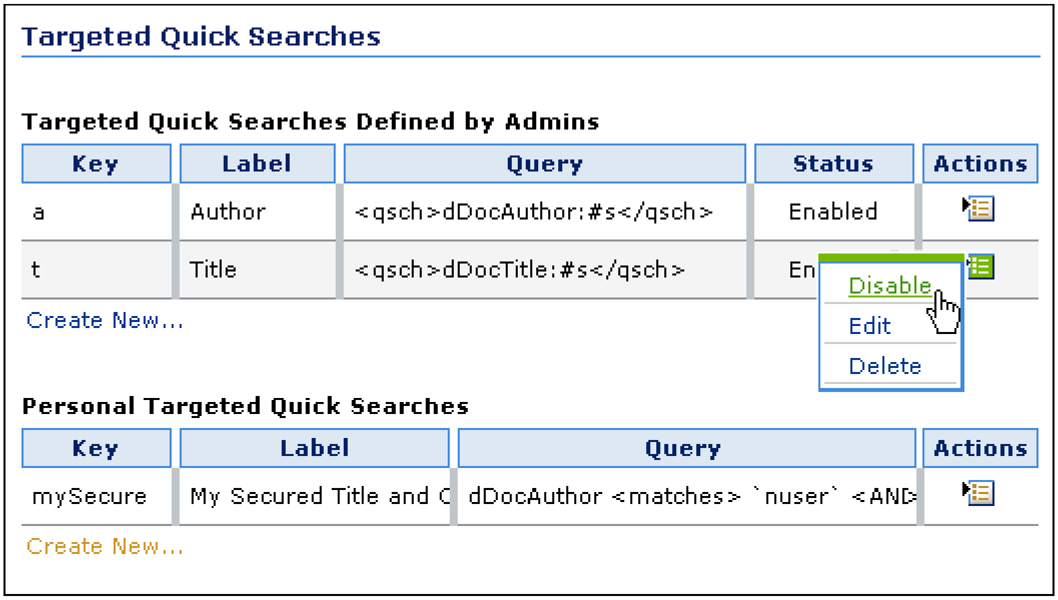
Internet-style search syntax is supported in the Quick Search field, as is complex construction and alternate query formats. For more information, see Additional Search Capabilities (page 5-16).

Note: If you have changed your layout to the Classic layout, you may need to enable the Quick Search field by selecting the Quick Search check box on your System Links page.

Item	Description
Text entry field	Enter search terms in this field for searching the title and content ID metadata, as well as the full-text index.
Targeted Quick Search Action icon ( )	Displays the Targeted Quick Search Actions menu, which lists the available targeted searches and links to edit them or clear the current selection. Once selected, the targeted search remains persistent until it is cleared or replaced. The name of the selected targeted search is displayed to the left of the icon. If the targeted search is cleared, a quick search reverts to the default behavior of searching content ID, title, and full-text (if enabled.) **Targeted Quick Search List**—Displays a list of available searches. Selecting a search enables it in the quick search field. **Clear Selection**—Clears the current targeted quick search and returns the quick search field to the default behavior. **Edit**—Displays the Targeted Quick Searches Page (page 5-22), from which you can add additional edit existing targeted quick searches. **Figure 5-3** Targeted Quick Search Action Icon Menu 

Item	Description
Tech Tip: You can run a targeted search from the quick search field without selecting it by entering the targeted search key into the quick search field, followed by a space and the search criteria. Previously selected targeted searches must be cleared first. For example, to run a targeted search with the key *title* for all content with the word *Moose* in the title, ensure previous targeted searches are cleared and enter **title Moose** into the quick search field. For this reason, it is a good idea to use easily remembered keys when creating targeted quick searches.	
Quick Search button	Displays a search results page that lists the content items that contain the search terms.
XML Document Type list	Provides a list of selectable XML document types. By default, the searchxml option is selected. If an XML document type is not selected from the list, the component performs a metadata search in the stored documents and returns all results. In this case, there are no limits on the query. If you select one or more document types and enter a search term in the text entry field, the component performs a full-text search in the selected document types.
Note: To support full-text searches, at least one XML document type must be selected. Any document type included in the list indicates that it has been full-text indexed.	

Targeted Quick Searches Page



Targeted quick searches specify which metadata fields to search when text is entered into the quick search field, and any additional criteria to be run when a quick search is used. Targeted quick searches can be created by you or your system administrator. The Targeted Quick Search page lists all targeted quick searches, and is accessed by selecting *Edit* from the targeted quick search action icon menu.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Key</td><td>A unique identifier for each targeted quick search. Alphanumeric characters, underscores and dashes are recommended. The following characters, as well as spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~ | [ ] . ,

Caution: If the key to a personal targeted quick search is identical to a key used in a quick search defined by an administrator, the personal targeted quick search will be executed even if the administrator-defined quick search is selected.

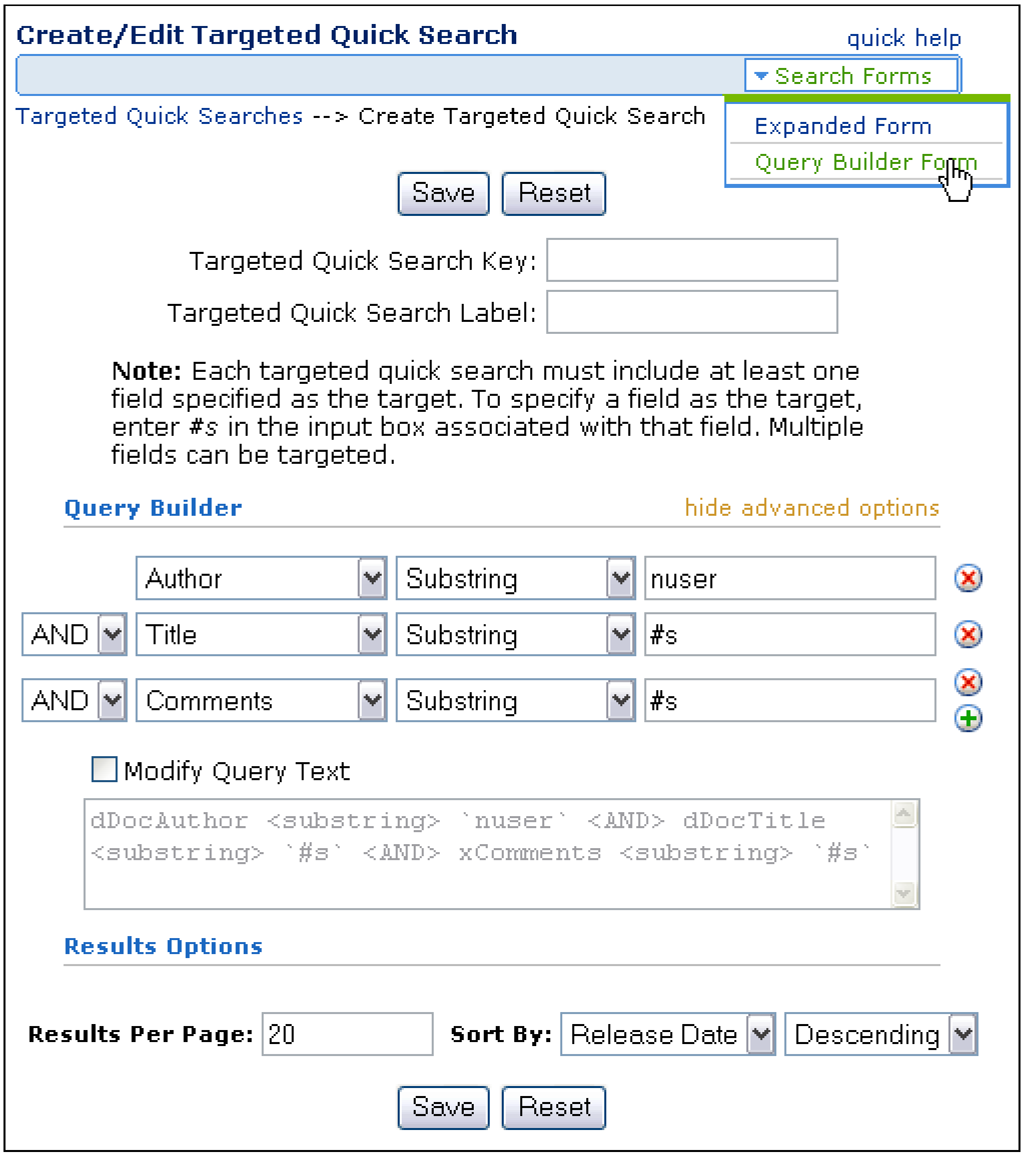
Tech Tip: The key can be entered into the quick search field, followed by a space and the search criteria to run a targeted quick search without first selecting it from the targeted quick search action icon menu. Previously selected targeted searches must first be cleared.</td></tr>
<tr><td>Label</td><td>A descriptive identifier for the targeted search, displayed in the targeted quick search action icon menu. Alphanumeric characters are recommended. Spaces may be used. Multiple targeted searches can have the same label.</td></tr>
<tr><td>Query</td><td>The text of the targeted quick search.</td></tr>
<tr><td>Status</td><td>Indicates whether a targeted search created by an administrator is available for use.

Enabled—The targeted quick search is listed in the targeted quick search action icon menu and can be run from the quick search field.

Disabled—The targeted quick search is not listed in the targeted quick search action icon menu and cannot be run from the quick search field.</td></tr>
</table>

Item	Description
Item Actions Icon ( )	Allows the following actions to be taken **Disable** (*Targeted Quick Searches Defined by Admins section* only)—Prevents the selected quick search from displaying in the targeted quick search action icon menu. Disabled targeted quick searches can still be run by entering the key in the quick search field, followed by a space and the search criteria. **Edit**—Displays the Create/Edit Targeted Quick Search Page (page 5-25) to allow editing of previously defined criteria for the selected targeted search. **Delete**—Removes the selected targeted quick search from the Content Server. Deleted targeted searches are no longer displayed in the targeted quick search action icon menu and cannot be run. Only users assigned the admin role may edit or delete targeted quick searches created by a system administrator.
Create New	Displays the Create/Edit Targeted Quick Search Page (page 5-25) to create a new targeted quick search.

Create/Edit Targeted Quick Search Page



The *Create Targeted Quick Search* page is used to create new targeted quick searches. It is accessed by clicking *Create New* on the Targeted Quick Searches Page (page 5-22). The *Edit Targeted Quick Search* page is used to edit existing targeted quick searches. It is accessed by selecting *Edit* from the targeted quick search action icon menu. Targeted quick searches are displayed in the Quick Search Action menu next to the quick search field.

Item	Description
Actions drop-down list	Determines the search form used to create the targeted search. The default is to the search form type setting on the User Profile Page (page 4-15). **Expanded Form** (page 5-35)—Displays all search field options on a single page, but does not allow the use of <OR> as an operator between fields. Queries constructed with the expanded form assume fields are connected with the <AND> operator. **Query Builder Form** (page 5-38)—Offers available search fields for selection from drop-down lists, and enables field for direct edit of the query text. Also allows the use of <OR> as search operator.
Targeted Quick Search Key	A unique identifier for each targeted quick search. Alphanumeric characters, underscores and dashes are recommended. The following characters, as well as spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~ | [ ] . , If the key to a personal targeted quick search is identical to a key used in a quick search defined by an administrator, the personal targeted quick search will be executed even if the administrator-defined quick search is selected. **Tech Tip:** The key can be entered into the quick search field, followed by a space and the search criteria to run a targeted quick search without first selecting it from the targeted quick search action icon menu. Previously selected targeted searches must first be cleared.
Targeted Quick Search Label	A descriptive identifier for the targeted search, displayed in the targeted quick search action icon menu. Alphanumeric characters are recommended. Spaces may be used. Multiple targeted searches can have the same label.

Item	Description
Search Form	Used to define the criteria of the targeted search. Each targeted quick search must include at least one field specified as the target. To specify a field as the target, enter *#s* in the input box associated with that field. Multiple fields can be targeted.
show/hide advanced options (Query Builder form only)	Toggles between displaying and hiding the Modify Query Text check box and Query Text field. Advanced options are hidden by default.
Modify Query Text	Controls whether the Query Text field is available for entering text directly into the query. **Enabled**—Text can be entered directly into the query text field. **Disabled**—Query text can be seen as gray text, but cannot be edited directly.
Query Text field	Displays the query text as it is being built, or allows user to enter text directly into a query, provided the Modify Query Text check box is enabled.
Results Per Page	Determines the number of results that are displayed on the search results page of a targeted quick search.
Sort By	Determines which of the following options are used to sort the targeted search results, and whether or not those results are listed in ascending or descending (default) order: ❖ Release Date (default) ❖ Title
Saves	Saves and enables the targeted quick search.
Reset	Resets the form.

Wildcards and Quick Search

Different search configurations used with Content Server use different wildcards and evaluate them differently for full-text and metadata. Because the Quick Search Field searches both full-text and metadata, search results from wildcards used in the Quick

Search field will depend on your system configuration. For information about wildcards used with each configuration, see Metadata Wildcards *(page* 5-6*)*, Oracle Database Full-Text Wildcards *(page* 5-13*)*, and DB2 Database Full-Text Wildcards *(page* 5-15*)*.

The following table explains how wildcards in the Quick Search field are evaluated for full-text and metadata in each configuration.

	Oracle	**SQL Server**	**DB2**
Full-text	As wild	* ? As wild, % _ As literal	As wild
Metadata	As wild	* ? As literal, % _ As wild	As wild

Expanded Form Limitations

The Expanded search form combines fields using the <AND> operator, which may have limited value for targeted quick search. For example, if you used the expanded form to create a quick search that targeted both the title and the comments field, the term you searched for would have to be in both fields. It is more likely that you would want to search for a term that is in either the title or the comment fields. To do so, you would need to use the Query Builder form and select the <OR> operator between the fields when creating the search.

See Also

– *Searching Full-Text (page 5-10)*

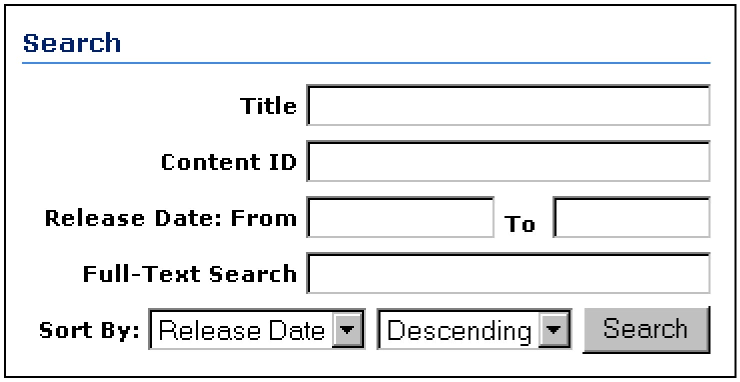
– *Metadata Wildcards (page 5-6)*

– *Oracle Database Full-Text Wildcards (page 5-13)*

– *DB2 Database Full-Text Wildcards. (page 5-15)*

– *Additional Search Capabilities (page 5-16)*

Home Page Search Fields



The home page search fields enable you to perform a metadata search, full-text search, or a combination of both from the content server home page (page 4-6). Only the most commonly used search fields are available from the home page.

Note: Your home page may have a different appearance than the default "out-of-the-box" content server home page, which includes search fields. If search functionality is not available from your home page or if you want to search on additional metadata fields, use the search tray (page 5-30) or Advanced Search page (page 5-34).

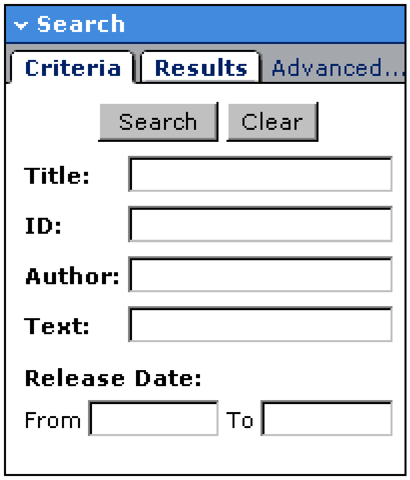
Feature	Description
Title field	A descriptive name for the content item.
Content ID field	The unique identifier for the content item.
Release Date fields	The date that the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.
Full-Text Search field	Enter full-text search terms. For details refer to Searching Full-Text *(page* 5-10*)*.
Note: If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.	

Feature	Description
Sort By list	Specifies the field that the search results will be sorted on: **Release Date (default)**—Sorts by the Release Date metadata field. **Title**—Sorts alphabetically by the Title metadata field.
Order list	Specifies the sort order of the search results: **Descending (default)**—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order. **Ascending**—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order.
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-42).

Search Tray

The Search tray enables you to perform a metadata, full-text, or combination search from the content server's portal navigation bar (page 4-3). Clicking the Search tray will expand or collapse the tray. Only the most commonly used search fields are available from the Search tray.

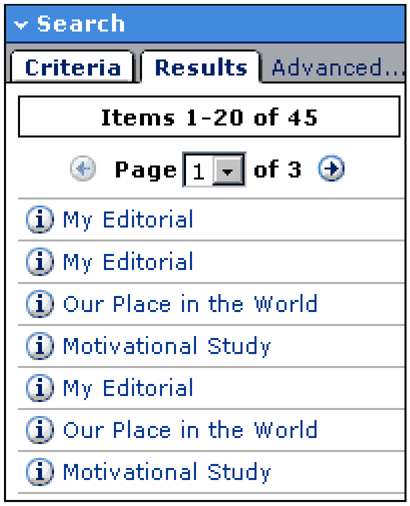
Criteria Tab



The Criteria tab displays the form in which you enter your search criteria.

Feature	Description
Advanced	Displays the Advanced Search page (page 5-34).
Search button	Submits the search criteria entered to the content server.
Clear button	Clears any criteria entered into the search fields.
Title field	A descriptive name for the content item.
ID field	The unique identifier for the content item.
Text field	Enter text search terms. For details refer to Searching Full-Text *(page* 5-10*)*.
Note: If your system administrator has configured the content server to search database metadata only, the Text field will not be displayed.	
Release Date fields	The date that the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.

Results Tab

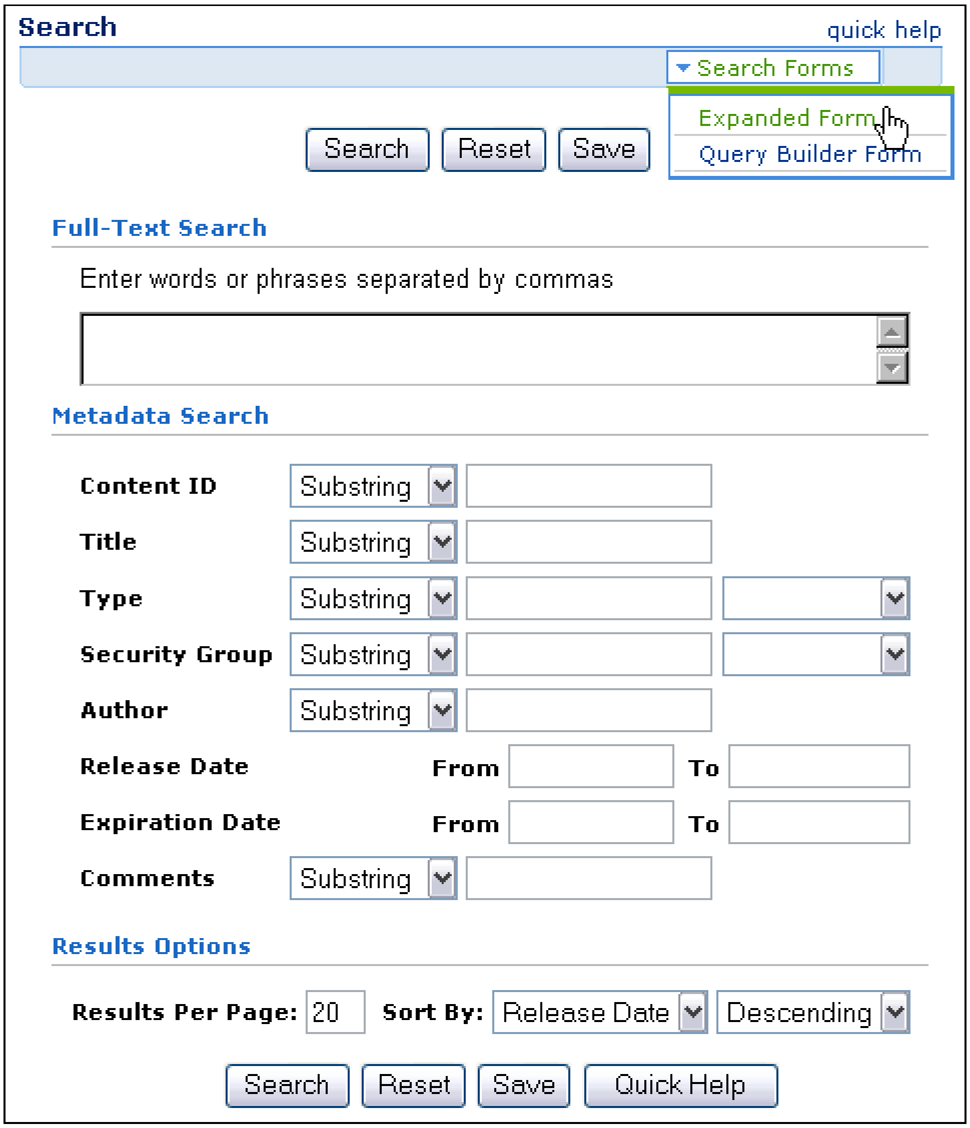


The Results tab is the area where a listing of search results based on the criteria entered in the criteria tab is displayed. The search results remain in the results tab until a new search is performed or the page is refreshed.

Feature	Description
Advanced	Displays the Advanced Search page (page 5-34).
Previous	Returns the search results tab back to the previous results page.
Next	Advances the search results tab to the next page of results.
Arrow buttons	**Forward**—Advances to the next search results page in a series. **Back**—Returns to the previous search results page in a series.
Info icon	Displays the content information of the corresponding content item.
ID field	The unique identifier for the content item.
Text field	Enter full-text search terms. For details refer to Searching Full-Text *(page* 5-10*)*.

Feature	Description
Release Date fields	The date the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.

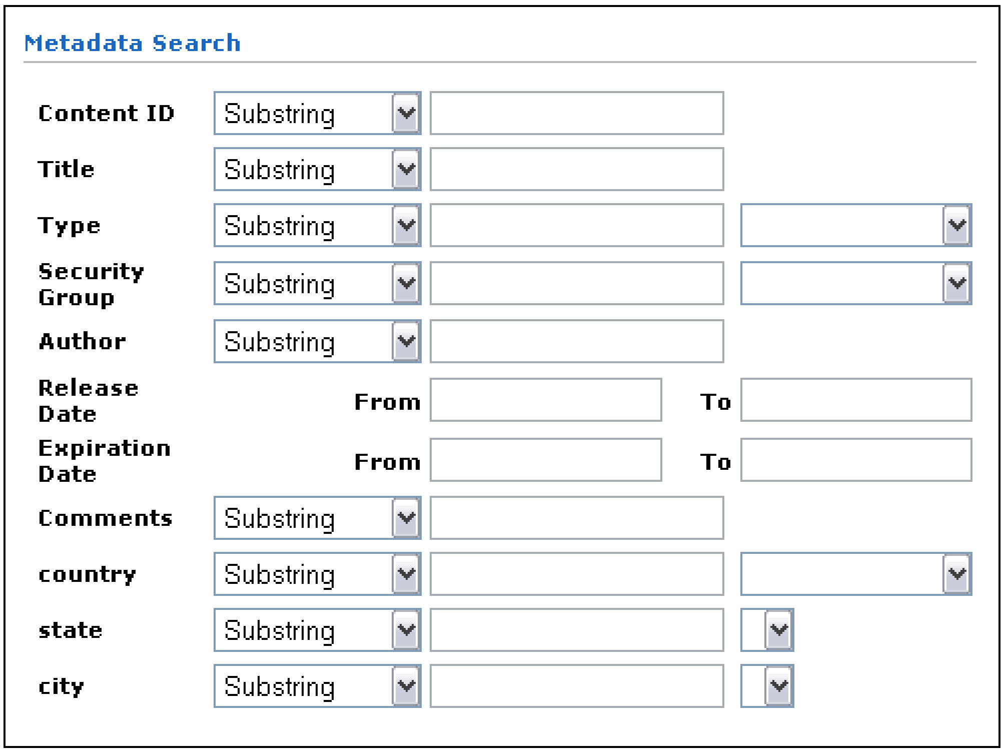
Advanced Search Page



The advanced search page enables you to perform a metadata search, full-text search, or a combination of both on all available fields. You can build your search using either the Expanded Form (page 5-35) to view all criteria options, or the Query Builder Form (page 5-38) to select search criteria from pull-down menus as required. The Query Builder Form also allows you to manually edit the query text. To access this page, click the **Advanced** link under the Search tray (page 5-30) or the **Search** link on the toolbar (page 4-5).

Tech Tip: Using a content profile link under the My Content Server Tray *(*page 4-20*)* to check in or search for content can help you define and display the most critical metadata fields necessary for those tasks. Creating a targeted quick search to pre-define fields searched from the quick search form can also streamline searching for content.

Expanded Form



The expanded form on the Advanced Search Page (page 5-34) displays all search fields available to you on a single page. You can alternate between the expanded form and the query builder form using the Actions menu at the top of the search page.

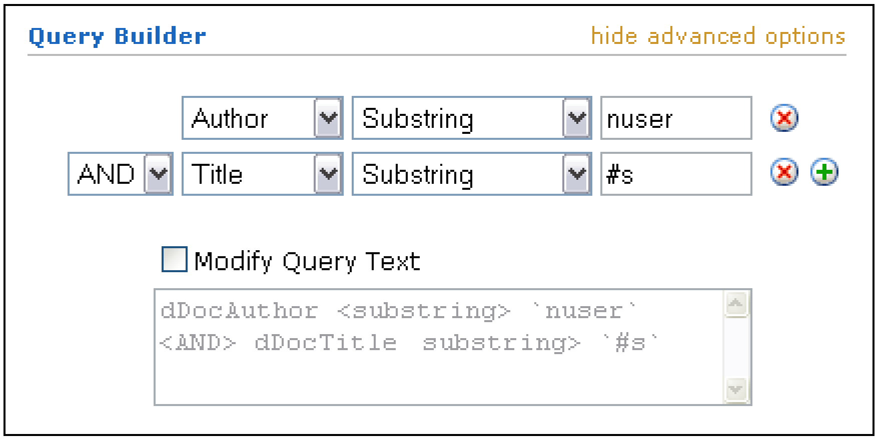
Note: Queries built using the Expanded form separate the metadata fields with the <AND> operator. This means that each search criteria entered into each field must be met for a result to be returned. For example, if "January" is entered into the Title field and "presentation" is entered into the Type field, then a result is returned only if content is both a "presentation" type and has "January" in the title.

Tech Tip: Your User Profile enables you to specify which form is displayed by default on the Advanced Search page. See User Profile Page (page 4-15) for more information.

Feature	Description
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-42). If no search criteria are specified, a list of all content items is displayed.
Clear button	Clears the search fields, but does not reset the results options settings.
Save button	Saves the search as a saved query link in the portal navigation bar (page 4-3). You are prompted to enter a title for the link.
Full-Text Search field (optional)	Enables you to search for words within content items. For details refer to Searching Full-Text *(page* 5-10*)*. Also evaluates IdocScript.
Note: If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.	
Note: The Search tray (page 5-30) and advanced search page (page 5-34) enable you to search on the standard metadata fields listed in the table below. If custom metadata fields have been created for your content server system, they typically will be displayed below the standard metadata fields. For information about the operators used with metadata searching, see Metadata Search Operators *(page* 5-5*)*.	
Content ID	The unique identifier for the content item.
Title	A descriptive name for the content item.
Type	The category of the document. You can enter text or select from the list of predefined values.
Security Group	An identifier that specifies access permission to the content item. You can enter text or select from the list of predefined values.

Feature	Description
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Author	The user who checked in the current content item revision.
Release Date	The date that the current revision was released to the content server. **From**—The search finds content items released on or after this date. **To**—The search finds content items released before (but not on) this date.
Expiration Date	The date that the content item will no longer be available for searching or viewing in the content server. **From**—The search finds content items that will expire on or after this date. **To**—The search finds content items that will expire before (but not on) this date.
Comments	Additional notes about the content item.
Results Options	Enables you to specify how search results are displayed. For details refer to Working with Search Results *(page* 5-39*)*.
Quick Help button	Displays the help topic specific to the advanced search page.

Query Builder Form



The Query Builder form enables you to easily build and save complex queries by selecting options from a series of drop-down lists. Once a query is built using the Query Builder form, you may edit the query directly, perform the search, or save the query for easy access from My Saved Queries or through a targeted Quick Search.

Note: Queries built using the Query Builder form allow you the choice of separating the metadata fields with either the <AND> operator or the <OR> operator. If the <AND> operator is selected, then each search criteria entered into each field must be met for a result to be returned. If the <OR> operator is selected, then only one of each field's criteria must be met. For example, if "January" is entered into the Title field and "presentation" is entered into the Type field, separated by <OR>, then a result is returned if content has either "presentation" as the type or has "January" in the title.

Feature	Description
show/hide advanced options	Toggles between displaying and hiding the Modify Query Text check box and Query Text field.
Metadata drop-down lists	Allows you to choose metadata fields for searching one field at a time.

Feature	Description
Add/Delete icons	Control the display and use of metadata drop-down lists. **Add** ( )—Displays an additional metadata field below the current field. **Delete** ( )—Hides the selected metadata field and removes any query text entered into the field.
Operators	Provide easy selection of search options. Available search operators are dependent on the type of search engine being used. See *Metadata Search Operators (page 5-5)* and *Full-Text Search Rules (page 5-10)* for more information.
Modify Query Text	Controls whether the Query Text field is available for entering text directly into the query. **Enabled**—Text can be entered directly into the query text field. **Disabled**—Query text can be seen as gray text, but cannot be edited directly.
Query Text field	Displays the query text as it is being built, or allows user to enter text directly into a query, provided the Modify Query Text check box is enabled.

WORKING WITH SEARCH RESULTS

This section covers the following topics:

About Search Results

You can specify how to display the results of your search based on the number of content items that you want returned per page and the order in which you want the content items listed. For example, if you are searching for specific text such as *changed address*, then you might want to sort your search results by score. If you want to find the most recent files that match your criteria, you can sort the results by release date.

Results Options

The Results Options area of the Advanced Search Page *(page* 5-34*)* is used to control the display of the Search Results page.

Feature	Description
Results Per Page field	Specifies the maximum number of content items displayed on each search results page. The default is 25, and the range is from 0 to 100.
Sort By list	Specifies the field that the search results will be sorted on: **Release Date (default)**—Sorts by the Release Date metadata field. **Title**—Sorts alphabetically by the Title metadata field. **Score**—Sorts by the number of occurrences of search terms, or the proximity of search terms when a proximity operator such as <NEAR> is used. Applies only to full-text search.

Feature	Description
Order list	Specifies the sort order of the search results: **Descending (default)**—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order. **Ascending**—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order.
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-42). If no search criteria are specified, a list of all content items is displayed.
Clear button	Clears the search fields, but does not reset the results options settings.
Save button	Saves the search as a saved query link in the portal navigation bar (page 4-3). You are prompted to enter a title for the link.

Displaying Search Results

Use the following procedure to specify how to display the search results:

1. Display the home page search fields (page 5-29) or advanced search page (page 5-34).
2. Scroll down to the results options area (page 5-40) .
3. Set the **Results Per Page** to the maximum number of content items that you want to display on each search results page.
4. Specify the **Sort By** method and order.
5. Click **Search**.

Note: The Clear button clears the search fields, but does not clear the Results Options settings.

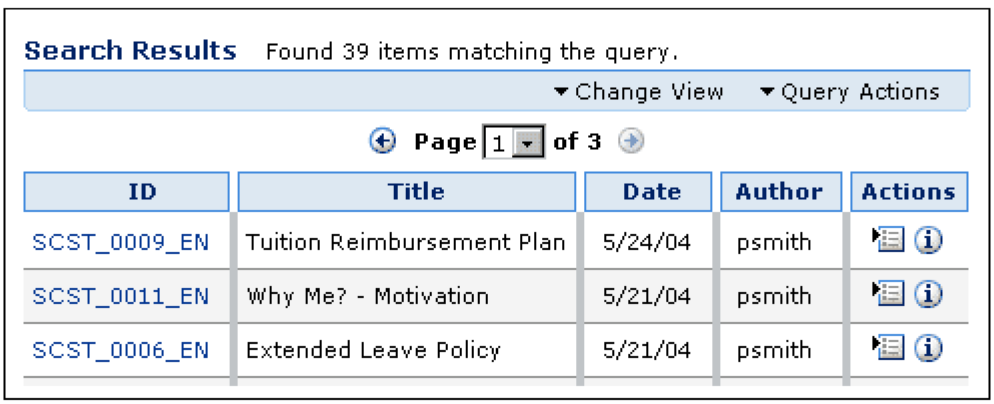
Use the following procedure to specify the search results view:

1. Click on the **Actions** choice list on a search results page (page 5-42) and select the desired view option.

Use the following procedure to change the default search results view:

1. Display the user profile (page 4-15).
2. Scroll down to **Search Template** option.
3. Click the Search Template choice list and select the desired search result view.
4. Click **Update**.

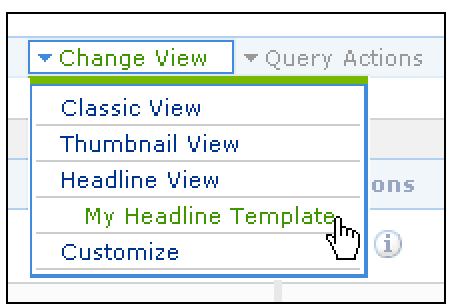
Search Results Page



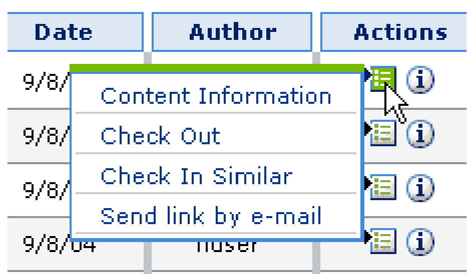
The search results page displays a list of content items that match the criteria specified during a search. You can control how your search results page looks by choosing a default search template on your user profile (page 4-15). You can also change the template by selecting a different view option from the Action choice list on the search results page.

This section describes the search results page.

Feature	Description
Found *x* items matching the query	Shows the number of content items that match the search criteria.

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Arrow buttons</td><td>Forward: Advances to the next search results page in a series.
Back: Returns to the previous search results page in a series.</td></tr>
<tr><td>Action Menus</td><td>Query Actions:
Allows you to select an action to perform on the search results list. Actions include saving the search to the My Content Server tray (page 4-20), or searching within the listed results.
Change View:
Allows you to select a different viewing option for the list:
❖ Classic— A thumbnail image and descriptive text is displayed.
❖ Thumbnail— A thumbnail image is displayed.
❖ Headline— A single line list of search results with no thumbnail image is displayed.
❖ Custom View— Displays custom search results based on a custom list template created on the Create/Edit Classic View Search Result Template Page (page 4-28).
Figure 5-1 The Change View Action Menu with custom view highlighted

</td></tr>
</table>

Feature	Description
ID column	Displays the content ID of a content item. Clicking the content ID of a selected item either displays a web-viewable version of the content, or prompts you to select to save the file to your local drive or open the document with an associated program.
Title column	Displays the title of a content item.
Date column	Displays the date that content item was checked in.
Author column	Displays the author of the content item.

Feature	Description
Actions column	Includes the Info icon and the Actions Menu icon. **Info**— Displays the content information page (page 6-7) for the selected content item. **Item Actions Menu**—Contains the following options: • The Content Information link displays the content information page (page 6-7) for the selected content item. • The Check Out link checks out the selected content item and displays the check-out confirmation page (page 8-11). • The Check In Similar link displays the content check-in form (page 7-7) with some metadata fields already filled in. • The Send Link by E-mail link opens a new e-mail message that contains a URL to the selected content item. **Figure 5-2** The Item Actions Menu 
Thumbnail (Thumbnail and Classic views)	Displays a small image of the content item or an icon indicating the content type of the content item. Clicking the thumbnail of a selected item either displays a web-viewable version of the content, or prompts you to select if you want to save the file to your local drive or open the document with an associated program.

Feature	Description
Description column (Classic view)	Shows the content ID and title of the content item. Clicking the content ID link displays the web-viewable file.
Rev. link (Classic view)	Shows the latest released revision of the content item. Clicking the link displays the revision history page for the content item (page 6-12).
Info icon (Classic view)	Displays the content information page (page 6-7) for the content item.

SEARCHING REFERENCED LINKS (OPTIONAL)

The Link Manager component adds functionality to Content Server, and is available to your system administrator as a bundled option. It is not installed by default. If the optional Link Manager component is installed, it evaluates, filters, and parses the URL links of indexed documents and then extracts the links for storage in a database table, making them available for searching. After the table is populated with the extracted URL links, the Link Manager component references this table to generate link search results, lists of link references for the Content Information page, and the resource information for the Link Info page. The Link Manager component enables you to:

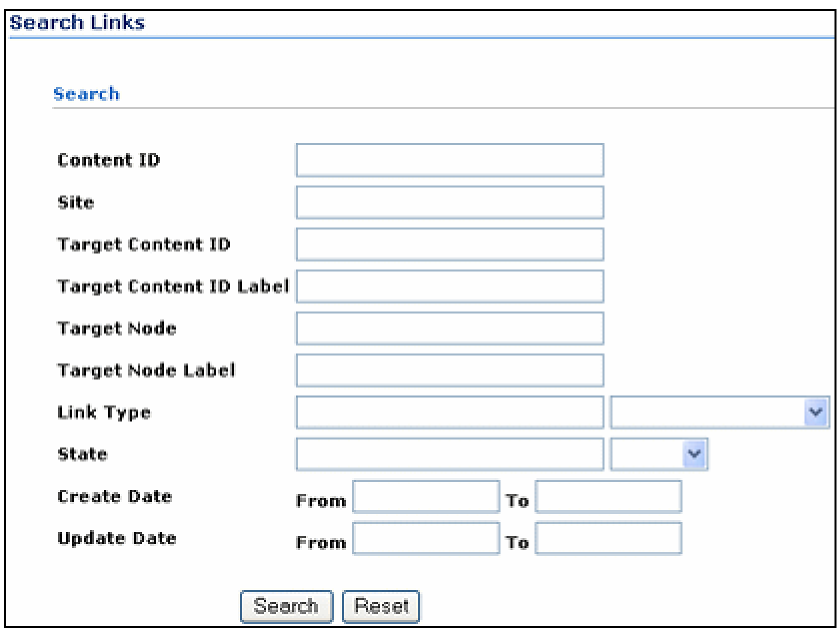
- View lists of links using specific search criteria
- View detailed information about a specific link
- View the links to other documents for a specific content item, and any documents that reference this item.

The search results, link references lists, and Link Info pages are useful to determine what documents are affected by content additions, changes, or revision deletions. For example, before deleting a content item, you can verify that any URL references contained in it are insignificant. Another use might be to monitor how content items are being used.

Note: Because the Link Manager component extracts the URL links during the Content Server indexing cycle, only the URL links of released documents are extracted. For content items with multiple revisions, only the most current released revision will be available for searching.

This section covers the following topics:

Search Links Page

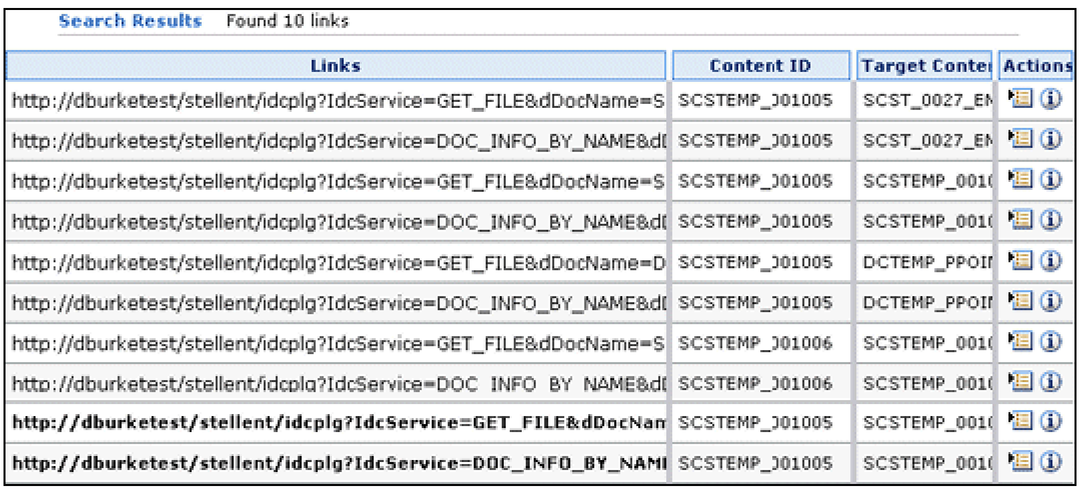


The Search Links page is used to search for links, using criteria stored in the content server repository database. The Search Links page is useful for finding valid or invalid links, to determine where a resource is being used, or to determine how deleting a content item would affect other documents linking to it, etc. If the optional Links Manager component is installed, you can access the Search Links page by clicking the **Managed Links Search** link in the Content Management tray.

Feature	Description
Content ID field	The unique identifier for each content item.
Site field	An identifier for a specific web location that is associated with a link.
Target Content ID field	Associated with links that use the GET_FILE IdcService and refers to the dDocName (Content ID) parameter in the link.
Target Content ID Label field	The label associated with the target content ID. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Target Node field	The node used to display search results. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Target Node Label field	The label associated with the target node. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Link Type field and drop-down option list	Specifies links that are of the type selected from the drop-down option list. Types include service, external, internal, relative, and Site Studio-specific types of Page, Node, Relative, Absolute, and Service links.
State field and drop-down option list	Specifies valid or invalid links.
Create Date From/To fields	Link Manager generates and uses create dates to manage the links and monitor activity performed on the links. Create Date indicates when the link first entered the system (when it was extracted and added to the ManagedLinks table). The From and To fields enable you to specify a date range based on the creation dates of links.

Feature	Description
Update Date From/To fields	Link Manager generates and uses update dates to manage the links and monitor activity performed on the links. Update Date indicates when the link was last updated. The From and To fields enable you to specify a date range based on the update dates of links.
Search button	Initiates the search query using the specified field values.
Reset button	Clears any populated fields on the page.

Link Search Results Page


Search Results Found 10 links

Links	Content ID	Target Conte	Actions
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocName=S	SCSTEMP_J01005	SCST_0027_EN	
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_NAME&dI	SCSTEMP_J01005	SCST_0027_EN	
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocName=S	SCSTEMP_J01005	SCSTEMP_001(	
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_NAME&dI	SCSTEMP_J01005	SCSTEMP_001(	
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocName=D	SCSTEMP_J01005	DCTEMP_PPOII	
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_NAME&dI	SCSTEMP_J01005	DCTEMP_PPOII	
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocName=S	SCSTEMP_J01006	SCSTEMP_001(	
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_NAME&dI	SCSTEMP_J01006	SCSTEMP_001(	
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocNan	SCSTEMP_J01005	SCSTEMP_001(	
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_NAMI	SCSTEMP_J01005	SCSTEMP_001(	

Links that are invalid or broken in a Link Search Results Page are listed using bold font. The Link Manager-specific Item Actions Pop-up Menu *(page* 5-49*)* and Info icons are available in the Actions column. Clicking the Info icon displays the Content Information page of the document containing the link.

Item Actions Pop-up Menu

Clicking the Actions icon displays the applicable link management pop-up menu. The menu options include:

- **Content Information**—displays the Content Information page of the document containing the link. This Content Information page contains a References toggle switch that displays (Show option) or hides (Hide option) any related links contained in or links to this content item. For more information, refer to Link References on Content Information Page *(page* 5-50*)*.
- **Target Content Info**—displays the Content Information page of the document referenced by the link. Again, this Content Information page contains a References toggle switch that displays or hides any related links contained in or links to this content item.
- **Link Info**—displays the Link Info Page *(page* 5-53*)* for this link.

Link References on Content Information Page

If a content item does not contain any references and no other content items reference it, then the References toggle switch is not displayed on its Content Information page. However, if a content item does contain one or more references and/or has links that reference it, the References toggle switch is displayed.

The References toggle switch enables you to see whether the content item references other content items or if it is referenced by other content items. To facilitate this, the References toggle switch has two options:

- **Show**—by default, the links are hidden when the Content Information page opens. Clicking the Show option displays all applicable links. If this content item contains one or more references to other documents, then these links are listed in the Links contained in this content item section. If this content item is referenced by other documents, then these links are listed in the Links to this content item section.

  To see an example of the lists of links included in these sections on the Content Information page, refer to Show Link References *(page* 5-52*)*.
- **Hide**—clicking the Hide option closes the Links contained in this content item section and the Links to this content item section and hides the links.

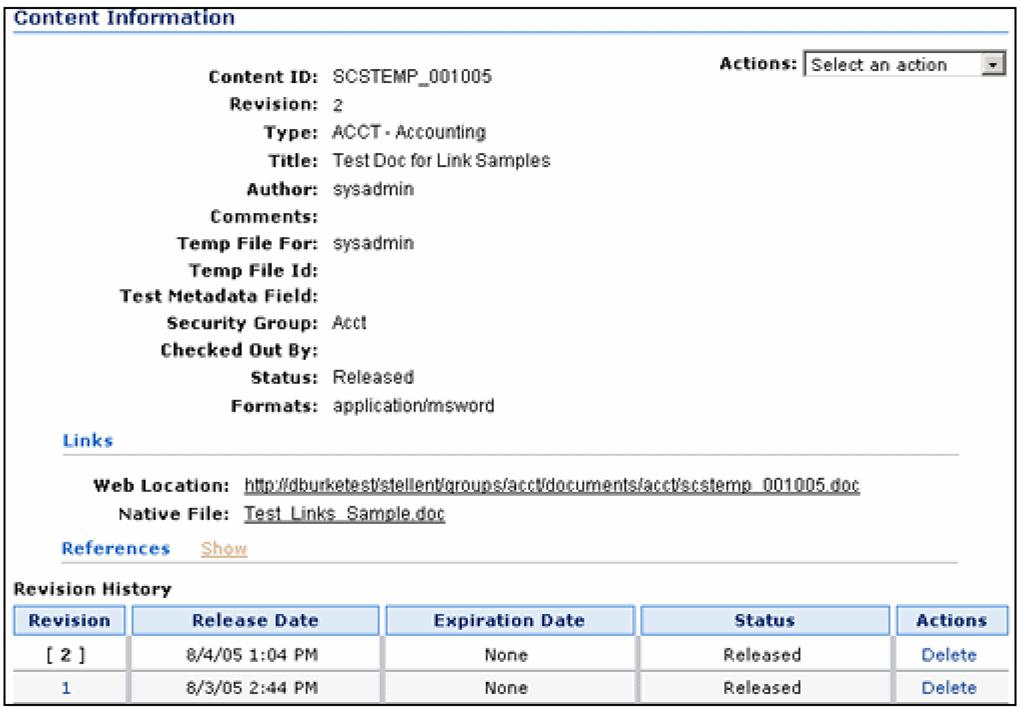
You can access the available link information for content items by clicking any Content Info icon which displays the Content Information page and the References toggle switch. Or, you can select either Content Information or Target Content Info from the Item Actions Pop-up Menu *(page* 5-49*)* which also displays the Content Information page and the References toggle switch.

Note: You will not be allowed to delete a content item revision if it is referenced by other content items unless the system administrator has set the *AllowForceDelete* configuration variable to true. When you delete a content item revision, the message indicates whether the content item is referenced by another content item and asks if you are sure you want to delete it. In this case, deleting a content item that is referenced by another content item breaks those links and makes them invalid.

Clicking the References toggle switch enables you to:

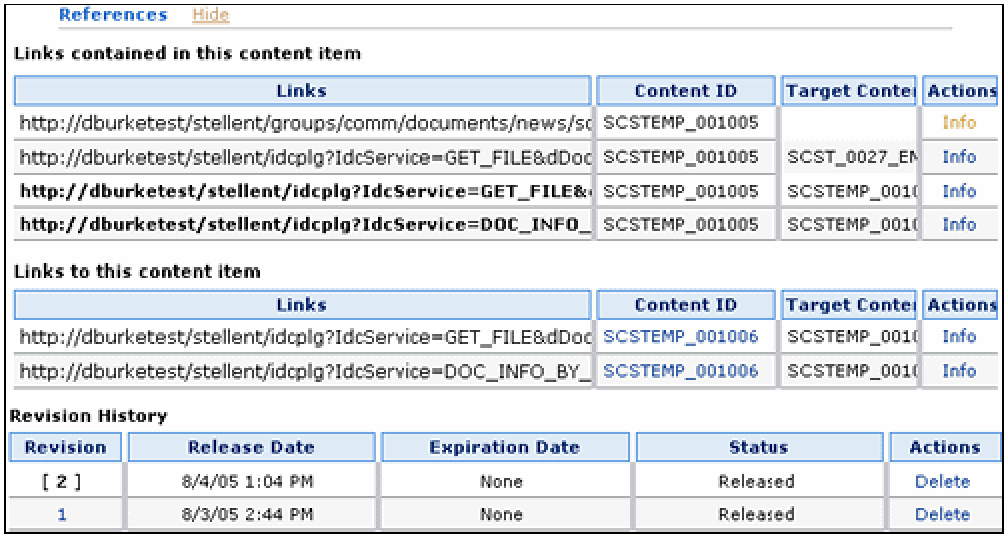
- ❖ Hide Link References *(page* 5-51*)*
- ❖ Show Link References *(page* 5-52*)*

Hide Link References



This is the default display option for the Content Information page when the content item has applicable links associated with it. The References toggle switch is included on the page but the individual sections are not displayed. The Show toggle switch option is activated. Clicking *Show* opens the References sections that list all applicable links associated with the content item—refer to Show Link References *(page* 5-52*)*. For information about accessing the Content Information page and displaying the references, refer to Checking Content Item Link References *(page* 5-55*)*.

Show Link References



References Hide

Links contained in this content item

Links	Content ID	Target Conte	Actions
http://dburketest/stellent/groups/comm/documents/news/sc	SCSTEMP_001005		Info
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDoc	SCSTEMP_001005	SCST_0027_EN	Info
http://dburketest/stellent/idcplg?IdcService=GET_FILE&	SCSTEMP_001005	SCSTEMP_001(	Info
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_	SCSTEMP_001005	SCSTEMP_001(	Info

Links to this content item

Links	Content ID	Target Conte	Actions
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDoc	SCSTEMP_001006	SCSTEMP_001(	Info
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_	SCSTEMP_001006	SCSTEMP_001(	Info

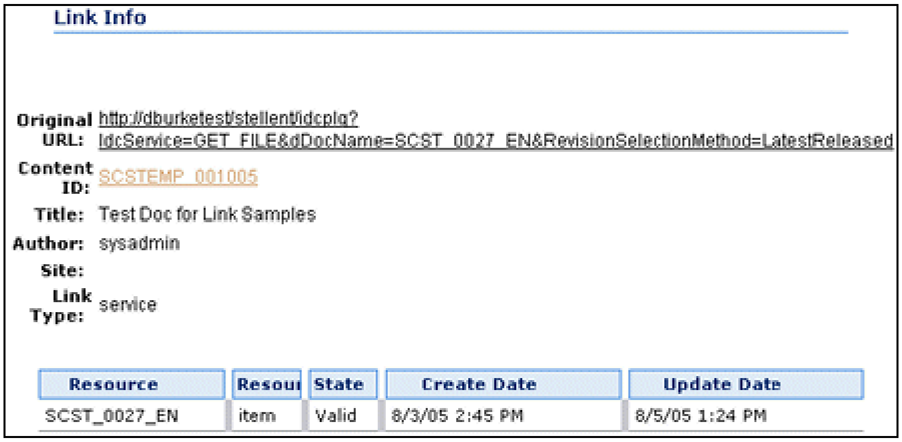
Revision History

Revision	Release Date	Expiration Date	Status	Actions
[2]	8/4/05 1:04 PM	None	Released	Delete
1	8/3/05 2:44 PM	None	Released	Delete

Clicking the Show toggle switch opens the References sections that list all applicable links associated with the content item. The Links contained in this content item section lists all the links contained in this content item that reference other documents. The Links to this content item section lists all the links in documents that reference this content item. Links that are invalid or broken are listed using bold font. Clicking the Info link in the Actions column displays the Link Info Page *(page* 5-53*)* for that particular link.

When the References sections are open, the Hide toggle switch option is activated. Clicking Hide closes the References sections and hides the lists of links. Refer to Hide Link References *(page* 5-51*)*.

Link Info Page



The Link Info page provides additional information about a link. The Content ID field contains an active link to the content item that contains this link. You can access this page from the Search Links Page *(page* 5-47*)* or from the Content Information page. For detailed procedures on accessing the Link Info page, refer to Checking the Link Info of Specific Links *(page* 5-56*)*.

Notification of Expiration

With Link Manager installed, the Notification of Expiration page includes additional information for each content item that is expiring soon. The e-mail notification lists one of the following statements to indicate whether the expiring content item is referenced by another content item:

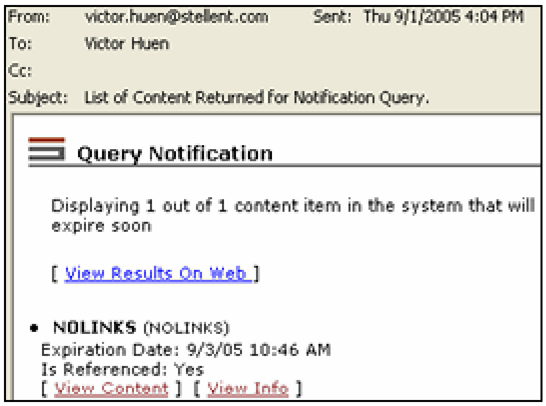
- Is Referenced: Yes
- Is Referenced: No

The email does not provide a list of the content items that reference the soon-to-expire document. This information is available in the References section on the Content Information page. For more information, refer to Checking Content Item Link References *(page* 5-55*)*.

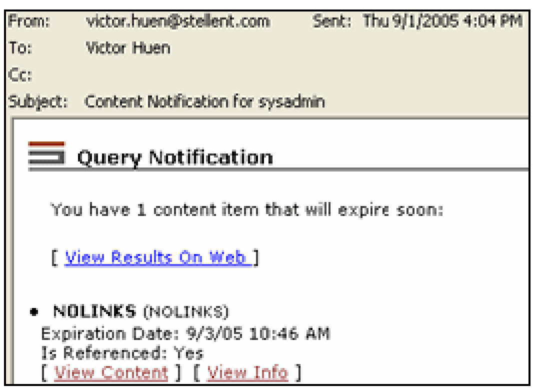
E-mail notifications for expiring content items are sent if the applicable Content Server configuration variable (EnableExpirationNotifier) has been enabled. For more information about setting this configuration variable, refer to the *Content Server Idoc Script Reference Guide*. When enabled, separate e-mail notifications are sent to the author(s) and the system administrator.

Note: When a content item expires, it still exists in the Content Server. Expiration only removes the item from the index. Therefore, all links associated with an expired content item are functional as long as they involve a valid document.

Notification of Expiration E-mail for Author



Notification of Expiration E-mail for System Administrator



Performing a Link Search

To search for links in content items:

1. Click the **Managed Links Search** link in the Content Management tray. The Search Links page is displayed.
2. Enter the applicable values in the desired field(s). For more detailed descriptions of the fields, refer to Search Links Page *(page* 5-47*)*.
3. Click **Search**. The Link Manager component generates and displays the search results as shown in the Link Search Results Page *(page* 5-49*)*.

Checking Content Item Link References

You can access the Content Information page from the Content Server's Search Results page or from the Link Manager's Search Links Page *(page* 5-47*)*.

To display, check, and verify all the link references associated with a specific content item:

From the Content Server's Search Results page

1. Search for the specific content item using the Content Server's Search page.
2. Select a content item from the Search Results page and click the corresponding **Content Info** icon in the Actions column.

   The Content Information page for the selected content item is displayed. If this content item contains links or has links that reference it, the References Show toggle switch is displayed.
3. Click the References **Show** toggle switch.

   All applicable links are displayed. The Links contained in this content item section lists all the links included in this content item that reference other documents. The Links to this content item section lists all the links in other documents that reference this content item.

From the Link Manager's Search Links page

1. Open the Search Links page and search for links. Refer to Performing a Link Search *(page* 5-55*)*.
2. Select a link from the Search Results section.
3. Click the **Content Info** icon in the Actions column.

   The Content Information page for the selected content item is displayed. If this content item contains links or has links that reference it, the References Show toggle switch is displayed.
4. Click the References **Show** toggle switch.

   All applicable links are displayed. The Links contained in this content item section lists all the links included in this content item that reference other documents. The Links to this content item section lists all the links in other documents that reference this content item.

Note: To display the Link Info Page *(page* 5-53*)* for any link listed in the References sections (either Links contained in this content item or Links to this content item), click the corresponding Info link in the Actions column.

Checking the Link Info of Specific Links

You can access the Link Info Page *(page* 5-53*)* for any link from either the Content Information page or from the Search Links Page *(page* 5-47*)*.

To view additional information about a specific link:

From the Content Server's Content Information page

1. Open the Content Information page for a specific content item and display the applicable links. Refer to Checking Content Item Link References *(page* 5-55*)*.
2. Select a link from one of the lists in the References sections (either Links contained in this content item or Links to this content item).
3. Click the corresponding **Info** link in the Actions column.

   The Link Info page for the selected link is displayed.

From the Link Manager's Search Links page

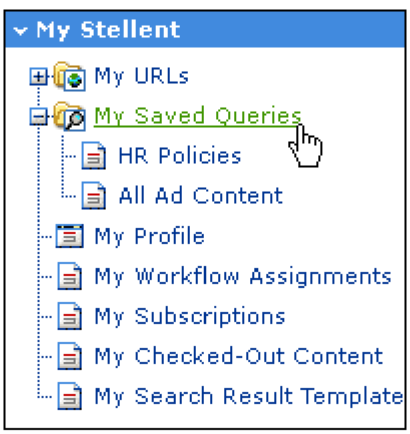
1. Open the Search Links page and search for links. Refer to Performing a Link Search *(page* 5-55*)*.
2. Select a link from the Search Results section.
3. Click the **Actions** icon in the Actions column. The Item Actions Pop-up Menu *(page* 5-49*)* is displayed.
4. Select the **Link Info** menu option.

   The Link Info page for the selected link is displayed.

SAVING QUERIES

This section covers the following topics:

About Saved Queries



To quickly display search results for searches that you perform often, you can save links to those searches in the *My Saved Queries* folder under the My Content Server tray (page 4-20) in the portal navigation bar (page 4-3). Once you have saved a query link, you can modify or delete the link from your Saved Queries page (page 4-47).

Saving a Query

Use the following procedure to save a search as a query link in your portal navigation bar (page 4-3):

1. Specify the search criteria you want to save.
   - On the Search tray (page 5-30), home page search fields (page 5-29), or advanced search page (page 5-34), enter the search criteria in the desired fields.
   - On the search results page (page 5-42), the criteria saved will be the criteria that were used to display the results.
2. Select **Save Search** from the **Actions** choice list on the search results page (page 5-42).

   A prompt dialog is displayed.
3. Enter a title for the saved query. This is the link that will be displayed in your portal navigation bar (page 4-3).
4. Click **OK**.

   The new link is displayed under the My Saved Queries folder in your portal navigation bar.

Note: See Editing Saved Queries *(page* 4-14*)* for information about modifying and deleting saved queries.

Chapter

6

WORKING WITH FILES

OVERVIEW

This section covers the following topics:

UNDERSTANDING A FILE'S LIFE CYCLE

This section covers the following topics:

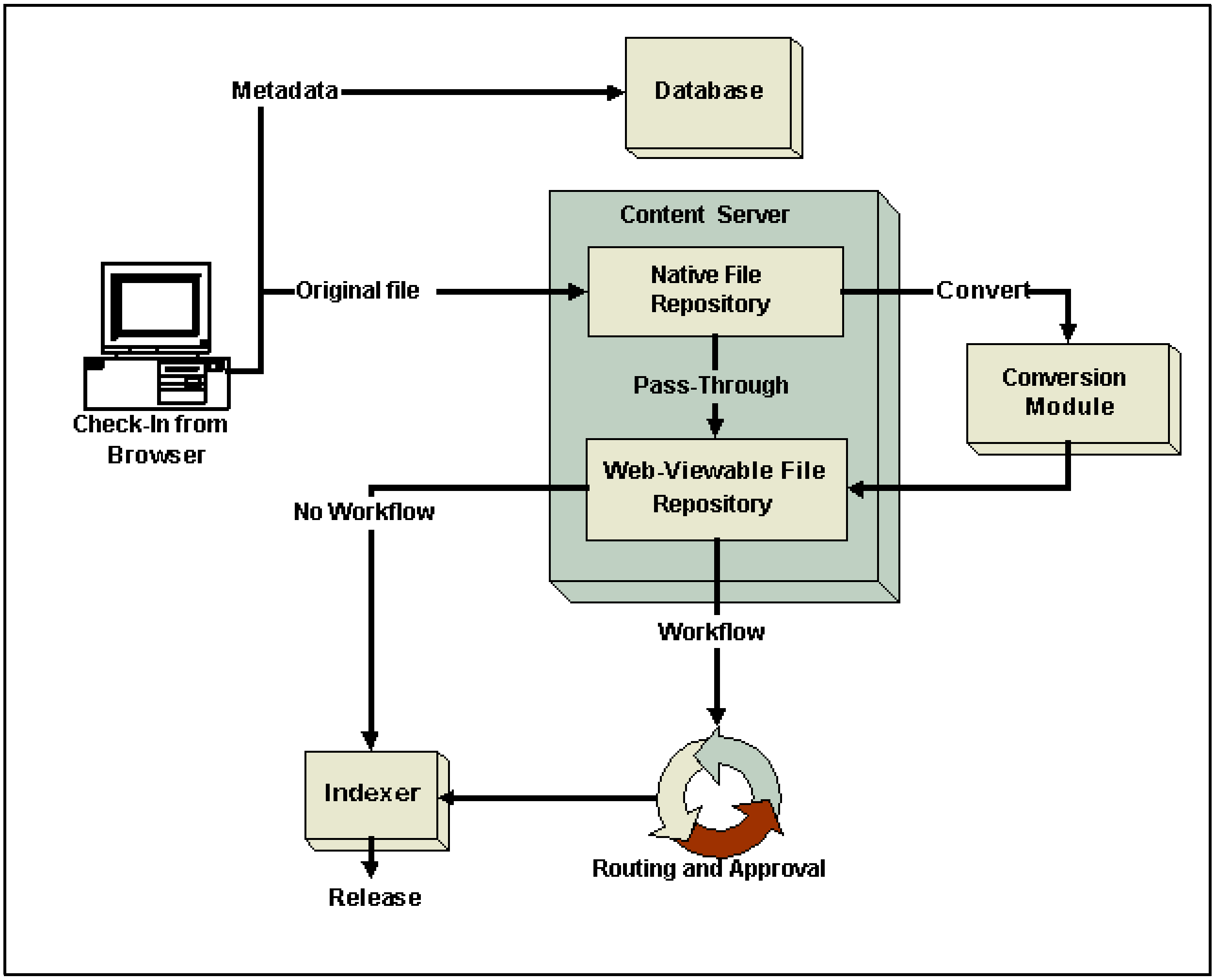
Revision Life Cycle

This section describes the process that a file goes through to become a content item revision in Content Server. The same process occurs when you check in a new file and when you check in a revision to an existing content item.

Note: See Revision Status (page 6-4) for information on the status of a file at each step in the process.

1. The contributor logs in to Content Server through a web browser and displays a check-in window. This user will typically be the author of the content item.
2. The author specifies the file name, enters information about the file (metadata), and designates security information (security group and account, if enabled).
3. Upon check-in, a copy of the native file goes into the native file repository, and the file's metadata is saved to the content information database.
4. If a conversion product is set up for the specified file format, the file is converted to a web-viewable format (for example, PDF). If the file cannot be converted, it is "passed through" as is (i.e., unconverted).
5. If the file was converted, the converted file is stored in the web-viewable file repository. If the file was passed through in unconverted form, a copy of the native file is stored in the web-viewable file repository.
6. If the file's metadata meets the criteria for an enabled workflow, it goes through the workflow process.
7. When the file meets all of the following criteria, the file contents or its metadata only are indexed in the web-viewable file repository:
   - Successful conversion or pass through
   - Approval at all steps of a workflow (if any)
   - Release date is reached
8. On the content item's release date, the file becomes available in the content server.
   - The content item can be found by browsing through the defined hierarchical link structure (the "Library"), or by searching for metadata or specific text.
   - When users view the content item, they can retrieve the web-viewable file, the native file, and/or the metadata.

Figure 6-1 Revision Life Cycle



See Also

– *Revision Status (page 6-4)*

– *Work In Progress Page (page 6-5)*

– *Determining the Revision Status (page 6-4)*

Revision Status

A content item revision goes through several statuses within its life cycle:

Status	Description
GenWWW	The file is being converted to web-viewable format or is being indexed, or has failed conversion or indexing.
Done	The file is waiting to be released on its specified release date.
Released	The revision is available in the content server.
Review	The revision is in a workflow and is being reviewed.
Edit	The revision is at the initial contribution step of a workflow.
Pending	The revision is in a basic workflow and is waiting for approval of all revisions in the workflow.
Expired	The revision is no longer available for viewing in the content server. (The revision was not deleted, but it can be accessed only by an administrator.)
Deleted	The revision has been deleted and is waiting to be completely removed from the content server during the next indexing cycle.

See Also

– *Revision Life Cycle (page 6-2)*

– *Work In Progress Page (page 6-5)*

– *Determining the Revision Status (page 6-4)*

Determining the Revision Status

Use the following procedure to determine the status of a content item:

1. Click the **Content Management** tray in the portal navigation bar (page 4-3).

2. Click **Work In Progress**.

   The Work in Progress page is displayed (page 6-5).

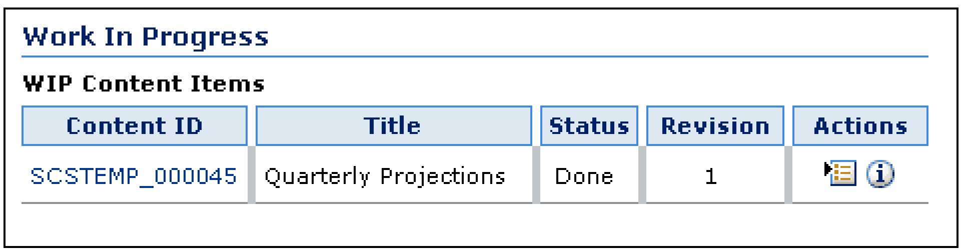
3. If the content item you are looking for is listed, the status is shown next to the content ID.

4. If the content item you are looking for is not listed, it could be released (i.e., have the Released status) or it could be in a workflow. Display the content information page for the content item (page 6-7). The revision status is shown in the Status field.

See Also

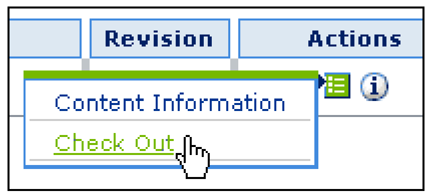
– *Revision Status (page 6-4)*

Work In Progress Page



The Work In Progress page displays content items that are in the GenWWW or Done status. To access this page, click the **Work In Progress** on the Content Management tray (page 4-6).

Feature	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item. Clicking the Content ID link displays the web-viewable file.
Status column	Displays the revision status of the content item.
Revision Column	Displays the revision number of the content item.

Feature	Description
Action icon ( )	Displays a contextual menu allowing you to check out the content item, or display the content information page for the content item (page 6-7). **Figure 6-2** Item Action Menu 
Info icon ( )	Displays the content information page for the content item (page 6-7).

See Also

– *Revision Status (page 6-4)*

– *Determining the Revision Status (page 6-4)*

VIEWING CONTENT INFORMATION

This section covers the following topics:

❖ Content Information Page (page 6-7)

❖ Accessing Content Information (page 6-6)

Accessing Content Information

Use any of the following procedures to view the content information page for a content item (page 6-7):

❖ From the search results page (page 5-42), click the **Info icon** ( ) to view the Content Information page for that file.

❖ From the search results page (page 5-42), click the **Action icon** ( ) to open a contextual menu and choose Content Information.

❖ From the check-in confirmation page (page 7-20), click the **Content Info** link to view the content information page for the file you just checked in.

Content Information Page

The content information page is used to view metadata and other information about a specific content item. For example, you can use this page to determine when a file was released or to see the content item’s revision history. For more information on accessing the content information page, refer to Accessing Content Information (page 6-6).

Note: A content profile may affect what content information is initially displayed on the Content Information page. If content meets a content profile defined by a system administrator, then only information meeting the profile criteria is displayed. If you are an administrator, an additional link for accessing the full content information is displayed in the page heading.

Feature	Description
Full link	Displays the full content information page. **Note:** This link is displayed only if a content item meets criteria defined by the system administrator in a content profile rule and if you have administrator privileges. If this link is displayed, more content information is available than is shown.
Content ID field	The unique identifier for the content item. **Note:** If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Revision field	The revision number of this revision.
Type field	The category of the document.
Title field	The descriptive name for the content item.
Author link	The user who checked in this revision. Clicking the link opens your e-mail program with a new message addressed to this user.
Comments field	Additional notes about the content item.
Security Group field	An identifier that specifies access permission to the content item.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Checked Out By field	The user who has the content item checked out.
Status field	The revision status indicating where the file is in its life cycle. For details refer to Revision Status (page 6-4).
Formats field	The file format of the native file.

Feature	Description
Web Location link	The unique web address for the web-viewable file. Clicking the link displays the web-viewable file.
Native File link	The file name of the native file. Clicking the link enables you to open or save a copy of the native file.
Discussion	Allows for the addition of a post to an associated threaded discussion of a content item. Associated discussions are stored as content items in Content Server, and identified by appending a *_d* to the end of the content ID of the item to which the discussion is associated. For example, an item with content ID *001* would have an associated discussion with content ID *001_d*. **Create Discussion**—Creates a new discussion item in Content Server, associated with the content item. **<content_id>_d (*x* item)**—Opens an existing discussion associated with the content item so that a new post may be added. The number of posts is listed next to the discussion ID in parenthesis. For example, *001_d (4 items)* means that four posts have been made in the discussion associated with content ID 001.

Feature	Description
Action Menus	**Change View:** Performs the selected action: **Check Out**—Checks out the content item and displays the check-out confirmation page (page 8-11). This option is displayed only if the content item is not checked out. **Undo Check Out**—Cancels the content item check-out. This option is displayed only if the content item is checked out. You can undo check-out only on content items you checked out, or you must have Admin permission for the content item. **Update**—Displays the Info Update Form (page 6-14), which enables you to change the content item's metadata. **Check In Similar**—Displays the content check-in form (page 7-7) with the current content item's metadata already filled in. **Subscribe**—Displays the Subscriptions page (page 6-31), which enables you to be notified of new revisions to the content item. This button is displayed if you have not subscribed to the content item. **Unsubscribe**—Cancels your subscription to the content item. This option is displayed if you have subscribed to the content item and no criteria subscriptions are enabled on your system. For details refer to About Subscriptions (page 6-29). **Subscriptions**—Displays the Subscriptions page (page 6-31). This option is displayed if you have subscribed to the content item and criteria subscriptions are enabled on your system. For details refer to About Subscriptions (page 6-29). **E-Mail:** Performs the selected action **Send link by e-mail**—Opens your e-mail program with a new message that contains a link to the URL (web address) of the web-viewable file.

Feature	Description
Revision History section	Shows the complete revision history of the content item. For details refer to Revision History (page 6-12).

WORKING WITH FILE REVISIONS

This section covers the following topics:

About Revisions

Each time that you check out a file and check it back in, Content Server creates a new revision of that file. The new revision has the same content ID as the previous revision, but the native file and the metadata can be the same or different. The system stores the previous versions of a file, so you can review them as necessary.

Viewing the Revision History

Use either of the following procedures to view the revision history for a content item:

- From the content information page for a content item (page 6-7), scroll to the bottom of the page to view the revision history (page 6-12).
- From the search results page (page 5-42), click the Rev link for the revision to view revision history (page 6-12).

Deleting Revisions

Use the following procedure to delete a revision from the content server:

Note: You must have delete permission for the content item to delete a revision.

1. Display the content information page for the content item (page 6-7).
2. In the Revision History section, click the **Delete** button for the revision you want to delete.

   You are asked to confirm the deletion.
3. Click **OK** to delete the revision.

The revision is unavailable in the content server immediately, and will be permanently deleted from the system during the next indexing cycle.

Revision History

Revision History

Revision	Release Date	Expiration Date	Status	Actions
[4]	5/21/04 12:27 PM	None	Released	Delete
3	5/21/04 11:11 AM	None	Released	Delete
2	5/17/04 3:44 PM	None	Released	Delete
1	5/14/04 11:31 AM	None	Released	Delete

The Revision History section of the content information page (page 6-7) is used to view and delete revisions of a content item.

Feature	Description
Revision column	Clicking a revision number displays the content information page for that revision (page 6-7):
Release Date column	The date and time the revision was released.
Expiration Date column	The date and time the revision will no longer be available for searching or viewing in the content server, if any.
Status column	The revision status indicating where the file is in its life cycle. For details refer to Revision Status (page 6-4).
Actions column	Clicking the Delete option removes the revision from the content server. You must have delete permission for the content item to delete a revision.

UPDATING METADATA

This section covers the following topics:

About Updating Metadata

There are two ways to change the metadata of an existing content item:

- Change the metadata while checking in a revision to the file. For details refer to Checking In a Revised File (page 7-5).
- Update the metadata without creating a new content item revision. For details refer to Updating Metadata (page 6-13).

Updating Metadata

Use the following procedure to update content item metadata:

1. Display the content information page for the revision you want to update (page 6-7).
2. Select **Update** from the **Actions** drop-down list.

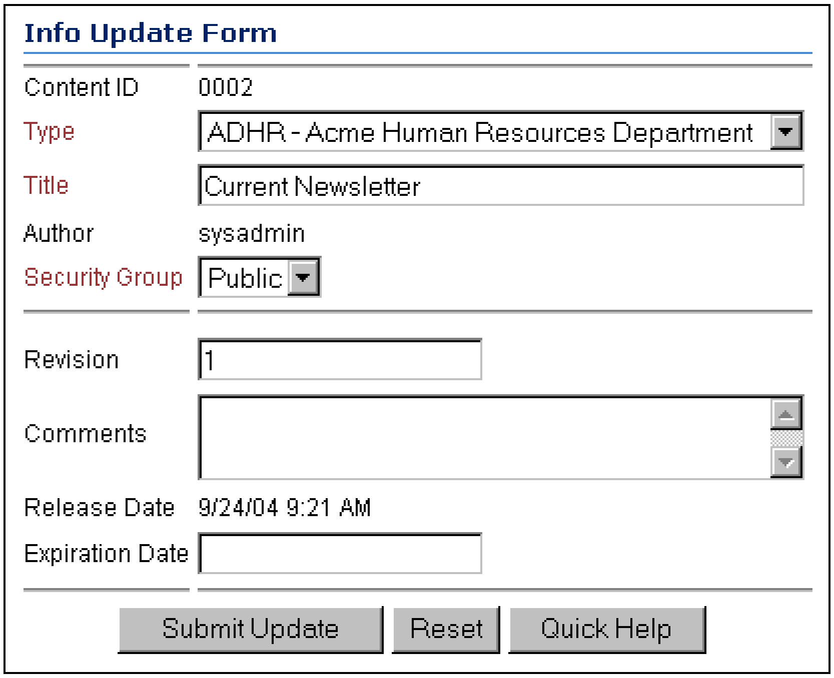
   The Info Update Form (page 6-14) is displayed.
3. Change the metadata fields as necessary.

Note: You cannot change the content ID or the release date. You can change the author only if you have Admin permission for the content item.

4. Click **Submit Update**.

Note: The **Reset** button returns the fields to their original values.

Info Update Form



The Info Update Form is used to change a content item's metadata without creating a new revision. To access this page, select **Update** from the Actions drop-down list on the content information page for a content item (page 6-7).

Feature	Definition
Content ID field*	The unique identifier for the content item. This value cannot be changed. **Note:** If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Type field*	The category of the file. You must select from a list of predefined values.
Title field*	A descriptive name identifying the revision. The maximum length is 80 characters.

Feature	Definition
Author field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.
Security Group field*	An identifier that specifies access permission to the content item. You can select from the list of predefined values.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Revision field	The revision number.
Comments field	Additional notes about the content item. The maximum length is 255 characters.
Release Date field	The date that the current revision was released to the content server. This value cannot be changed.
Expiration Date field	The date and time that the revision will no longer be available for searching or viewing in the content server. • Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. • If a value is entered, the date is required; the time is optional.
Submit Update button	Saves the specified metadata.
Reset button	Resets all metadata fields to their original values.

* Required metadata fields

VIEWING A FILE

This section covers the following topics:

About Viewing a File

After you find a file, you can view it in several ways, depending on the original file format, the conversion setup for your system, and the configuration of your web browser. You may be able to view a web-viewable HTML rendition of the file in the web browser, with a helper application, with a plug-in, or in its native application. Depending on your access permissions, you may also be able to open or get a copy of the native file.

Viewing a Web-Viewable File

To view the web-viewable rendition of a file, you must have the appropriate helper application or web browser plug-in installed. For example, to view the PDF version of a file, you must have the Adobe Acrobat plug-in. For details refer to Setting Up Helper Applications and Plug-ins (page 3-5).

You can view a web-viewable file using one of the following methods:

- ❖ From a content information page (page 6-7), click the **Web Location** link.
- ❖ From a search results page (page 5-42), click the Content ID link in the ID column (Headline view) or Description column (Classic View), or the thumbnail (Classic and Thumbnail views).

If a web-viewable file does not exist, or you do not have the correct helper application or plug-in installed, you will be prompted to either save the file or open it in its native application. For details refer to Viewing a Native File (page 6-17).

Viewing a Native File

When you view the native file of a content item, you are prompted to either save a copy of the file or open it in its native application. If you choose to open the file, you are actually opening a copy of the native file that is stored in a temporary location on your hard drive; you are not opening the native file that is stored in the content server repository.

You can access a native file using one of the following methods:

- From a content information page (page 6-7), click the **Get Native File** link.
- From a check-out confirmation page (page 8-11), click the **Native File Link**.
- From a workflow review notification (page 9-5), click the **Native File** link.

DISCUSSING CONTENT

Content Server comes bundled with the ThreadedDiscussions component. If enabled, it allows contributors to create a discussion associated with a content item, where you can post questions and comments about the content item throughout multiple revisions. This component must be installed and enabled by your system administer for this functionality to be available.

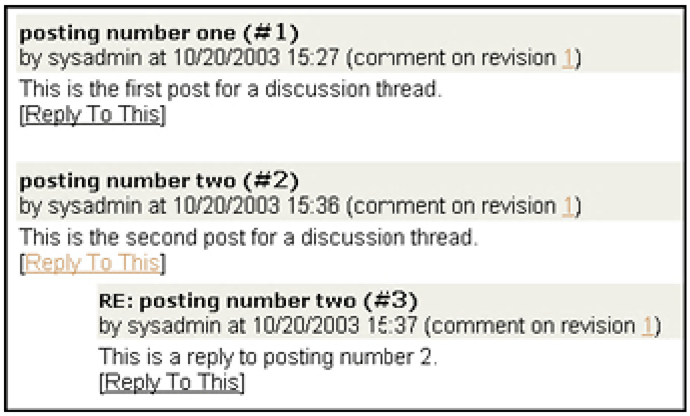
This section covers the following topics:

About Discussion Posts and Threads

Threaded discussions enable users to track thoughts, record how and why changes were made to content, and make notes when content is in a workflow. Because threaded discussion posts follow content through multiple revisions and refer to the revision for which the comment was made, threaded discussions can be used to help contributors keep track of enhancement requests or other recommendations for future changes to the content. 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 item.

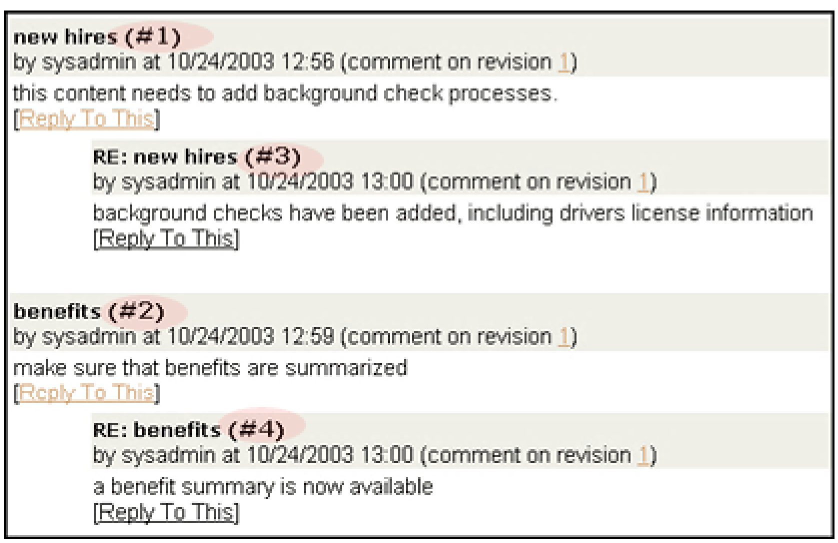
Unlike other content items in the content server, edits to a discussion do not create new revisions of the discussion content itself. Instead, the .hscp form that contains the discussion is modified. When you begin a discussion thread about a content item, an .hscp form for the discussion is created, given the same ID as the content with *_d* appended to the end, associated with the content item, and automatically checked into Content Server behind the scenes. The Revision History for discussion content is always Revision [1]. The revision number does not increment for discussion content.

Figure 6-3 Threads and Posts



In Figure 6-3, each top level post represents a thread. Posting number one (#1) and posting number two (#2) are threads. The reply (#3) to thread number two represents a post within a thread.

Figure 6-4 Posting Order



The number of the post represents the chronological order in which the comments were posted. Figure 6-4 shows posts #1, #2, #3 and #4. The reply to “new hires post #1”, “RE: new hires #3,” was made after the “benefits post #2.”

Initiating a Discussion from the Content Information Page

To initiate a discussion from the content information page of a content item you are checking in, perform the following steps:

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.

Initiating a Discussion from the Search Results Page

You must be using a search results view that provides access to the Actions list, such as the Headline or Thumbnail views. If you are using the thumbnail view, then you can click the discussion icon to access the discussion.

To initiate or enter a discussion in progress from the Search Results page, perform the following steps:

1. From the main menu, click **Search**. The Advanced Search page is displayed.
2. Enter any search metadata fields to narrow your search, and click **Search**. For example, selecting *Discussion Type=Not applicable*, prevents your search results from displaying content items that are discussions. 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.

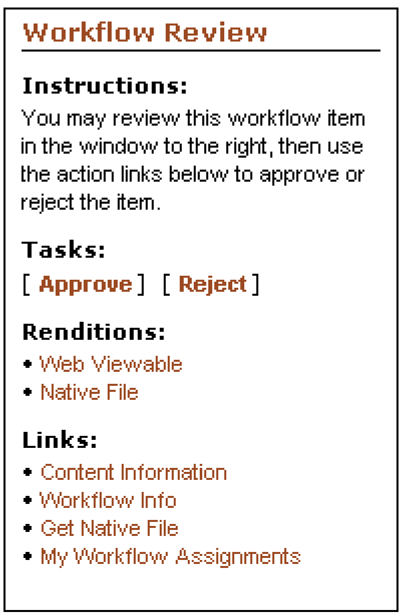
Initiating a Discussion from the Workflow Review Page

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 6-5 The 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

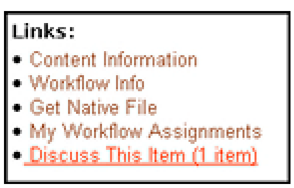
Users with read permissions can view the messages within a threaded discussion, but only those who can edit the content can post messages.You can access an existing discussion from the following links:

- ❖ 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

Figure 6-6 Discussion Links Area of the Content Information Page

The Discussion link indicates how many discussion posts have been created for the document. Figure 6-6 shows that content ID “tt02_d” has 5 items in the discussion thread. The number of items is generated by the Discussion Count custom information field.

Figure 6-7 Discussion Links Area of the Workflow Review Page



To view a discussion thread, perform the following steps:

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, perform the following steps:

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. Click the **[Print View]** option. The discussion is displayed in a print view in another browser window.
5. Click the Printer icon.

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 Content Server.

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.

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.

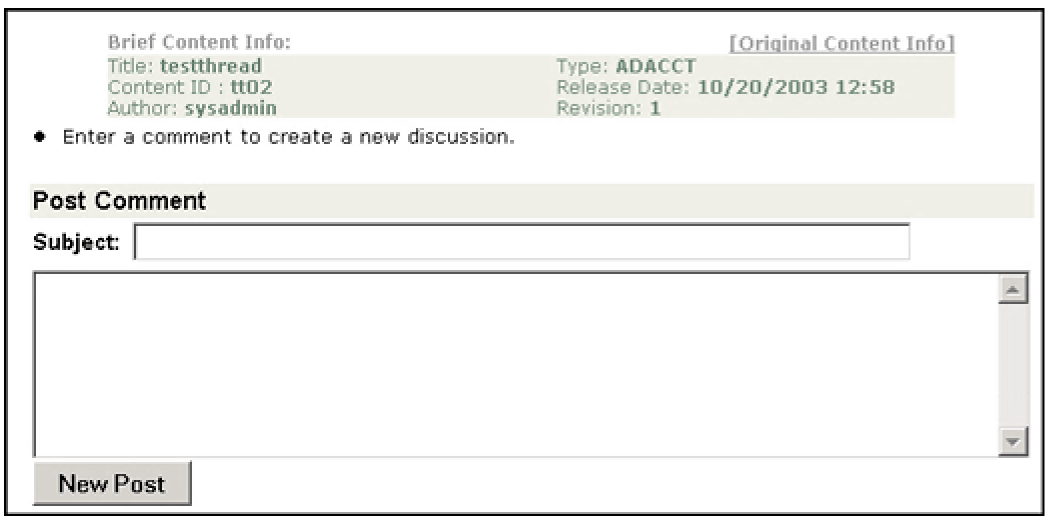
Searching for Content that is not a Discussion

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.

Post Comment Form

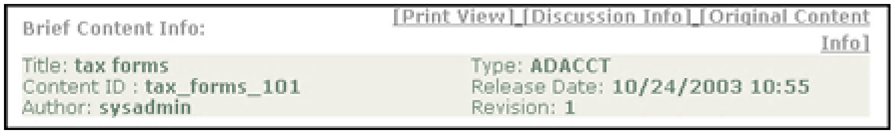


Use this form to post a comment on a content item, or to post a reply on content that already has a discussion initiated. The Post Comment Form can be accessed from numerous popup menus and links. You can initiate a discussion with this form from the following links:

- the Create Discussion link 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 (Applicable to Headline and Thumbnail Views only. The Create Discussion popup menu is not available on the Classic View).

Note: Remember, the bundled ThreadedDiscussions component must be installed and enabled by your system administer for this functionality to be available.

Discussion Form Menu

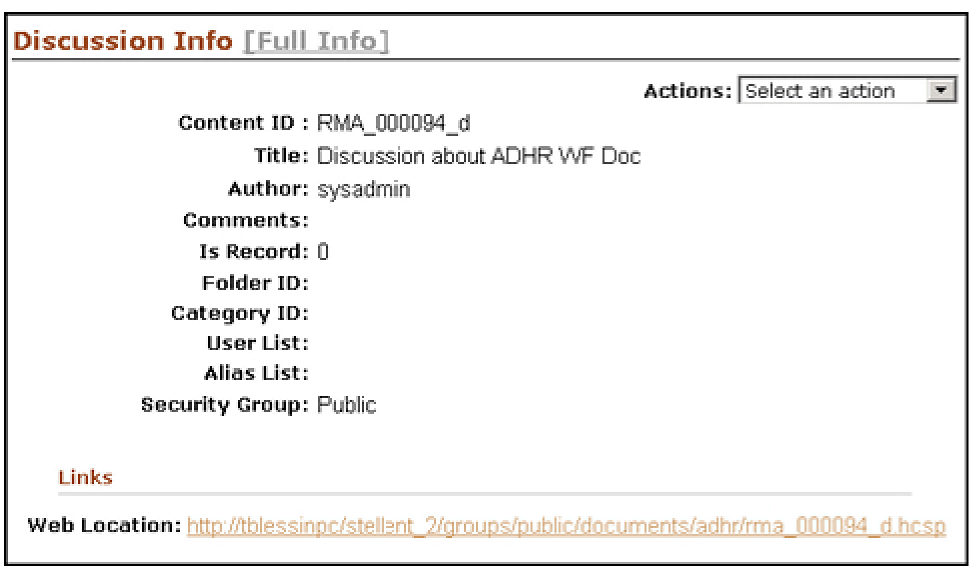


A new discussion form has the Original Content Info menu link only. Once a discussion has been initiated, the Print View and Discussion Info menu links become available.

The following table describes the menu options:

Menu Option	Description
[Print View]	Opens a print view of the discussion that you can elect to print. A “printed by user” message is printed at the top of the discussion page for you.
[Discussion Info]	Opens the Discussion Info Page for discussion content.
[Original Content Info]	Opens the Content Information page for the discussion content.

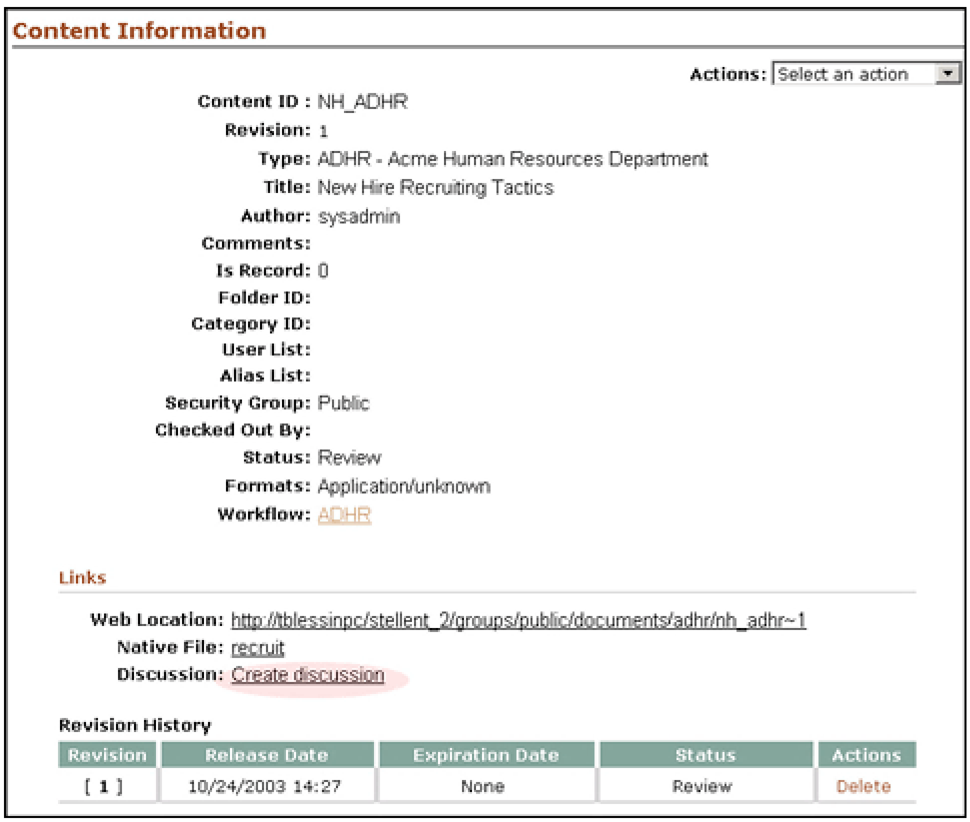
Discussion Info Page



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. From this page, you can access the Content Information page by clicking the **[Full Info]** link.

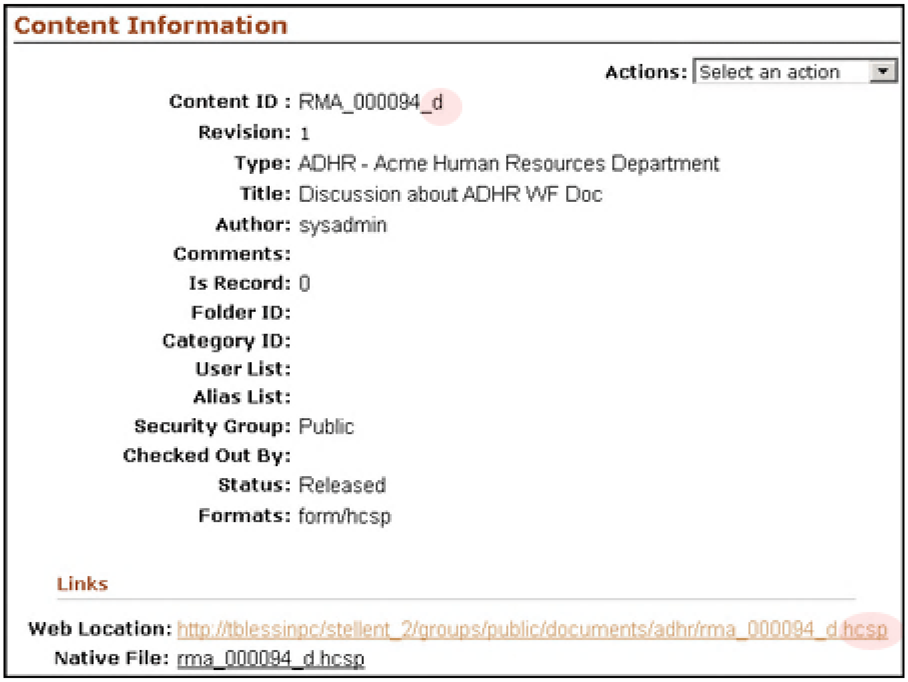
You can access the Post Comment Form for the discussion thread by clicking the **Web Location** link, which accesses the Threaded Discussion (hcsp) form.

Content Information Page



The Content Information Page contains the additional Discussion field when the ThreadedDiscussions component is installed and enabled. The Content Information Page for content that is a discussion itself does not contain the Discussion link, since it is the discussion.

Figure 6-8 Content Information Page for discussion content



SUBSCRIBING TO NEW REVISIONS OF A CONTENT ITEM

This section covers the following topics:

About Subscriptions

Subscriptions enable you to be notified automatically whenever a content item is revised. There are two types of subscriptions:

- **File subscription—**Users manually subscribe to individual content items.
- **Criteria subscription—**The system administrator sets up a subscription based on one or more metadata fields. When a user subscribes to the Criteria subscription, they are automatically subscribed to all content items that match a particular value of those metadata fields.

  For example, the system administrator sets up a criteria subscription with *Author* as the criteria. Whenever you view a content information page (page 6-7), you can choose to subscribe to all content items checked in by the author of the current content item.

The system administrator can subscribe users to specific content items or to criteria subscriptions, but users have the ability to cancel these subscriptions.

Subscribing to a Content Item

Use the following procedure to subscribe to a content item:

1. Display the content information page (page 6-7) for the content item that you want to subscribe to.
2. Select **Subscribe** from the **Actions** drop-down list.
   If the item is part of a criteria group, the Subscribe to “Item” page is displayed (page 6-35).
3. Click **Subscribe** under the Subscribe To This Item section.
4. If no e-mail address has been specified in your user profile (page 4-15), you are prompted to enter an e-mail address for this subscription. Enter an e-mail address and click **OK**.

Subscribing to a Criteria Group

Use the following procedure to subscribe to a criteria group:

1. Display the content information page (page 6-7) for the content item that you want to subscribe to, or for a content item that has the same metadata as a group of content items you want to subscribe to.
2. Select **Subscribe** from the **Actions** drop-down list.

   The Subscribe to “Item” page is displayed (page 6-35).
3. Select **Subscribe** from the Action contextual menu () corresponding to the group of content items to which you want to subscribe.
4. If no e-mail address has been specified in your user profile (page 4-15), you are prompted to enter an e-mail address for this subscription. Enter an e-mail address and click **OK**.

Viewing Your Current Subscriptions

Use the following procedure to view your current subscriptions:

1. Open the My Content Server tray (page 4-20) and select **My Subscriptions**.

   The Subscriptions page (page 6-31) is displayed, listing all of your current subscriptions.

Unsubscribing from a Content Item

Use the following procedure to unsubscribe from a file:

1. Open the My Content Server tray (page 4-20) and select **My Subscriptions**.

   The Subscriptions page (page 6-31) is displayed, listing all of your current subscriptions.

2. Select **Unsubscribe** from the Actions contextual menu ( ) under **Subscription Items**.

Unsubscribing from a Criteria Group

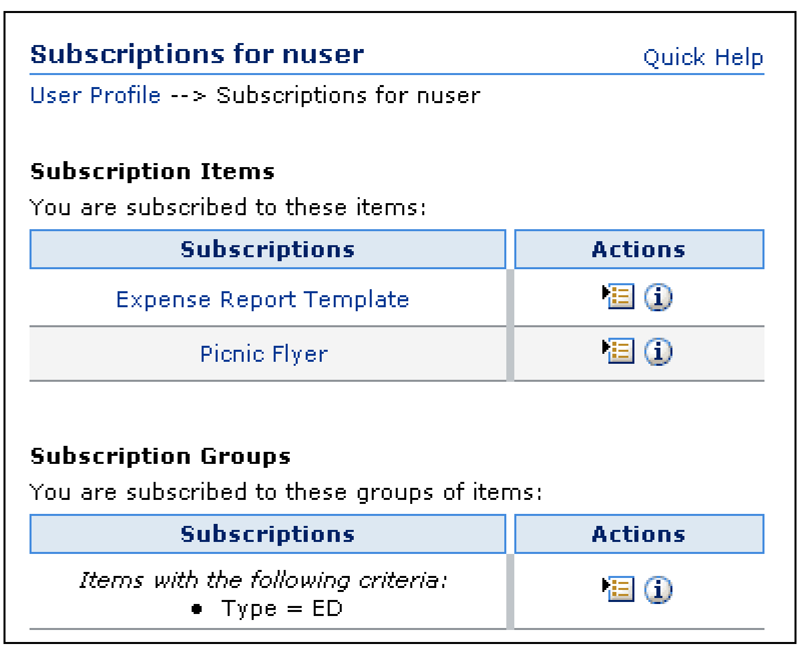
Use the following procedure to unsubscribe from a file:

1. Open the My Content Server tray (page 4-20) and select **My Subscriptions**.

   The Subscriptions page (page 6-31) is displayed, listing all of your current subscriptions.

2. Select **Unsubscribe** from the Actions contextual menu ( ) under **Subscription Groups**.

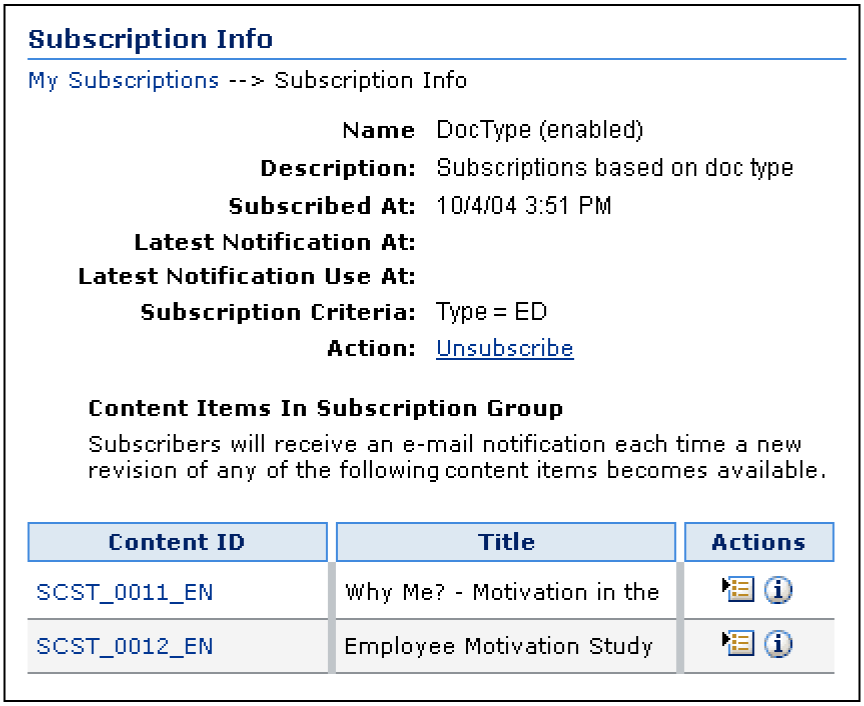
Subscriptions Page



The Subscriptions page is used to view your current subscriptions. To access this page, click **My Subscriptions** under the My Content Server tray (page 4-20), or click **Subscriptions for *[User]*** on the user profile (page 4-15).

Field	Description
Breadcrumbs	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a breadcrumb link displays the page named by the link.
Subscription Items: lists all file subscriptions.	
Subscriptions column	Displays the title of the content item. Clicking the title link displays the web-viewable file.
Actions column	❖ **Actions icon ( ):** • **Content Information link:** Displays the content information page (page 6-7). • **Unsubscribe link:** Cancels your subscription to the content item. This link is displayed only if you are already subscribed. ❖ **Info icon ( ):** Display the content information page (page 6-7).
Subscription Groups: lists all criteria subscriptions.	
Subscriptions column	Displays the subscription criteria for the content group.
Actions column	❖ **Actions icon ( ):** • **Subscription Info link:** Displays the Subscriptions Info page (page 6-33). • **Unsubscribe link:** Cancels your subscription to the subscription group. ❖ **Info icon ( ):** Displays the Subscriptions Info page (page 6-33).

Subscription Info Page



The Subscription Info page is used to identify when you were subscribed to a file or group of files and when you were last notified about a new revision. To access this page, select **Subscription Info** from the Actions contextual menu ( ), or click the **Info** icon ( ).

Field	Description
Breadcrumb links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a breadcrumb link displays the page named by the link.
Name field	The name of the subscription.
Description field	The description assigned by the system administrator.
Subscribed At field	The date and time that you subscribed to the file or your system administrator subscribed you to the file.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Latest Notification At field</td><td>The most recent date and time that you were sent an e-mail notification from this subscription.</td></tr>
<tr><td>Latest Notification Use At field</td><td>The most recent date and time that you accessed a content item from an e-mail notification from this subscription.</td></tr>
<tr><td>Subscription Criteria</td><td>Shows the criteria for the subscription.</td></tr>
<tr><td>Action field</td><td>Clicking Unsubscribe cancels your subscription.</td></tr>
<tr><td colspan="2">Content Items in Subscription Group: lists all items in the subscription.</td></tr>
<tr><td>Content ID column</td><td>Shows the content IDs of the content items included in the subscription. Clicking a Content ID link displays the web-viewable file.</td></tr>
<tr><td>Title</td><td>Shows the titles of the content item included in the subscription.</td></tr>
<tr><td>Actions column</td><td>❖ Actions icon ( ):
• Content Information: Displays the content information page for the item (page 6-7).
• Check In: (Seen if content is checked out by user.) Displays the content check-in form (page 7-7).
• Check Out: (Seen if content is not checked out.) Checks out the item and displays the check-out confirmation page (page 8-11).
• Check In Similar: Displays the content check-in form (page 7-7) with the metadata fields filled in with information similar to this item.
• Send link by e-mail: Opens a new e-mail with links to the content item’s web-viewable and native files, as well as the content information page for the item (page 6-7).
❖ Info icon ( ): Displays the content information page for the item (page 6-7).</td></tr>
</table>

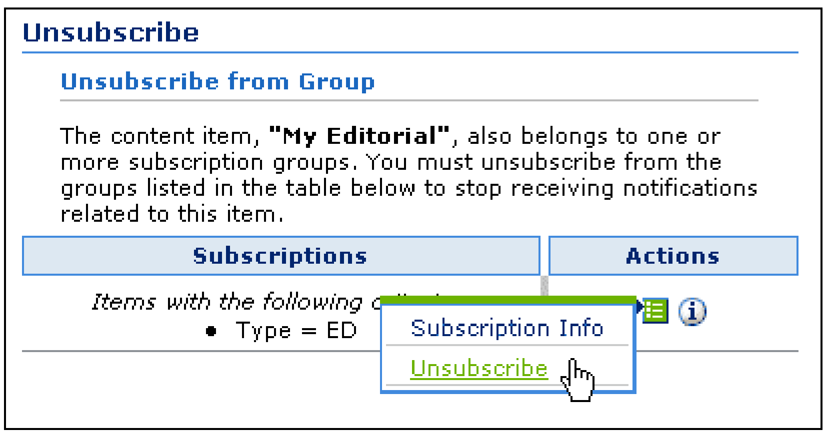
Subscribe To *"Item"* Page

The Subscribe To "*item*" page is used to specify whether you want a file subscription or a criteria subscription. To access this page, select **Subscribe** from the Actions drop-down menu on the content information page for the item (page 6-7).

Feature	Description
Subscribe to This Item: information regarding the content item.	
Subscribe link	Subscribes to the content item and not the group.
Subscribe to Related Groups: information regarding the criteria group in which the item is included.	
Subscriptions column	Lists the criteria of the group to which the item belongs.

Feature	Description
Actions column	❖ **Actions icon ( ):** • **Subscription Info:** Displays the Subscriptions Info page (page 6-33). • **Subscribe:** Subscribes to the specified criteria group. ❖ **Info icon ( ):** Displays the Subscriptions Info page (page 6-33).

Unsubscribe Page



The Unsubscribe page is used to cancel the subscription to a content item or group. To access this page, select **Unsubscribe** from the Actions drop-down menu on the content information page for the item (page 6-7).

Feature	Description
Subscriptions column	Lists the criteria of the group to which the item belongs.

Feature	Description
Actions column	❖ **Actions icon ( ):** • **Subscription Info:** Displays the Subscriptions Info page (page 6-33). • **Unsubscribe:** Unsubscribes from the specified criteria group. ❖ **Info icon ( ):** Displays the Subscriptions Info page (page 6-33).

Chapter

7

CHECKING IN FILES

OVERVIEW

This section covers the following topics:

ABOUT FILE CHECK-IN

Check-in is the process of submitting a file to the content server repository. You must have the correct permission to check a file into the content server. This permission is associated with your user name and password, which the system administrator assigns. During the check-in process, you will specify metadata for your file so that the content item can be found by drilling down or by searching.

Important: It is extremely important to know your organization's standards before you enter the metadata. The metadata helps users find the content item and determines where the file is stored in the content server.

You can check in content items as:

- A new file (page 7-3)
- A new file similar to an existing content item (page 7-5)
- A revised file (page 7-5)
- Multiple files (page 7-11)

PRIMARY AND ALTERNATE FILES

When you check in a file, the native file is called the *primary* file. You have the option to also specify an *alternate* file, which is typically one of the following:

- **A web-viewable version of the native file.** This is typically used when the native file cannot be converted by the content server, or you want to convert the native file manually.
- **A file in a format that can be converted to a web-viewable file.** This is typically used when the native file cannot be converted by the content server, and you have an alternate file format that can be converted by the system (such as PostScript).
- **A file explaining what the native file contains.** Typical uses include providing a text file that describes the contents of a compressed file (such as a zip file) and supplying documentation for an executable file.

For example, if you are checking in a Word document that has several graphics, you could compress the Word file and all the original graphics into a zip file and then check in that zip file as the primary file. As the alternate file, you could specify the Word document itself (which could be converted to PDF by the Content Server), a text file that describes the contents of the zip file, or a PDF file that you created manually.

Note: The file extension of the alternate file (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*).

CHECKING IN SINGLE FILES

This section covers the following topics:

- Checking In a New File (page 7-3)
- Checking In a Similar File (page 7-5)
- Checking In a Revised File (page 7-5)

See Also

– *Understanding a File's Life Cycle (page 6-1)*

– *About File Check-In (page 7-1)*

– *Checking In Multiple Files (page 7-11)*

Checking In a New File

Use the following procedure to check in a new file:

1. Click the **Content Management** tray (page 4-6).
2. Click **New Check In**.

   The content check-in form is displayed (page 7-7).
3. If applicable, enter a unique name in the Content ID field.

Note: Content ID values are generated automatically by the content server if your system administrator has enabled this feature. However, you can override an automatically generated content ID by entering a new value.

Note: If your content server uses an Oracle database, all content IDs will be converted to uppercase letters automatically.

4. From the **Type** list, select the option that best describes the file.
5. Enter a descriptive title in the **Title** field.
6. From the **Security Group** list, select the security group for the content item. Keep in mind that this content item will be available to users who have permission to the specified security group.
7. If accounts are enabled for your system, select an option from the **Account** list, or enter a new account name. Keep in mind that this content item will be available to users who have permission to the specified account.

8. Specify a **primary file** using one of these methods:
   - Click **Browse** next to the Primary File field. Navigate to and select the native file, and then click **Open**.
   - Enter the complete path name and file name of the native file in the Primary File field (for example, *c:/My Documents/ABC Project/MyFile.doc*).

Tech Tip: You can check in a metadata placeholder without specifying a primary file by typing an invalid path into the Primary File field. For example, typing the word *placeholder* into the Primary File field creates a content item within Content Server with the specified metadata, but no indexed primary file. This can be useful for initiating workflows, or making metadata available for searching and discussion.

Note: If you are checking in a placeholder using Internet Explorer version 6.0 on the Windows XP operating system with Service Pack 2 installed, the path used in the Primary File field must be valid, but end with an invalid file. For example:

```
c:/placeholder
```

where *c:/* is a valid drive, but *placeholder* is not a valid file. If you do not specify a valid drive, an error message is displayed.

9. If the **Format** field is displayed under the Primary File field, select the conversion format for the file.
   - If the **use default** option is selected, Content Server converts the file format based on its file name extension.
   - If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
10. (Optional) Specify an **alternate file** by browsing or entering the path name and file name.
    - The alternate file must have a different file extension than the primary file.
    - The alternate file is typically in a web-viewable format or a format that can be converted to a web-viewable file, such as *.pdf*, *.txt*, *.doc*, etc.
11. If the **Format** field is displayed under the Alternate File field and you specified an alternate file, select a conversion format for the file.
    - If the **use default** option is selected, Content Server converts the file format based on its file name extension.
    - If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.

12. Accept the default revision in the **Revision** field. (You should change the revision only if there is a specific reason to do so.)
13. Enter any notes about the file in the **Comments** field.
14. Use the default release date, or enter a future release date in the **Release Date** field.
15. If you want the file to be unavailable in the content server on a particular date, enter a date in the **Expiration Date** field.
16. If applicable, fill in any of your organization's custom metadata fields.
17. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the check-in confirmation page is displayed (page 7-20).

Note: Depending on the type of file you checked in and how your system is configured, it may take a few minutes for the file to be converted and indexed before it is available through a search or by drilling down.

Checking In a Similar File

If you have a new file to check in that has similar metadata to an existing content item, you can use an existing content item as a model for the new file. The system then pre-fills metadata fields in the content check-in form with values from the "model" content item.

Use the following procedure to check in a similar file:

1. From the check-in confirmation page (page 7-20) or the content information page (page 6-7) of the existing content item, click **Check In Similar**.

   The content check-in form (page 7-7) is displayed. Most of the metadata fields will display the same values as those assigned to the existing content item.

2. Continue with step 3 of the procedure to check in a new file (page 7-3), changing or adding metadata values and member permissions as necessary.

Checking In a Revised File

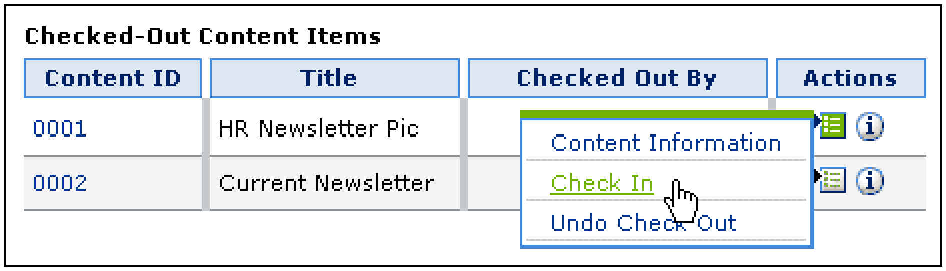
Use the following procedure to check in a revised file:

1. Click the **My Content Server** tray.
2. Click **My Checked-out Content**.

   The Checked Out Content for *[User]* page is displayed (page 8-9).

3. Click the Action icon for the appropriate content item to display a contextual menu and select **Check In**. You can now check in the revised file using the standard procedure to check in a file (page 7-3).

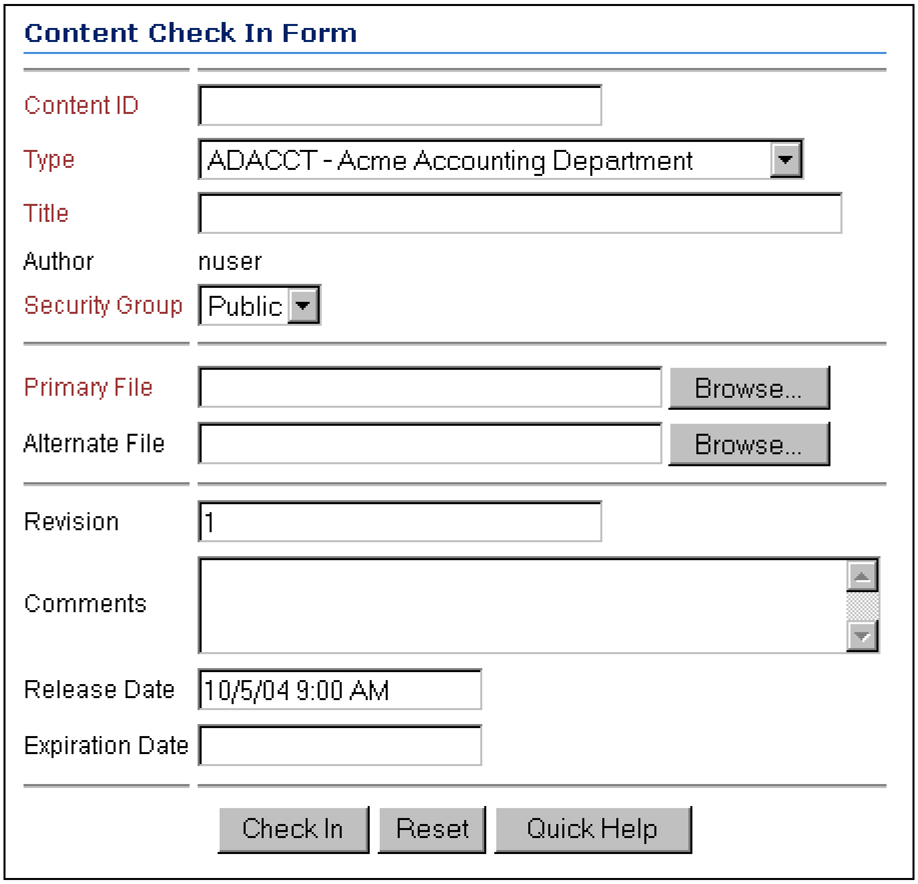
Figure 7-1 Item Action Menu



Please note the following considerations:

- ❖ The content ID that was assigned to the original file cannot be changed.
- ❖ The name of the original file is displayed for reference; however, the revised file that you are checking is not required to have the same name.
- ❖ The revision has been incremented by one.

CONTENT CHECK-IN FORM



The content check-in form is used by contributors to check files into Content Server. To access this page, click **New Check In** on the Content Management tray (page 4-6).

Tech Tip: Using a content profile link under the My Content Server Tray (page 4-20) to check in or search for content can help you define and display the most critical metadata fields necessary for those tasks. This can help you use Content Server more effectively.

<table>
<tr><th>Feature</th><th>Definition</th></tr>
<tr><td>Content ID field*</td><td>The unique identifier for the content item.
• Duplicate names are not allowed.
• Maximum length is 30 characters.
• The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ |
Note: If a content ID is already filled in or if this field is not displayed, the system is set up to generate content IDs automatically.
Note: If your content server uses an Oracle database, all content IDs are automatically converted to uppercase letters.</td></tr>
<tr><td>Type field*</td><td>The category of the file. You must select from a list of predefined values.</td></tr>
<tr><td>Title field*</td><td>A descriptive name identifying the revision. Maximum length is 80 characters.</td></tr>
<tr><td>Author field*</td><td>The user who created or revised the content item.
Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.</td></tr>
<tr><td>Security Group field*</td><td>The security group is a set of files with the same access permission.</td></tr>
<tr><td>Account field</td><td>An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.</td></tr>
</table>

Feature	Definition
Primary File field*	The path and file name of the native file being checked in. • Maximum length is 80 characters. • The maximum file extension length (after the period) is eight characters. • Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected—**Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the primary file. **Clear—**Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your user profile (page 4-15).
Format field*	The application format for the file name entered in the Primary File field. • This field appears only if it has been enabled by the system administrator. • If the **use default** option is selected, Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. • If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.

Feature	Definition
Alternate File field	The path and file name of an alternate, web-viewable file or a file that can be converted to web-viewable format. • The file extension (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*). • Maximum length is 80 characters. • The maximum file extension length (after the period) is eight characters. • Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected—**Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the alternate file. **Clear—**Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your user profile (page 4-15).
Format field	The application format for the file name entered in the Alternate File field. • This field appears only if it has been enabled by the system administrator. • If the **use default** option is selected, Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. • If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.

Feature	Definition
Revision field	The revision increments automatically with each check-in of the content item, so generally, you should not change this value.
Comments field	Additional notes about the file. • Maximum length is 255 characters.
Release Date field	The date and time that the revision is available for viewing in Content Server. • Defaults to the date and time the file is checked in. • If another date is entered, the revision remains in Done status until the specified date. For details refer to Revision Status (page 6-4). • The date is required; the time is optional.
Expiration Date field	The date and time that the content item will no longer be available for viewing in the content server. • Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. • If a value is entered, the date is required; the time is optional. **Note:** By default, all revisions of the content item will expire when the current revision expires.
Custom fields	Any custom metadata fields for your system will be displayed on this page.

* Required metadata fields.

CHECKING IN MULTIPLE FILES

This section covers the following topics:

❖ About Multiple File Check-In (page 7-12)

❖ Upload Applet Requirements (page 7-13)

See Also

– *Checking In Single Files (page 7-3)*

About Multiple File Check-In

You can check in multiple files as a compressed zip file that is stored as a single content item. Checking in multiple files is useful for a variety of situations, including:

- Publishing software, such as FrameMaker—You can check in an entire book that contains multiple chapters.
- Page layout software, such as QuarkXpress—You can check in the Quark file and all its supporting files (fonts, pictures, etc.).
- CAD software, such as Solidworks—You can check in an assembly made of several files.
- Related files—You can check in a group of related files, such as a set of JPG files for a website.

There are two ways to check in multiple files:

- Create a compressed zip file **outside** of Content Server using a compression program such as WinZip or PkZip, and then check in this zip file as a single file. For details refer to Checking In a New File (page 7-3).
- Create a compressed zip file **within** Content Server by selecting the **Upload Multiple Files** check box in the content check-in form (page 7-7). Checking in multiple files using this method is possible if all of the following conditions are true:
  - The system administrator has enabled the upload applet on the content server.
  - The **Enable upload applet** check box is selected in your user profile (page 4-15).
  - You are using a Java-enabled browser.

  For details refer to Checking in Multiple Files Using Upload (page 7-18).

Upload Applet Requirements

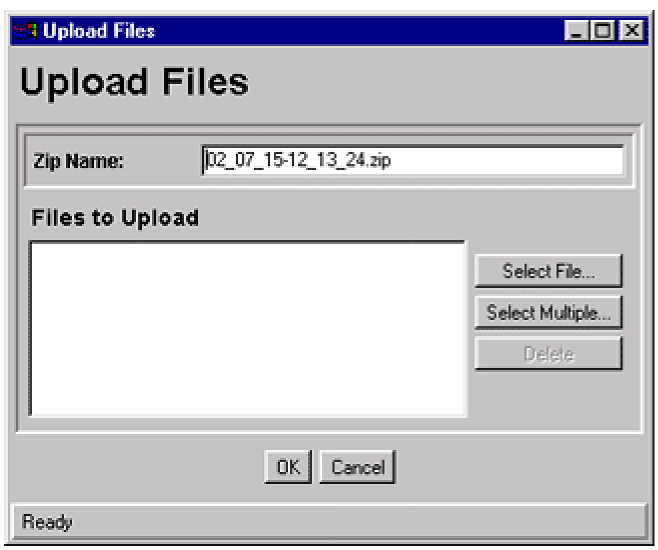
You can use the upload applet to check in multiple files only if the following conditions are all true:

- The system administrator has enabled the upload applet on the content server.
- The **Enable upload applet** check box is selected in your user profile (page 4-15).
- You are using a Java-enabled web browser.

The upload applet requires permission to access the local drive. When you access the content check-in form (page 7-7) for the first time after enabling this applet, you may see a Java security warning:

- If your system is using the Sun Java plug-in, when you encounter this message box, click **Run**. If you do not want to be prompted again with this message box, select **Always trust content from this publisher**, and then click **Run**.
- If your system is using the Microsoft plug-in for Internet Explorer, click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Oracle**, and click **Yes**.

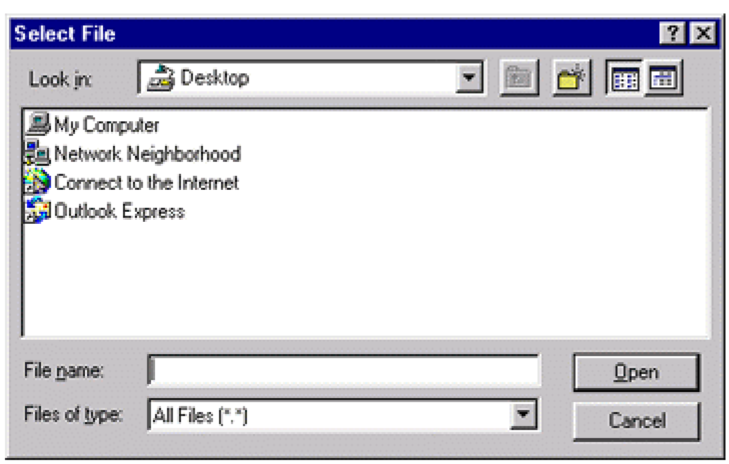
Upload Files Window



The Upload Files window is used to create a zip file as the primary or alternate file that will be checked in to the content server (see Checking in Multiple Files Using Upload on page 7-18). To access this window, select an **Upload Multiple Files** check box on the content check-in form (page 7-7), and click the corresponding **Browse** button.

Feature	Description
Zip Name field	The name of the zip file that will be checked in to the content server repository.
Files to Upload list	Lists the files that will be included in the zip file.
Select File button	Displays the Select File window (page 7-14), which is used to select individual files.
Select Multiple button	Displays the Select Files window (page 7-15), which is used to select multiple files from the same directory.
Delete button	Deletes the selected files from the Files to Upload list.
OK button	Creates a zip file and enters the file name in the Primary File field or Alternate File field.
Cancel button	Closes the Upload Files window without creating a zip file.

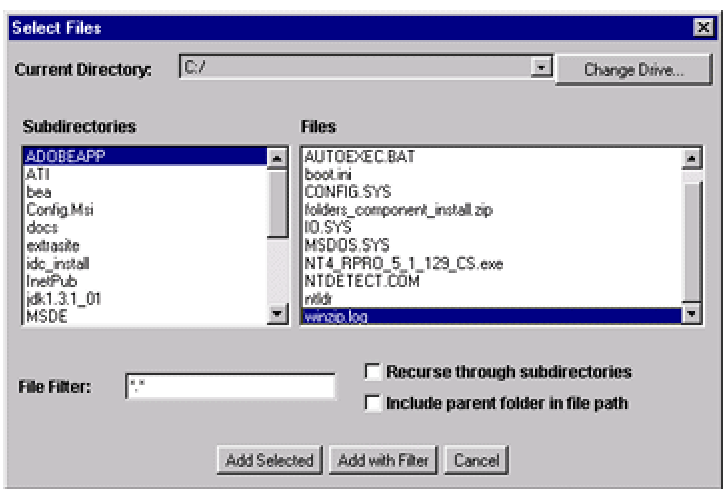
Select File Window



The Select File window is used to select individual files to be included in the uploaded Zip file (see Checking in Multiple Files Using Upload on page 7-18). To access this window, click **Select File** in the Upload Files window (page 7-13).

Feature	Description
Look in field	Select the directory where the file is located.
Contents list	Select the file to be included in the zip file.
File name field	You can filter the files by typing a wildcard expression, such as *doc*.**.
Files of type field	You can filter the files in the current directory by selecting a file type.
Open button	Places the selected file in the Files to Upload list in the Upload Files window.
Cancel button	Closes the Select File window without selecting any files.

Select Files Window



The Select Files window is used to select multiple files from the same directory to be included in the uploaded zip file (see Checking in Multiple Files Using Upload on page 7-18). To access this window, click **Select Multiple** in the Upload Files window (page 7-13).

Feature	Description
Current Directory field	Shows the directory currently selected.
Change Drive button	Displays the Change Drive window (page 7-17).
Subdirectories list	Select the subdirectory where the files are located. Double-click the ".." entry in this list to navigate to the parent directory.
Files list	Select specific files to be included in the zip file. • Holding down the Ctrl key and clicking on files selects non-contiguous files. • Holding down the Shift key and clicking two files selects contiguous files.
File Filter field	All files that meet the criteria in this field will be selected when the Add with Filter button is clicked. • You can use the asterisk * (zero or more characters) and question mark ? (one character) as wildcards. • This field has no effect when the Add Selected button is clicked.
Recurse through subdirectories check box	Selects all files in all subdirectories of the current directory when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Include parent folder in file path check box	Store path information from the parent folder with the files you are adding when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Add Selected button	Places the selected files in the Files to Upload list in the Upload Files window (page 7-13).

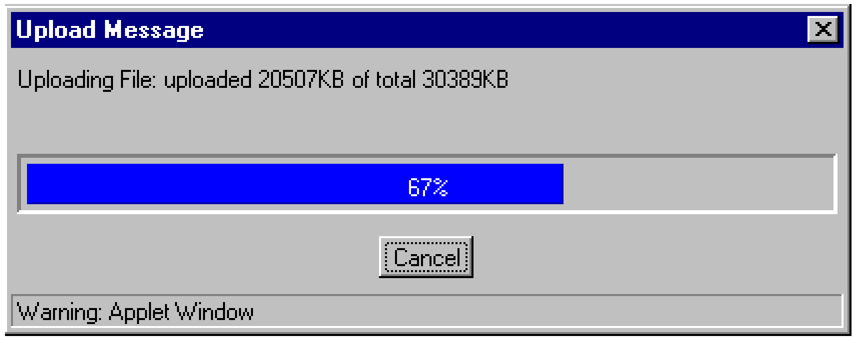
Feature	Description
Add with Filter button	Places files in the Files to Upload list in the Upload Files window (page 7-13), based on the *File Filter* field, *Recurse through subdirectories* check box, and *Include parent folder in file path* check box.
Cancel button	Closes the Select Files window without selecting any files.

Change Drive Window

The Change Drive window is used to change the drive where files to be included in the uploaded zip file are located (see Checking in Multiple Files Using Upload on page 7-18). To access this window, click **Change Drive** in the Select Files window (page 7-15).

Feature	Description
Drive list	Select the drive where the files to be selected are located.
OK button	Changes the drive displayed in the Current Directory field in the Select Files window (page 7-15).
Cancel button	Closes the Change Drive window without changing the drive.

Upload Message Screen



The Upload Message screen shows the upload progress when the chunking function is enabled. If the chunking function is not enabled on your system, this screen will not appear.

Checking in Multiple Files Using Upload

Use the following procedure to check in multiple files as a single content item in a compressed zip format using the upload applet:

Note: You can also check in multiple files by creating a compressed zip file **outside** of Content Server using a compression program such as WinZip or PkZip, and then checking in the zip file as a single file. For details refer to Checking In a New File (page 7-3).

1. Make sure that you have enabled the upload applet in your user profile. For details refer to Editing Your User Profile (page 4-12).
2. Follow the general check-in procedure for a new file (page 7-3), similar file (page 7-5), or revised file (page 7-5).
3. Before specifying the primary file or alternate file, select the corresponding **Upload Multiple Files** check box.
4. Click the corresponding **Browse** button.

   The Upload Files window is displayed (page 7-13).
5. (Optional) Change the default **Zip Name** to a more descriptive file name. Make sure that the file name ends in **.zip**.
6. Select the files to be checked in.

   Use the following procedure to select files one at a time:

a. Click **Select File**.

The Select File window is displayed (page 7-14).

b. Navigate to the file to add, and click **Open**.

The file is displayed in the Files to Upload list.

c. Repeat the previous two steps as necessary to select individual files.

Use the following procedure to select multiple files at a time:

a. Click **Select Multiple**.

The Select Files window is displayed (page 7-15).

b. To select the drive where the files are located, click **Change Drive**, select the drive on the Change Drive window (page 7-17), and click **OK**.

c. Navigate to the directory and/or files to add. The **Subdirectories** list shows the contents of the directory where you are currently located. To navigate to the parent directory, double-click the ".." entry in the Subdirectories list.

d. To select multiple files in the **Files** list:
   - To select non-contiguous files, hold down the Ctrl key and click on each file.
   - To select contiguous files, hold down the Shift key and click the first and last file.

e. To narrow the selection of files, use the **File Filter** field. For example, the filter **.doc* selects all files with a *.doc* extension.

f. To select all files in all subdirectories of the current directory, select the **Recurse through subdirectories** check box.

g. To store path information (from the parent folder) with the files you are adding, select the **Include parent folder in file path** check box.

h. Click the button appropriate to your selection: **Add Selected** or **Add with Filter**.

i. The selected files are displayed in the Files to Upload list.

j. Repeat these steps as necessary to add files from other directories or drives.

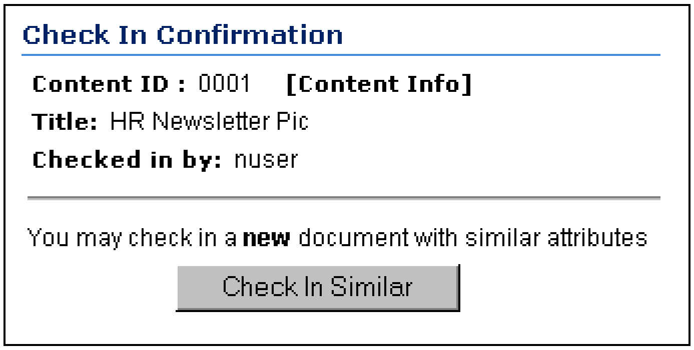
7. Verify that the correct files are shown in the **Files to Upload** list, and click **OK**.

   The zip file name appears in the Primary File or Alternate File field.

8. Follow the general check-in procedure to complete the check-in. For details refer to Checking In a New File (page 7-3).

   If the chunking function is enabled, the Upload Message screen (page 7-18) displays a progress bar during upload.

CHECK-IN CONFIRMATION PAGE



The check-in confirmation page is displayed after you have checked in a content item successfully.

Feature	Description
Content ID field	The unique content ID that you entered during check-in or that was generated automatically by the system.
[Content Info] link	Displays the content information page (page 6-7) for the content item.
Title field	The title of the content item that you checked in.
Checked in by field	The login you used to check in the file.
Check In Similar button	Displays the content check-in form (page 7-7) with metadata values similar to the content item you just checked in already filled in.

IMPORTANT CONSIDERATIONS

Please note the following considerations

❖ Multi-Byte Characters (page 7-21)

❖ Checking in Microsoft Office XP Files (page 7-21)

Multi-Byte Characters

You should not use multi-byte characters (for example, Japanese or Korean) in content IDs and content types—even if Content Server is to be used in a multi-byte environment. The values of these fields are included in the URLs of content items, and limitations in current web technology prevent web servers and browsers from handling URLs with multi-byte characters correctly.

If you want to use multi-byte characters in content IDs and/or content types, you need to ask your content server system administrator if the **entire** content server environment—all servers and **all** clients—runs on operating systems that support multi-byte languages (for example, Japanese or Korean versions of Microsoft Windows). Otherwise errors may occur, such as links to PDF renditions of content items not working, Dynamic Converter failing to find content items, etc.

Checking in Microsoft Office XP Files

It is important to be aware of the following considerations when checking in Microsoft Office XP files:

❖ If your system is using a Verity search engine prior to version 4.5.1 and you check Microsoft Office XP files into Content Server, the native files will **not** be included in the search index. This is due to limitations in the third-party search engine technology used with Content Server.

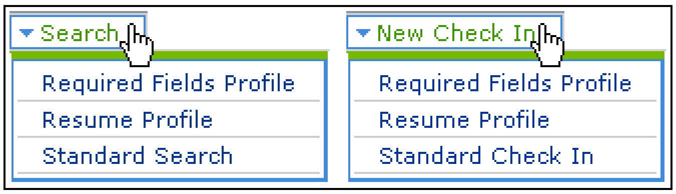
❖ If your system is using Verity version 4.5.1 or greater, Office XP files **will** be indexed, or if your system uses PDF Converter to convert Microsoft Office XP files, the PDF versions of the files will be indexed.

Note: Check with your system administrator if you are uncertain which third-party search engine is used by your system, and how it handles full-text indexing of files.

Content Profiles

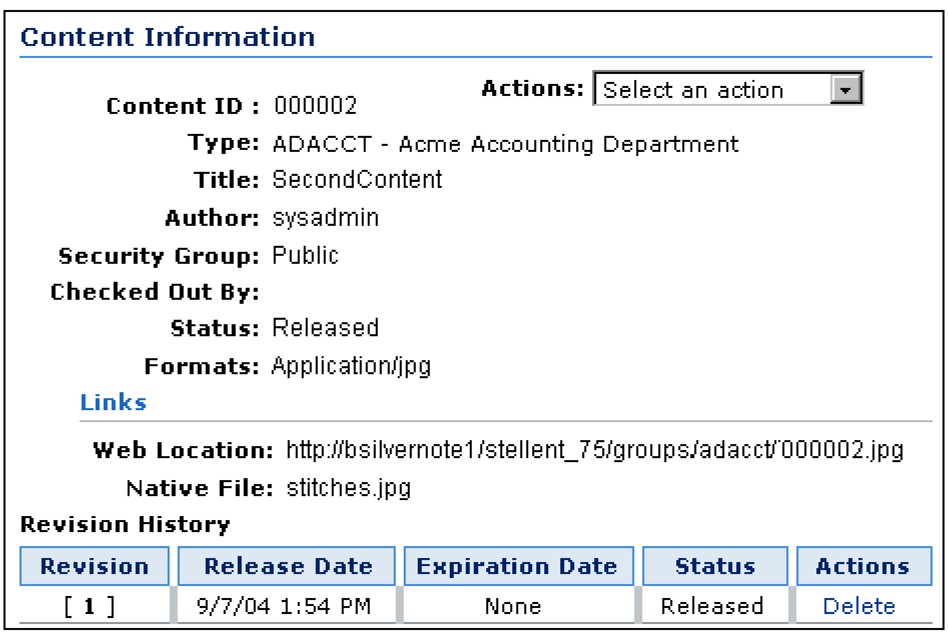
Content profiles are defined by your system administrator, and determine what metadata fields are displayed and how they are grouped and titled on the associated check in, search, and information pages based on rules established by the system administrator. By default, all content profiles are displayed as links under both the Search and New Check In drop-down lists on the Toolbar (page 4-5). The links can be hidden using the Edit Content Profile Links Page (page 4-46) to disable the desired link.

Figure 7-2 Content Profile links under the Search and New Check In drop-down lists on the Toolbar



If you access a search or check in page using a content profile link, you may not have access to all available metadata fields, either for searching or use when checking in a content item. Also, if you access the Content Information Page (page 6-7) of a content item that meets criteria established by the system administrator, the initial information displayed may not be the full information available.

Figure 7-3 Content Information Page streamlined by content profiles



Chapter

8

Checking Out Files

Overview

This section covers the following topics:

About File Check-Out

Check-out is the process of locking a content item so that no other users can revise it. You must have write permission to the content item to check out a file or undo a check-out. Only one user at a time can check out a file; however, multiple users can continue to view the released file.

There are two approaches to checking out files:

❖ For content items that could be revised by other users, it is a good idea to check out the file as soon as you know that you need to edit it. This notifies other users that you will be making changes and prevents them from checking in a new revision.

- For content items that are unlikely to be revised by other users, you can make revisions to a copy of the file, check out the content item, and immediately check it back in with the edited file.

Once you have checked out a content item, you can either check in a revision or undo the check-out.

Checking Out Single Files

Use either of the following procedures to check out a single file:

- From a Content Information Page (page 8-2)
- From a Search Results Page (page 8-2)

From a Content Information Page

1. Display the content information page (page 6-7) of the content item you want to check out.
2. Select **Check Out** from the Actions drop-down list ( ).

   The Check-Out Confirmation page is displayed (page 8-11).
3. If applicable, click **Native File Link** to get a copy of the native file.
4. If a dialog window appears before the Save As window, choose to save the file to disk.
5. On the Save As window, navigate to the location where you want to save the file and click **Save**.
6. Start the native application (for example, Word, PowerPoint, etc.) and locate the file where you saved it in step 5.
7. Edit the file in its native application and then save the file.

From a Search Results Page

1. Search for content to view a search results list.
2. Select **Headline View** or **Thumbnail View** from the **Actions** drop-down list ( ).
3. Click the **Action** icon ( ) and select **Check Out** from the contextual menu.

   The Check-Out Confirmation page is displayed (page 8-11).
4. If applicable, click **Native File Link** to get a copy of the native file.

5. If a dialog window appears before the Save As window, choose to save the file to disk.
6. On the Save As window, navigate to the location where you want to save the file and click **Save**.
7. Start the native application (for example, Word, PowerPoint, etc.) and locate the file where you saved it in step 6.
8. Edit the file in its native application and then save the file.

Checking Out Multiple Files

This section covers the following topics:

About Multiple File Check-Out

You can get a copy of multiple content items at one time using the download applet. When you download files, you also have the option to check out the content items and/or uncompress any compressed zip files.

Download Applet Requirements

You can use the download applet to check out multiple files only if the following conditions are all true:

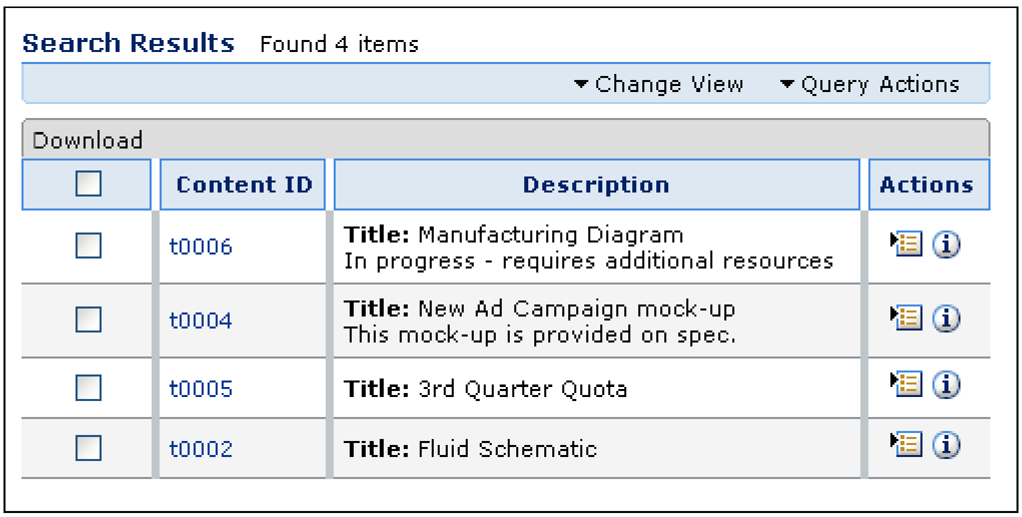
The system administrator has enabled the download applet on the content server.

- The **Enable download applet** check box is selected in your user profile (page 4-15).
- You are using a Java-enabled web browser.

The download applet requires permission to access the local drive. When you run a search for the first time after enabling this applet, you may see a Java security warning:

- ❖ If your system is using the Sun Java plug-in, when you encounter this message box, click **Run**. If you do not want to be prompted again with this message box, select **Always trust content from this publisher**, and then click **Run**.
- ❖ If your system is using the Microsoft plug-in for Internet Explorer, click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Oracle Incorporated**, and click **Yes**.

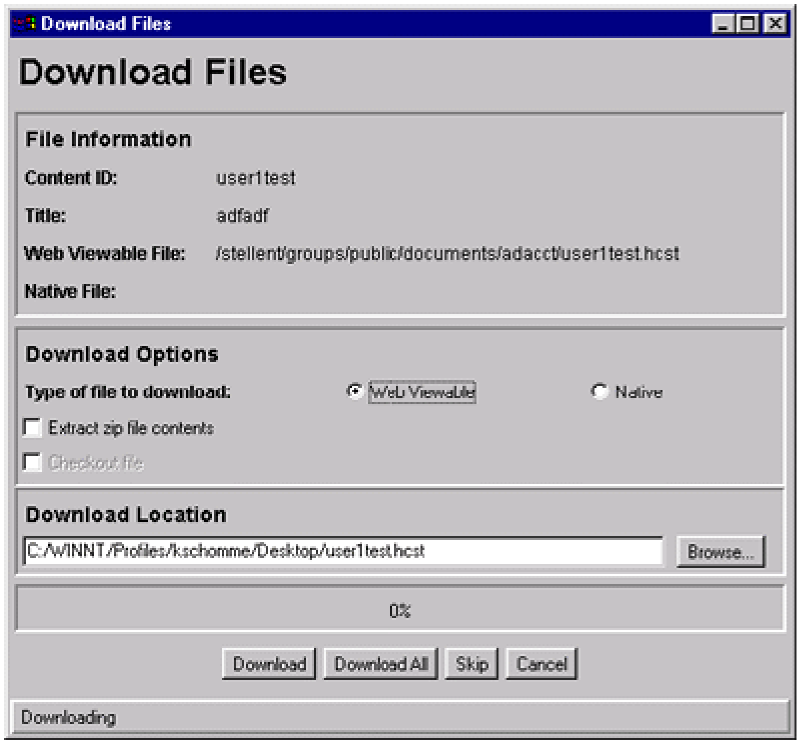
Download Options on Search Results Pages



When the download applet is enabled, the following features are added to search results pages:

Feature	Description
Download selected option on Table Action menu	Downloads the selected content items.
Select All check box	Selects all items in the search result list.
Select check boxes	Selects content items to be downloaded when the Download Selected button is clicked.

Download Files Screen

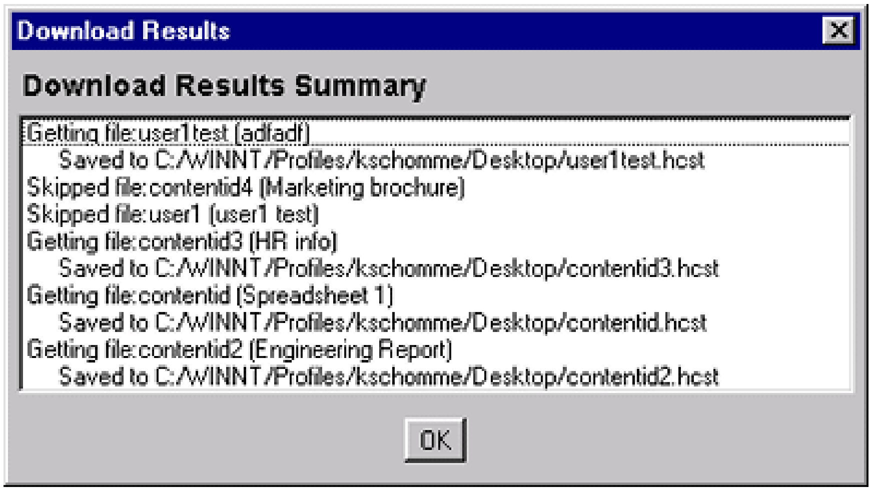


The Download Files screen is used to specify download options and the target directories for files being downloaded from the content server. To access this screen, click **Download Selected** or **Download All** on the Download Options on Search Results Pages (page 8-4).

Feature	Description
Content ID field	The content ID of the file.
Title field	The descriptive title of the content item.
Web Viewable field	The path and file name of the content item's web-viewable file.
Native field	The file name of the content item's native file. This field is filled in when the Native option is selected.

Feature	Description
Type of file to download options	**Web Viewable—**Specifies that the web-viewable file is to be downloaded. **Native—**Specifies that the native file is to be downloaded.
Extract zip file contents check box	**Selected—**Files in zip format will be uncompressed when they are downloaded. **Clear—**Files in zip format will be downloaded as is.
Check out file check box	**Selected—**Content items will be checked out as well as downloaded. **Clear—**Content items will only be downloaded and will not be checked out. This check box is available only when the Native option is selected.
Download Location field	The directory and file name where the current file will be copied. Click the Browse button to navigate to and select the directory.
Progress bar	Shows the progress of the download as a percentage.
Download button	Downloads the current file to the specified directory.
Download All button	Downloads all files that have not been skipped to the specified directory. This button is not displayed if only one file was selected on the search results page.
Skip button	Excludes the current file from the download. This button is not displayed if only one file was selected on the search results page.
Cancel button	Closes the Download Files screen.

Download Results Summary



The download results summary displays a log of the downloaded files. This screen is displayed when the download process is complete.

Downloading Multiple Files

Use the following procedure to download and check out multiple content items using the download applet:

1. Locate the files to download by drilling down the hierarchical link structure (the “Library”) or by performing a search. For details refer to Chapter 5 (*Finding Files)*.

   The Download Search Results page is displayed (page 8-4).

2. To download all content items on the Search Results page, click **Download All**.

3. To download selected content items, select the corresponding **Select** check boxes and click **Download Selected**.

   The Download Files screen is displayed (page 8-5).

4. Select the type of file to download: **Web Viewable** or **Native**.

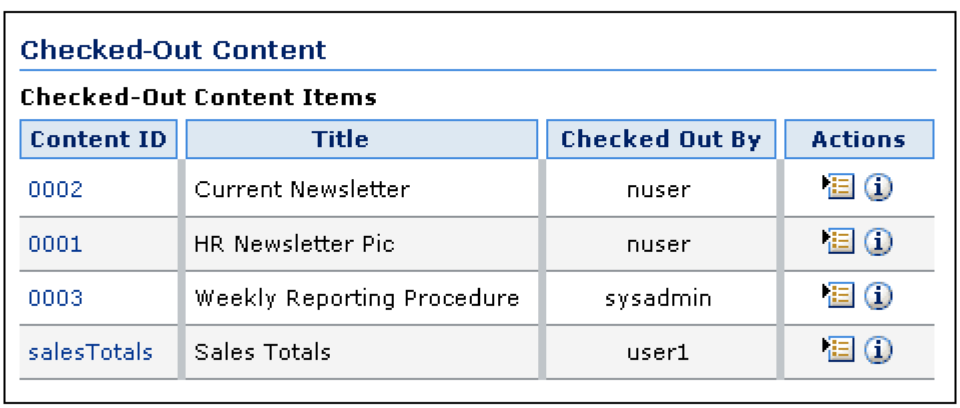
5. To uncompress zip files during the download process, select the **Extract zip file contents** check box.

6. If you selected the Native option and you want to check out the content items upon download, select the **Check out file** check box.

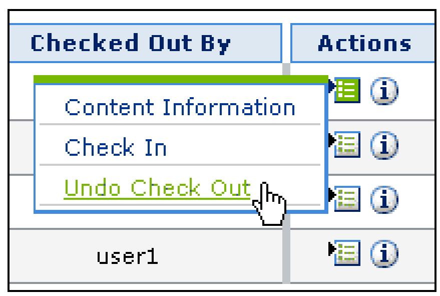
7. In the **Download Location** field, enter the path where you want the files to be copied. You can click **Browse** and navigate to the directory to select it.
8. If you want a different file name for the downloaded file, change the file name in the **Download Location** field. (This applies only to the current file; if you click **Download All**, all other files will retain their default file names.)
9. Click one of the following buttons:
   - ❖ **Download**—to download the current file only.
   - ❖ **Download All**—to download all selected files that have not been skipped (you will not be prompted for each file that was selected).
   - ❖ **Skip**—to not download the current file and go to the next selected file.
   - ❖ **Cancel**—to cancel the download.
10. If a file with the same file name already exists in the target location, you will be asked whether you want to overwrite it. Click a button to indicate whether you want to overwrite one or more files.

    When downloading is complete, the Download Search Results page (page 8-4) is displayed.
11. Click **OK**.

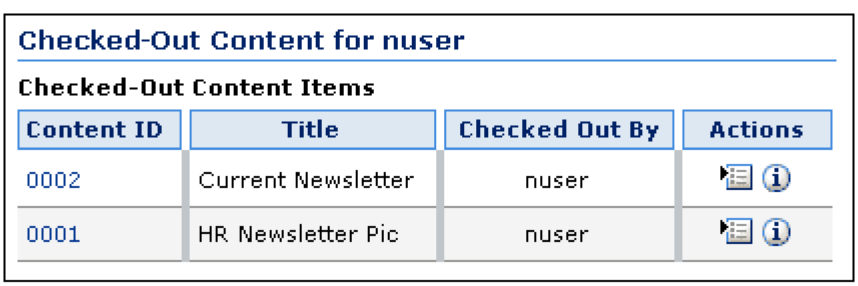
CHECKED-OUT CONTENT PAGE



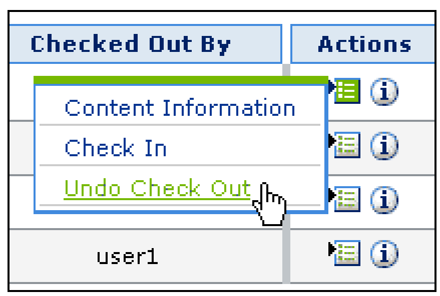
The checked-out content page is used to identify which files are checked out. To access this page, click **Checked Out Content** on the Content Management tray (page 4-6).

Feature	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.
Action icon ( )	Displays a contextual menu allowing you to display the content information page (page 6-7), check in the content item, or undo the check-out of the content item, depending on your access rights. **Figure 8-1** Item Action Menu 
Info icon ( )	Displays the content information page for the content item (page 6-7).

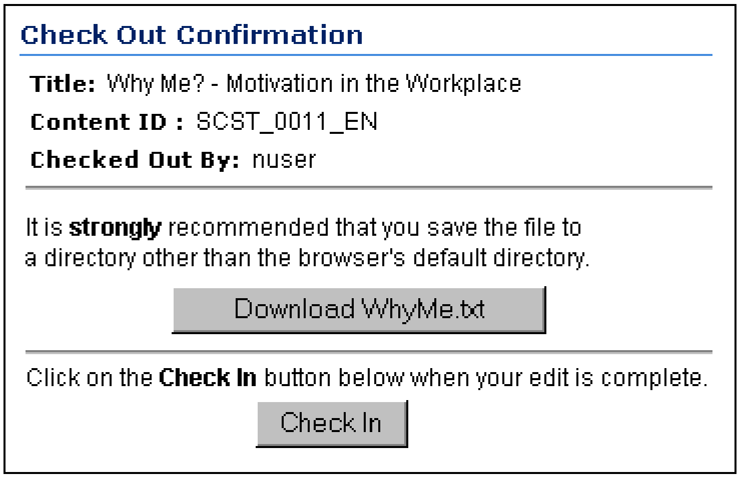
Checked-Out Content for *[User]* Page



The Checked Out Content for *[User]* page is used to identify which files are checked out by the current user. To access this page, click **My Checked-Out Content** under the My Content Server tray (page 4-20).

Feature	**Description**
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.
Action icon ( )	Displays a contextual menu allowing you to display the content information page (page 6-7), check in the content item, or undo the check-out of the content item, depending on your access rights. **Figure 8-2** Item Action Menu 
Info icon ( )	Displays the content information page for the content item (page 6-7).

CHECK-OUT CONFIRMATION PAGE



The Check-Out Confirmation page is displayed after you have checked out a single content item successfully.

Feature	Description
Title field	The title of the content item that you checked out.
Content ID field	The content ID of the file that you checked out.
Checked Out By field	The login you used to check out the file.
Native File Link	Enables you to open or save a copy of the native file.
Check In button	Displays the content check-in form (page 7-7).

Chapter

9

WORKING WITH WORKFLOWS

OVERVIEW

This section covers the following topics:

- ❖ About Workflows (page 9-1)
- ❖ Participating in a Workflow (page 9-3)
- ❖ Viewing Workflow Information (page 9-12)

ABOUT WORKFLOWS

A workflow specifies how content is routed for review and approval before it is released to the system. Users are notified by e-mail when they have a file to review.

This section covers the following topics:

- ❖ Workflow Types (page 9-2)
- ❖ Workflow Steps (page 9-2)
- ❖ Post-Process Workflow Options (page 9-2)
- ❖ Workflow Process (page 9-3)
- ❖ Workflow Tasks (page 9-3)

Workflow Types

From a workflow participant's point of view, there are two types of workflows:

- A **basic** workflow defines the review process for specific content items, and must be initiated manually.
- In a **criteria** workflow, a file enters the workflow automatically upon check-in when its metadata matches predefined criteria.

Workflow Steps

Each workflow can include multiple review and notification steps, and multiple reviewers can be assigned to approve or reject the file at each step. For each step in a workflow, a set of users and a step type must be defined. The users defined for a step can perform only the tasks allowed for that step type:

Step Type	Description
Contribution	This is the initial step of a basic workflow. Contributors are defined when the workflow is created.
Auto-Contribution	This is the initial step of a criteria workflow. There are no predefined users involved in this step.
Review	Users can only approve or reject the file. Editing is not allowed.
Review/Edit Revision	Users can edit the file if necessary and then approve or reject it, maintaining a new revision.
Review/New Revision	Users can edit the file if necessary and then approve or reject it, creating a new revision.

Post-Process Workflow Options

Workflows or individual workflow steps can be set up to allow for items in review to be released into the system for indexing, searching, and viewing, even though the workflow to which they belong is not completed. This allows for greater flexibility in constructing workflows. For example, items in a workflow process can to be made available to others not in the workflow, or a workflow can be initiated to update the content information of an item without advancing the revision of that item.

Workflow Process

The workflow process is as follows:

- When a revision is approved by the minimum number of reviewers for a particular step, it goes to the next step in the workflow.
- If any reviewer rejects a revision, it goes back to the most recent contribution step for editing.
- When a revision is approved at the last step in the workflow, the content item is released to the system.
- A basic workflow containing multiple content items can be set up so that some items in the workflow may be released to the system before all of the revisions have completed the workflow.

Note: Depending on how your system administrator has set up the workflow, you may be required to enter your user name and password before continuing the workflow process on one or more steps. This re-authentication allows Content Server to track the successful completion of a step and provides a digital signature of the person responsible.

Workflow Tasks

These are the most common workflow tasks that you will perform:

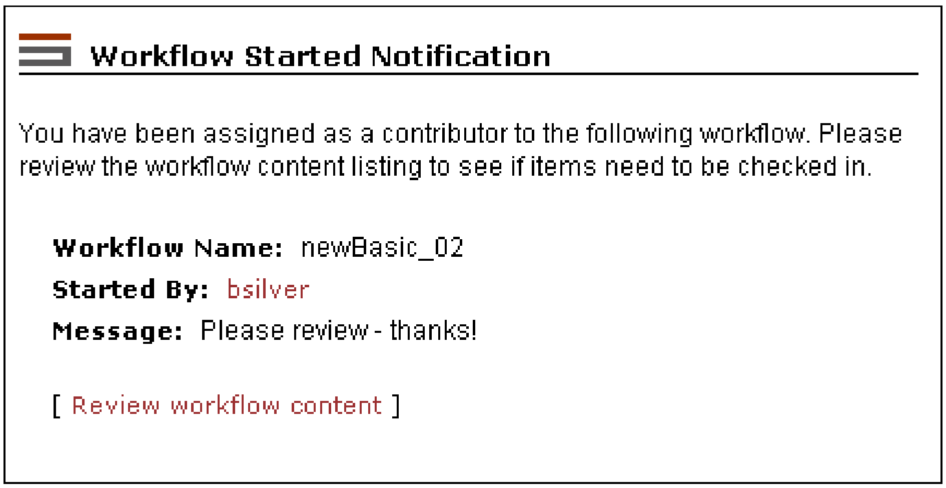
- Entering a File to a Workflow (page 9-9)
- Reviewing Revisions in a Workflow (page 9-10)
- Working with a Rejected Revision (page 9-11)

PARTICIPATING IN A WORKFLOW

This section covers the following topics:

- Workflow Started Notification (page 9-4)
- Workflow Review Notification (page 9-5)
- Workflow Content Items Page (page 9-5)

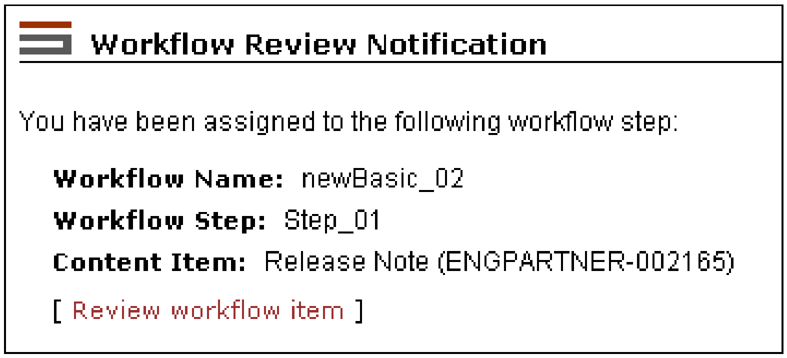
Workflow Started Notification



A workflow started notification message is e-mailed to you when you are assigned to check in a new file for a basic workflow. It is an automated message that you can use to identify the file that you need to check in and other workflow information.

Feature	Description
Workflow Name field	Identifies the workflow.
Started By field	Opens an e-mail to the person who initiated the workflow.
Message field	Displays a message from the person who initiated the workflow.
Review workflow content link	Opens the Workflow Content Items page (page 9-5).

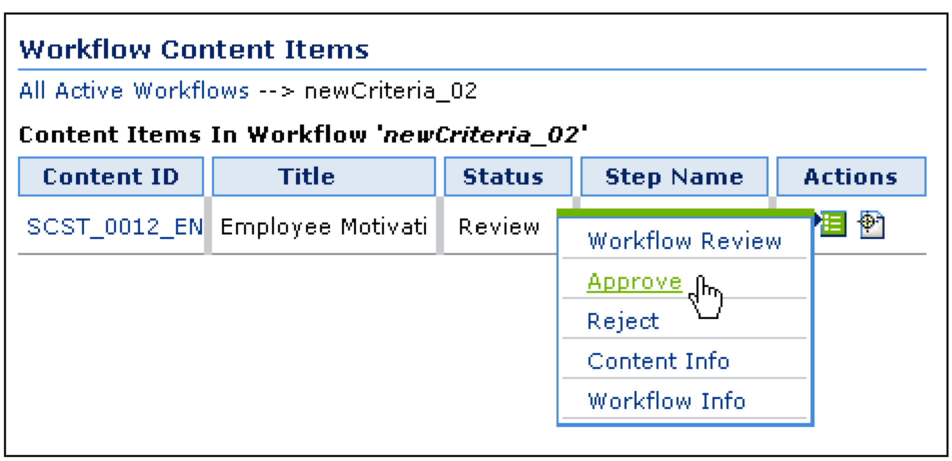
Workflow Review Notification



A workflow review notification message is e-mailed to you when you are assigned to review a revision in a workflow. It is an automated message that you can use to identify some workflow characteristics.

Feature	Description
Workflow Name field	Identifies the workflow.
Workflow Step field	Identifies the current step in the workflow.
Content Item field	Identifies the content item or items in the workflow.
Review workflow item link	Opens the Workflow Review page (page 9-18).

Workflow Content Items Page

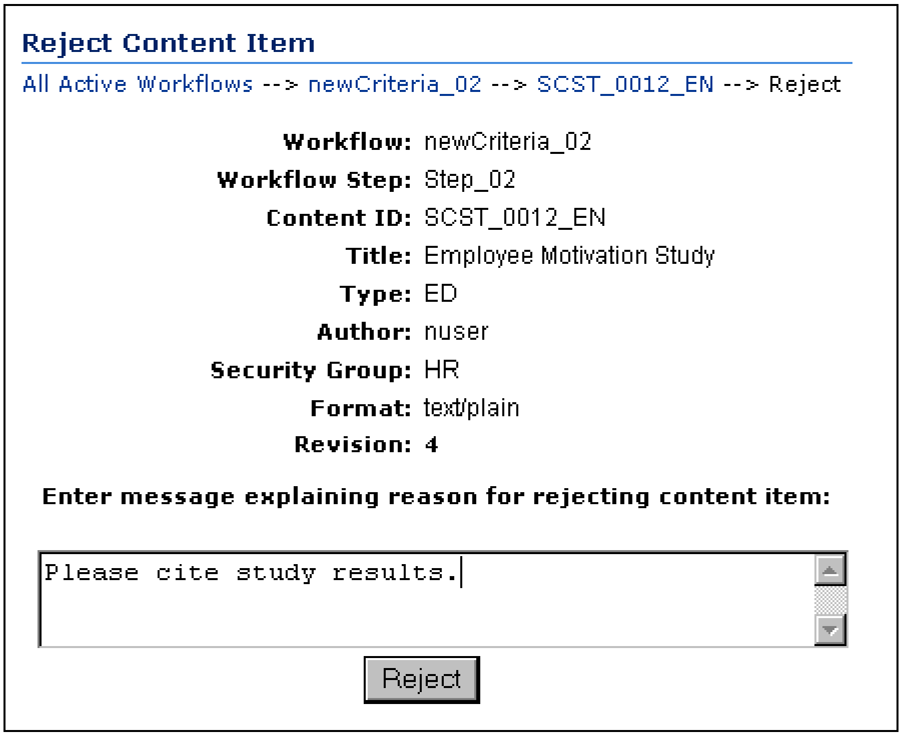


The Workflow Content Items page is used to identify which action to perform in the workflow. To access this page, click the **Review Workflow Content** link on a workflow started notification (page 9-4) or open the **Content Management** tray, click **Active Workflows**, and then the workflow name on the Active Workflows page (page 9-13).

Feature	Description
Breadcrumb links	Displays a hierarchical navigation within content server. Located just below the page title.
Content ID column	Click the content ID to display the web-viewable file.
Title	The title of the content.
Status column	The status of the revision. For details refer to Revision Status (page 6-4).
Step Name column	The name of the current workflow step.
Action icon ( )	Displays the actions (if any) that you can take on the content item: **Workflow Review**—Displays the Workflow Review page (page 9-18). **Approve**—Approves the revision. **Reject**—Rejects the revision and displays the Reject Content Item page (page 9-7). **Content Info**—Displays the content information page (page 6-7) for the revision. **Workflow Info**—Displays the Workflow Info for Item page (page 9-16) for the revision.
Info icon ( )	Displays the Workflow Review page (page 9-18) for the content item.

Note: Content security can affect what is displayed on the *Workflow Content Items* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is not displayed on the Workflow Content Items page. It is displayed on the *Workflow in Queue* page, but without providing access to the content or content information. This ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

Reject Content Item Page

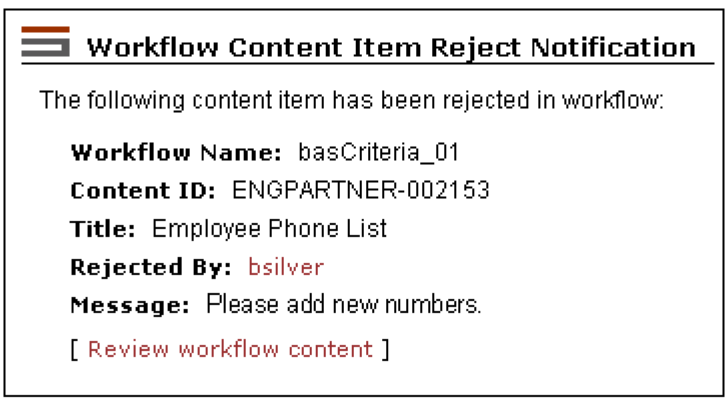


The Reject Content Item page is used to explain why you are rejecting a workflow revision. This page is displayed automatically when you reject a workflow item.

Feature	Description
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Workflow field	The name of the current workflow.
Workflow Step field	The name of the current workflow step.
Content ID field	The content ID of the content item.
Title field	The title of the revision.
Type field	The value associated with the Type metadata field.
Author field	The login associated with the user who checked in the file.

Feature	Description
Security Group field	The security group associated with the content item.
Format field	The formats corresponding to the file.
Revision field	The current revision of the content item.
Message field	Enables you to enter an explanation for why you are rejecting the revision. Include what should be done to ensure that the revision is approved in the future.
Reject button	Sends a workflow content item reject notification (page 9-8) to the previous contributor in the workflow.

Workflow Content Item Reject Notification



The workflow content item reject notification message identifies who rejected the revision and why it was rejected. When a revision is rejected and the Reject Content Item page (page 9-7) is filled out, this e-mail message is automatically sent to users assigned to the previous contribution step in the workflow.

Feature	Description
Workflow Name field	The name of the workflow.
Content ID field	The content ID of the rejected item.
Title field	The title of the rejected item.

Feature	Description
Rejected By field	The user name of the person rejecting the item. Click to send an e-mail to the person.
Message field	The message sent by the person rejecting the item.
Review workflow content link	Opens the Workflow Content Items page (page 9-5).

Entering a File to a Workflow

When a basic workflow is initiated, an e-mail message is sent to the contributors, who must check in the designated files as the first step in the workflow.

Use the following procedure to check in a file to begin a basic workflow:

1. Read the workflow started notification (page 9-4) message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items page (page 9-5) is displayed.
3. Select **Check Out** from the contextual menu under the Actions column.

   The check-out confirmation page (page 8-11) is displayed.
4. Check the content item into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Actions column on the Workflow Content Items page.
   - Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
5. Fill in the content check-in form.
   - If you select the **Revision Finished Editing** check box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** check box unchecked, the file is checked in but remains in Edit status instead of moving to GenWWW status. You will need to return to step 3 to check out the file and check it back in.

Tech Tip: If a document included in a workflow fails to convert in the check-in process, the content item will be set to Edit status automatically. To ensure that this does not occur, make sure that documents included in the workflow are valid for conversion.

6. Click **Check In**.

Note: Depending on how your system administrator has set up the workflow, you may be required to enter your user name and password before continuing the workflow process on one or more steps. This re-authentication allows Content Server to track the successful completion of a step and provides a digital signature of the person responsible.

Reviewing Revisions in a Workflow

When the next step in a workflow is a review step, the reviewers receive an e-mail message.

Use the following procedure to review a file in a workflow:

1. Read the workflow review notification (page 9-5) message.
2. Click the **Review Workflow Item** link.

   The Workflow Review page (page 9-18) is displayed, indicating the actions that can be performed.

Note: For a reviewer step, you will be able to **approve** or **reject** the content item. For a reviewer/contributor step, you will be able to **check out**, **approve**, or **reject** the content item.

3. Do one of the following to review the file:
   - Review the file as it is displayed to the right of the Workflow Review panel.
   - Click the **Web Viewable** link to see a version of the content in your browser.
   - Click the **Native File** link to save a copy of the file in its original format.
   - Click the **HTML Rendition** link to view the file as HTML in your browser.
4. If you have reviewer/contributor permission and you would like to edit the file, click the **Check out** link in the Workflow Review panel to check out the content item for editing. Otherwise, continue with step 9.

   The check-out confirmation page (page 8-11) is displayed.
5. Get a copy of the original file and edit it. For details refer to chapter 8 (*Checking Out Files*).

6. Check the content item back into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
   - Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
7. Fill in the content check-in form (page 7-7).
   - If you check the **Approve Revision** box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow when the required number of approvals is reached. Step 8 is not required.
   - If you leave the **Approve Revision** box unchecked, the revision is checked in but remains in Review status instead of moving to GenWWW status. You will still need to approve or reject the revision.
8. Click **Check In**.
9. Approve or reject the revision by clicking the appropriate link in the Workflow Review panel.
   - If the revision is approved by the appropriate number of reviewers, the content item goes to the next step in the workflow.
   - If the revision is rejected, the Reject Content Item page (page 9-7) is displayed so that the reviewer can enter a message explaining the reason for rejecting the content item. When a content item is rejected, it is sent back to the most recent workflow step that permitted contribution.

Note: Depending on how your system administrator has set up the workflow, you may be required to enter your user name and password before continuing the workflow process on one or more steps. This re-authentication allows Content Server to track the successful completion of a step and provides a digital signature of the person responsible.

Working with a Rejected Revision

When a revision is rejected, the users assigned to the most recent contribution step receive an e-mail message.

Use the following procedure to edit a file that was rejected:

1. Read the workflow content item reject notification (page 9-8) message.

2. Click the **Review Workflow Content** link.

   The Workflow Content Items page (page 9-5) is displayed.

3. Select **Check Out** from the contextual menu under the Actions column.

   The check-out confirmation page (page 8-11) is displayed.

4. Get a copy of the original file and edit it. For details refer to chapter 8 (*Checking Out Files*).

5. Check the content item back into the system using one of the following methods:

   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
   - Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.

6. Fill in the content check-in form (page 7-7).

   - If you check the **Revision Finished Editing** box, the file moves from Edit status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** box unchecked, the file is checked in but remains in Review status instead of moving to GenWWW status. You will still need to approve the file.

7. Click **Check In**.

VIEWING WORKFLOW INFORMATION

This section covers the following topics:

- Workflow Information (page 9-13)
- Active Workflows Page (page 9-13)
- Workflow in Queue Page (page 9-14)
- Workflow Info For Item Page (page 9-16)
- Workflow Review Page (page 9-18)
- Viewing a List of Active Workflows (page 9-19)
- Viewing a List of Your Workflows (page 9-19)

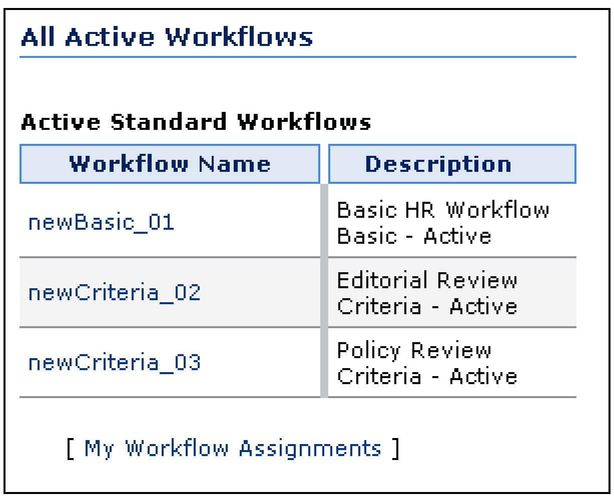
- Viewing Workflow History and Information About a Workflow Step (page 9-20)
- Viewing Content Information (page 9-20)

Workflow Information

There are several ways to view information about a content item in a workflow. Hyperlinks between workflow pages enable you to perform the following tasks:

- Viewing a List of Active Workflows (page 9-19)
- Viewing a List of Your Workflows (page 9-19)
- Viewing Workflow History and Information About a Workflow Step (page 9-20)
- Viewing Content Information (page 9-20)

Active Workflows Page



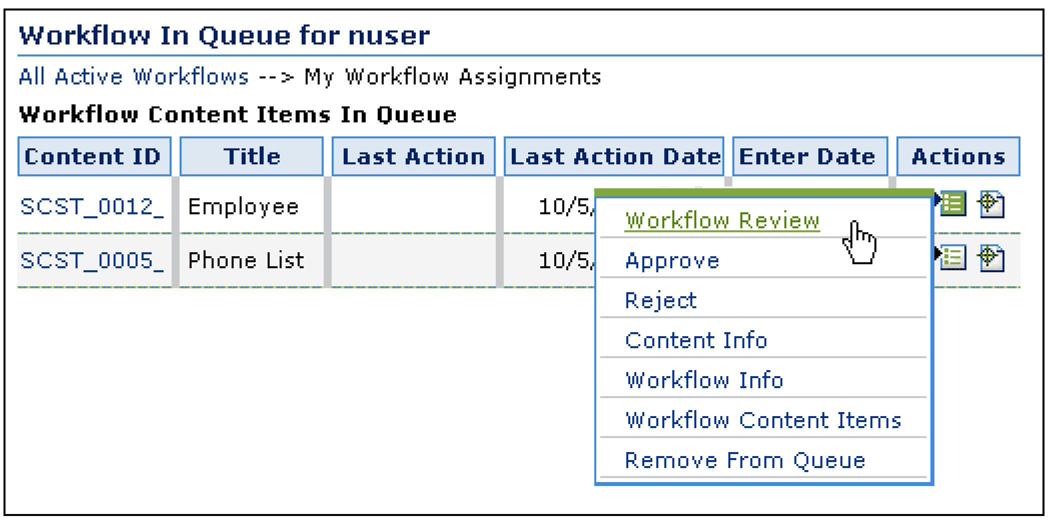
The Active Workflows page is used to view a list of all active workflows in the system. To access this page, click **Active Workflows** on the Content Management tray (page 4-6).

Feature	Description
Workflow Name column	The names of the active workflows in the corresponding security group. Clicking a link opens the Workflow Content Items page (page 9-5).

Feature	Description
Description	A description of the workflow
My Workflow Assignments link	Displays the Workflow in Queue page (page 9-14).

Note: Content security can affect what is displayed on the *Workflow Content Items* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is not displayed on the Workflow Content Items page. It is displayed on the Workflow in Queue page, but without providing access to the content or content information. This ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

Workflow in Queue Page

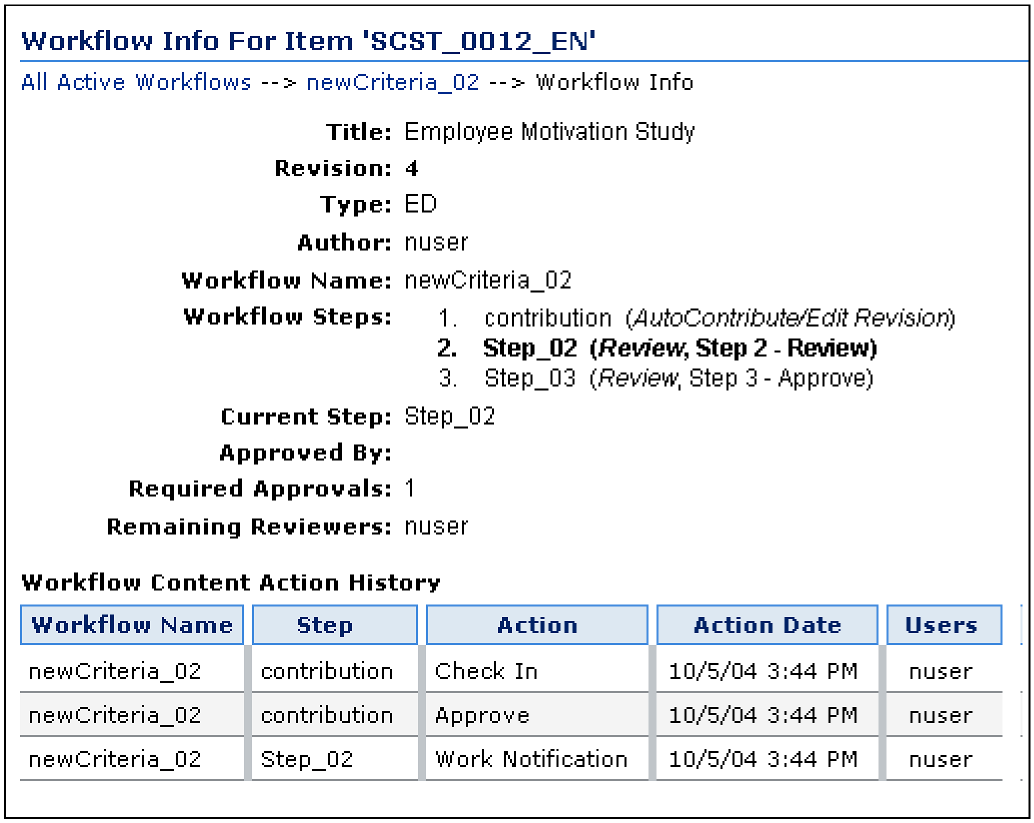


The Workflow in Queue page is used to view a list of all content items that you need to review. To access this page, click **My Workflow Assignments** under the My Content Server tray (page 4-20).

Feature	Description
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Content ID column	Displays the content ID and the title of each workflow item. Clicking the content ID link displays the web-viewable file.
Title	The title of the workflow.
Enter Date column	The date and time that the content item entered the current step.
Action icon ( )	Displays the actions (if any) that you can take on the content item: **Workflow Review**—Displays the Workflow Review page (page 9-18). **Approve**—Approves the revision. **Reject**—Rejects the revision and displays the Reject Content Item page (page 9-7). **Content Info**—Displays the content information page (page 6-7) for the revision. **Workflow Info**—Displays the Workflow Info for Item page (page 9-16) for the revision. **Workflow Content Items**—Displays the Workflow Content Items page (page 9-5) for the revision. **Remove from Queue**—Removes the content item from the Workflow in Queue page. (The content item is not deleted from the workflow.)
Info icon ( )	Displays the Workflow Review page (page 9-18).

Note: Content security can affect access to content displayed on the *Workflow in Queue* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is displayed on the *Workflow in Queue* page, but without providing access to the content or content information. This ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

Workflow Info For Item Page

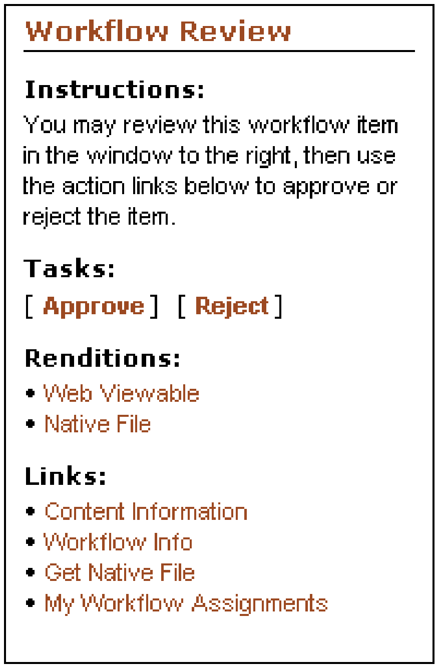


The Workflow Info page is used to identify where a revision is in the current workflow and to view the workflow history. To access this page, select **Workflow Info** from the contextual menu under the Actions column on the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14), or by clicking **Workflow Info** on the Workflow Review page (page 9-18).

Feature	Description
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Title field	The title of the content item.
Revision field	The current revision of the content item.
Type field	The value associated with the Type metadata field.

Feature	Description
Author field	The login associated with the user who checked in the file.
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page title.
Workflow Name field	The name of the current workflow.
Workflow Steps field	Lists all of the workflow steps. The current workflow step is in boldface type. The type of workflow step is shown in parentheses.
Current Step field	The current workflow step.
Approved by field	Lists the logins of the users who have approved the revision at the current workflow step.
Required Approvals field	Shows how many approvals are required at the current workflow step.
Remaining Reviewers field	Lists the users who have yet to review the revision for the current step.
Current Step's Additional Exit Condition field	Lists additional conditions beyond required approvals that must be met for the workflow step to be completed.
Workflow Content Action History field	Lists the actions that have been performed on the revision during the current workflow process.
Workflow Name column	The name of the workflow or sub-workflow.
Step column	The name of the workflow step.
Action column	The action that was performed on the revision.
Action Date column	The date and time that the action was performed.
Users column	The users that performed the action.

Workflow Review Page



The Workflow Review page offers several options for viewing and taking action on content in a workflow to which you have a responsibility. To access this page, click **Review Workflow Item** on the workflow review notification (page 9-5) or by selecting **Workflow Review** from the contextual menus under the Actions column on the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14).

Feature	Description
Instructions field	Displays instructions on how to proceed with the workflow.
Tasks links	Links to specific tasks you can perform in the workflow. **Approve**—Approves the revision. **Reject**—Rejects the revision and displays the Reject Content Item page (page 9-7). **Check Out**—Checks out a file and displays the check-in confirmation page (page 7-20). This link is displayed only if the current step is a reviewer/contributor step.

Feature	Description
Renditions	Links to specific tasks you can perform in the workflow. **Web Viewable**—Opens a version of the item in a format viewable in your browser, provided your system administrator has configured the content server to convert the item. **Native File**—Opens the item in your browser using the native application.
Links	Links to information relating to the item or workflow. **Content Info**—Displays the content information page (page 6-7) for the revision. **Workflow Info**—Displays the Workflow Info for Item page (page 9-16) for the revision. **Get Native File**—Prompts for you to open the item in its native application, or save a copy of the item in its native format. **My Workflow Assignments**—Displays the Workflow in Queue page (page 9-14).

Viewing a List of Active Workflows

Use the following procedure to view a list of all active workflows in the system:

1. Open the **Content Management** tray.
2. Click **Active Workflows**.

   The Active Workflows page (page 9-13) is displayed.

Viewing a List of Your Workflows

Use the following procedure to view a list of workflows for which action is required from you:

1. Open the **My Content Server** tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue page (page 9-14) is displayed.

3. To remove content items from the list, select **Remove from Queue from** the contextual menu under the Actions column. (The content item is not deleted from the workflow.)

Viewing Workflow History and Information About a Workflow Step

Use the following procedure to view workflow history and information about a workflow step:

1. Display either the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14).
2. Select **Workflow Info** from the contextual menu under the Actions column.

   The Workflow Info for Item page (page 9-16) is displayed.

Viewing Content Information

Use the following procedure to view content information for a revision in a workflow:

1. Open the **My Content Server** tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue page (page 9-14) is displayed.
3. Select **Content Info** from the contextual menu under the Actions column.

   The content information page (page 6-7) is displayed.

Chapter

G

GLOSSARY

access

The level of permission a member has to a content item. See also permission (page G-15).

account

A Oracle security element that enables greater flexibility and granularity in a security structure than security groups provide. Content can be assigned to a particular account upon check-in, and users can access the content only if they have the appropriate permission to that account. See also security group (page G-21), documents without accounts (page G-7), #none (page G-14), and #all (page G-3).

account hierarchy

Structure whereby accounts are ordered in levels (for example, Company/Region/Store). Permission to a particular level in the account hierarchy also permits access to all of its sub-level accounts.

account prefix

Permission to an account prefix grants access to all accounts with that prefix. For example, permission to the "ACME" account provides access to all content checked in with any account that begins with *ACME*, such as "ACME/Midwest" or "ACME/Midwest/Store_1".

active report

A list that contains the results of a database query that is dynamically generated each time the report page is accessed. This type of report always reflects current content server information. Active reports are accessed through the hierarchical link structure (the "Library"). See also historical report (page G-10).

administration applets

See administration application (page G-2).

administration application

One of the following Java applications that are used for administration purposes: User Admin (page G-23), Workflow Admin (page G-25), Web Layout Editor (page G-24), Repository Manager (page G-18), Configuration Manager (system administrator only), Archiver (system administrator only).
These applications can be run as a Java applet from a Java-enabled browser, or in stand-alone mode from the content server computer.

administration rights

Permission to use an administration application (page G-2). A user must also have admin permission (page G-2) to at least one security group to be able to use the administration applications for which they have rights.

administrator

Person in an organization that manages all or part of a content server system. See also consumer (page G-5), contributor (page G-6), subadministrator (page G-21), and system administrator (page G-22).

admin permission

The permission level that allows users to perform the following tasks within a particular security group:
– viewing content
– checking in content
– checking out content
– getting a copy of content
– deleting content
– checking in content with another user specified as the author;
– using the User Admin, Workflow Admin, Web Layout Editor, and Repository Manager administration applications (the user must also have administration rights for the application).
See also read permission (page G-17), write permission (page G-25), and delete permission (page G-7).

admin role

A standard role (page G-19) that gives the user read, write, delete, and admin permission to all security groups and rights to all administration tools. This role does not allow a user to access the Admin Server. See also guest role (page G-10), contributor role (page G-6), and sysmanager role (page G-22).

Advanced Search

A function that enables users to search by full-text and/or all metadata fields, specify search operators, and specify how search results are to be displayed. See also Quick Search (page G-17).

alias

A name that represents one or more users in workflows and subscriptions. For example, the “Sales” alias could include all users in a sales department.

#all

A special account (page G-1) classification that can be used to assign a user a single permission level for all accounts.

alternate file

A web-viewable version of the primary file, or a version that can be converted to a web-viewable format upon check-in. The alternate file must be specified and checked in at the same time as the primary file. See also primary file (page G-16).

approve

To accept a revision in a workflow. See also reject (page G-17).

ascending sort order

Arrangement of data in a low to high sequence; for example, from A to Z or from 0 to 9. See also descending sort order (page G-7).

authentication

The process by which the content server system validates a user’s logon information. The user name and password are compared against an authorized list. If the system detects a match, access is granted to the extent specified in the permissions list for that user.

authorization type

The way that Oracle groups users, depending on how their user attributes are defined: local user (page G-12), global user (page G-9), or external user (page G-8). Also referred to as *user type*.

automatic numbering

Assigning content IDs automatically in sequential order as new content items are checked in. This is an optional content server feature that can be enabled or disabled in the System Properties utility or the Admin Server.

autonumber prefix

An optional prefix that is placed before the sequential portion of the content ID when automatic numbering (page G-4) is enabled.

basic subscription

A subscription to an individual piece of content by content ID. See also criteria subscription (page G-6), forced subscription (page G-9), and open subscription (page G-14).

basic workflow

A type of workflow where specific content items are entered into a workflow by an administrator. See also criteria workflow (page G-6).

caption

See field caption (page G-8).

check in

To submit a file to the content server file repository.

check out

To lock a content item in the content server file 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 check-out (page G-23).

check out and open

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

child

A page or folder that is one level lower in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also parent (page G-15).

choice list

See option list (page G-14).

Classic View

A predefined search result template showing a thumbnail, title, and other content information for each returned content item on multiple lines of a search result list.

consumer

A content server user who only needs to find, view, and/or print content. See also contributor (page G-6), subadministrator (page G-21), and administrator (page G-2).

consumption site

A website that content consumers use to view content. Content contributors use a different website (a contribution site) to check in content.

content

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

content ID

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

content information

See metadata (page G-12).

content item

A file that has been checked in to the Content Server repository. A content item includes a primary file (page G-16) and metadata (page G-12), and can include an alternate file (page G-3).

content profile

A set of criteria based on rules established by the system administrator to define which metadata fields are available on search and check in forms and how they behave, and which metadata information is displayed on the content information page.

content repository

The place where content files are stored. Content Server uses two file repositories: one for the native files and one for the web-viewable files.

content type

A designation used to group similar content by category (for example, “Invoices”).

contribution site

A website that content contributors use to check in content. Content consumers access a different website (a consumption site) to view the content.

contributor

(1) A content server user who creates, revises, and collaborates on documents. See also consumer (page G-5), subadministrator (page G-21), administrator (page G-2).
(2) A user who submits a content item to a basic workflow.

contributor role

A standard role (page G-19) that gives the user read and write permission (RW) to the Public security group. See also guest role (page G-10), admin role (page G-3), and sysmanager role (page G-22).

conversion

The process of changing an electronic file to a different file format (for example, changing a Microsoft Word document into PDF or HTML format).

core

The basic functionality of Content Server.

criteria subscription

A subscription to a group of content items based on metadata criteria. See also basic subscription (page G-4), forced subscription (page G-9), and open subscription.

criteria workflow

A type of workflow where a content item automatically enters the workflow if the security group and one metadata field match predefined criteria. See also basic workflow (page G-4) and sub-workflow (page G-22).

current revision

See latest revision (page G-11).

custom metadata field

An administrator-defined metadata field (page G-12).

Deleted status

The revision status (page G-19) that indicates that the revision has been deleted and is waiting to be completely removed from the content server during the next indexing cycle.

delete permission

The permission level that allows users to perform the following tasks within a particular security group:

– viewing content
– checking in content
– checking out content
– getting a copy of content
– deleting content.

See also read permission (page G-17), write permission (page G-25), and admin permission (page G-2).

dependent choice list

An option list in which the options depend on what is selected in a different option list. For example, if there is an option list for the Continent field and another option list for the Country field, the available choices in the Country option list depend on which Continent is selected.

descending sort order

Arrangement of data in high to low sequence; for example, from Z to A or from 9 to 0. See also ascending sort order (page G-3).

documents without accounts

A special account (page G-1) classification that assigns a permission level for content items that do not have an account specified. Same as #none (page G-14).

document type

A designation used to group similar documents by category (for example, “Invoices”).

Done status

The revision status (page G-19) that indicates that the revision has been indexed and is waiting to be released on its specified release date.

download

To copy a file from the content server to your local hard disk.

download applet

An optional Java applet that enables users to download multiple content items at the same time. The content items can also be checked out during the download process. See also multiple file check-out (page G-13).

Edit status

The revision status (page G-19) that indicates that the revision is at the initial contribution step of a workflow.

Expanded Form

The form on the advanced search page that displays all available metadata fields on a single page. See also Query Builder Form (page G-16) and Advanced Search (page G-3).

expiration date

The date and time when a revision is no longer available for searching or viewing in the content server.

Expired status

The revision status (page G-19) that indicates that the revision is no longer available for searching or viewing in the content server.

external collection

A set of content files that are indexed and stored in a separate Verity collection rather than in the content server database.

external user

An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored in an external storage system. External users might use a Microsoft network login or another type of provider (LDAP) login. See also local user (page G-12) and global user (page G-9).

field caption

The name of a metadata field as it appears on web pages. For example, “Content ID” is the field caption, while the internal field name (page G-11) is “dDocName”.

file format

The structure of a file. The file format is determined by the application used to create the file, and can typically be determined by the file extension (such as *.pdf* or *.doc*).

forced subscription

A subscription where users and/or aliases are assigned to the subscription by an administrator. If individual users are assigned, each user can unsubscribe if they wish. If an alias is assigned, the users in that alias cannot unsubscribe. See also open subscription (page G-14), basic subscription (page G-4), and criteria subscription (page G-6).

full-text indexing

The process of creating a searchable index that includes every word in a file.

full-text search

A search that compares the query expression against every word in a file. See also metadata search (page G-12).

full-text search operator

A word or symbol that refines the query expression for a full-text search (for example, AND, OR, and double quotation marks ").

GenWWW status

The revision status (page G-19) that indicates that the revision is being converted to web-viewable format or is being indexed, or has failed conversion or indexing.

global user

An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored on master content server, but the user has access to proxied content servers as well. Global users are considered “lightly managed” users, as this authorization type limits some of the user functions in order to enhance scalability and performance. It should be noted that all self-registered users are global users by default. See also local user (page G-12) and external user (page G-8).

guest portal page

The web page that users see after they start Content Server but before they log in. See also login portal page (page G-12).

guest role

A standard role (page G-19) that gives the user read permission (R) to the Public security group. A login is not required to access content items in the security groups for which the *guest* role has permission. This role is assigned to anonymous users by default. See also contributor role (page G-6), admin role (page G-3), and sysmanager role (page G-22).

Headline View

A predefined search result template showing content information for each returned content item on a single line of a search result list.

historical report

A list that contains the results of a database query that was performed at a specific date and time. This type of report provides a "snapshot" of content server information as it existed at a particular moment. Historical reports are built with the Web Layout Editor and accessed through the Library. See also active report (page G-1).

Home page

See guest portal page (page G-9) and login portal page (page G-12).

Idoc Script

Oracle's proprietary server-side script language that is used to modify the functionality and look-and-feel of Content Server and related products. Idoc Script tags are in the format <$script$>.

Inbound Refinery

Content Server software that converts native files to web-viewable files, along with specific conversion add-on products (such as PDF Converter or XML Converter).

index

The name of the web page at the highest level of the Library hierarchy in the Web Layout Editor. All other pages are at a lower level than (are children of) the index page.

Indexer

Software included with Content Server that full-text indexes files and stores the indexed words in a database. When you do a full-text search for content, the Content Server looks for the search terms in this index. See also search index (page G-20).

information field

See metadata field (page G-12).

instance

A single copy of Content Server. Multiple content server instances may be running on the same computer.

internal field name

The name of a metadata field as it appears on web pages. For example, “Content ID” is a field caption (page G-8), while the internal name of the field is “dDocName”.

internet-style search syntax

Search techniques common to the most popular internet search engines.

latest notification

The most recent date and time that a user was sent a subscription notification e-mail for a particular content item.

latest notification use

The most recent date and time that a user accessed a particular content item from a subscription notification e-mail.

latest revision

The most recent version of a content item.

Library

A hierarchical structure of links that organizes content items based on metadata criteria. Users can “drill down” through the levels of the Library to find content items they are looking for. The Library hierarchy is built using the Web Layout Editor application, and is accessed by users through the Library link in the portal.

locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues, such as date formatting and full-text indexing. See also system locale (page G-22) and user locale (page G-24).

local page

A type of link in the hierarchical link structure (the “Library”) that links to another web page that contains more local page links, URL links, and/or query links.

local user

An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored on master content server, and the user is included in all local content server functions. See also global user (page G-9) and external user (page G-8).

log in

To gain access, or sign in, to the Oracle system. Logging in requires users to identify themselves by entering their user name and password, which Content Server uses to grant security permissions to content and rights to administrative functions.

login

See user name (page G-24).

login portal page

The web page that users see after they log in. See also guest portal page (page G-9).

major revision

The primary revision label (for example, the number portion of the revision sequence 1a, 1b, 2a, 2b). See also minor revision (page G-12).

metadata

Information about a content item, such as title, author, security group, etc. Metadata is used to describe, find, and group content items. Also referred to as *content information*.

metadata field

A field on a web page that is used to define metadata during check-in, or to define search criteria. Also referred to as *content information field*.

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 compares the query expression against metadata field values. See also full-text search (page G-9).

minor revision

The secondary revision label (for example, the letter portion of the revision sequence 1a, 1b, 2a, 2b). See also major revision (page G-12).

multiple file check-in

An optional feature of Content Server that enables users to check in multiple content items as a single compressed zip file. See also upload applet (page G-23).

multiple file check-out

An optional feature of Content Server that enables users to check out and download multiple content items at the same time. See also download applet (page G-8).

My Checked-out Content

Name of main menu element which provides links to a list of content that is currently checked out.

My Content Server

Name of main menu element which provides links to a number of user-specific tasks and options.

My Profile

Link in the toolbar (page G-23) and the My Content Server (page G-13) tray . See User Profile (page G-24).

My Saved Queries

Name of main menu element which opens a list of queries that have been saved by the current user.

My Search Result Templates

Name of main menu element which provides links to the Search Result Templates for 'User' Page (page 4-21), where you can specify what content item information is listed on a search results page and how that information is displayed.

My Subscriptions

Name of main menu element which opens a list of content items that the current user is subscribed to.

My URLs

Name of main menu element which opens a list of URLs that have been saved by the current user.

My View

Name of search result template which allows you to specify the displayed metadata and how it is organized.

My Workflow Assignments

Name of main menu element which opens a list of content items in a workflow that the current user is assigned to do something with (for example, review).

native application

A software application that was used to create an original file that was checked in to the content server (for example, Microsoft Word or Adobe Photoshop).

native file

The original file that is checked into the content server file repository. See also primary file (page G-16).

native file format

The file format (page G-9) that an original file was created in.

#none

A special account (page G-1) classification that assigns a permission level for content items that do not have an account specified. Same as documents without accounts (page G-7).

notification

The act of informing users through e-mail. In Content Server, e-mail notification is used in subscriptions and workflows.

open subscription

A type of subscription where users manually subscribe to content items through a basic or criteria subscription. See also forced subscription (page G-9), basic subscription (page G-4), and criteria subscription (page G-6).

option list

A drop-down list on a Oracle web page from which users can choose an item.

original file name

The name of the native file that was checked in as the primary file.

page properties

The page title, page description, security group, and links for a specific web page defined in the Web Layout Editor.

parent

A page or folder that is one level higher in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also child (page G-5).

pass through

The process of storing a native file in the *weblayout* repository without converting it to a web-viewable format. Inbound Refinery may pass through a file if it cannot be converted (for example, because the native application is not supported), if a pass-through file format is specified during check-in, or if there is no need to convert the file (for example, if the original file is already in PDF format).

Pending status

The revision status (page G-19) that indicates that the revision is in a basic workflow and is waiting for approval of all revisions in the workflow.

permission

The access that a user has to a particular security group or account. See also read permission (page G-17), write permission (page G-25), delete permission (page G-7), and admin permission (page G-2).

persistent URL

The URL (web address) that always points to the most recent version of a content item. When a new revision is checked in, the file name of the previous revision is changed to reflect the revision number (for example, 002050~1.pdf, 002050~2.pdf, etc.), and the new revision takes on the content ID as the file name (for example, 002050.pdf). The directory location of the file remains the same as long as the security group, Type, and account are not changed.

personal URL

A link from the portal navigation bar (page G-16) to a URL (web address) that a user accesses frequently.

Portal Design

A Content Server feature that enables users to personalize their portal navigation bar (page G-16).

portal navigation bar

The customizable navigation area on the left side of most Content Server web pages. See also portal page (page G-16)

portal page

See guest portal page (page G-9) and login portal page (page G-12).

primary file

The original file that is checked in to the Content Server repository. See also native file (page G-14) and alternate file (page G-3).

privilege

See permission (page G-15).

propagation

See metadata propagation (page G-12).

Public

A predefined security group (page G-21). By default, no login is required to view Public content.

query

See search (page G-20).

Query Builder Form

A form that allows queries to be built by using drop-down lists to select the metadata fields to be searched.

query expression

A statement that specifies the criteria to be matched during a search. See also search criteria (page G-20).

query link

A link on a Library (page G-11) page that displays a list of content items that meet the specified search criteria.

query result page

See search results page (page G-20).

Quick Help

A button on Oracle web pages that provides context-sensitive help.

Quick Search

A function that enables users perform a search from the portal navigation bar (page G-16). See also Advanced Search (page G-3) and Targeted Quick Search (page G-22).

read permission

The permission level that allows users to perform the following tasks within a particular security group:

- viewing content
- getting a copy of content.

See also write permission (page G-25), delete permission (page G-7), and admin permission (page G-2).

refinery

See Inbound Refinery (page G-10).

reject

To disapprove a revision in a workflow. See also approve (page G-3).

release date

The date and time when a revision is available for searching and viewing in the content server.

Released status

The revision status (page G-19) that indicates that the revision is available in the content server.

rendition

A particular file associated with a content item, such as the primary file (page G-16), alternate file (page G-3), or web-viewable file (page G-24).

report

A list that contains the results of a content server database query. There are two types of reports, active report (page G-1) and historical report (page G-10), which are built with the Web Layout Editor and accessed through the Library (page G-11).

repository

See content repository (page G-6).

Repository Manager

An administration application (page G-2) that is used to:

– manage content items (view status, delete revisions, etc.)
– create criteria subscriptions and assign users to subscriptions
– update and rebuild the search index.

required field

A metadata field (page G-12) that must have a value for a content item to be checked in.

reviewer

A user who can approve or reject a workflow revision but cannot check it out for editing. See also reviewer/contributor (page G-18).

reviewer/contributor

A user who can approve, reject, and check out a workflow revision for editing. See also reviewer (page G-18).

reviewer/contributor step

A type of workflow step where users can approve or reject a revision and check it out for editing. See also reviewer step (page G-18).

reviewer step

A type of workflow step where users can approve or reject a revision but cannot check it out for editing. See also reviewer/contributor step (page G-18).

Review status

The revision status (page G-19) that indicates that the revision is in a workflow and is being reviewed.

revision

A new or revised version of a content item. By default, revisions are numbered sequentially starting with Revision 1, and every time the content item is checked out and checked in again, the revision number is incremented by one.

revision history

A record of all revisions for a particular content item. The files and metadata can be accessed for all previous revisions that have not been deleted.

revision status

The status of a revision in the content server. The revision status can be Done, Edit, GenWWW, Released, Pending, Expired, Deleted, or Review.

rights

The access that a user has to any of the following administration applications:

– User Admin (page G-23)
– Repository Manager (page G-18)
– Workflow Admin (page G-25)
– Web Layout Editor (page G-24).

See also subadministrator (page G-21).

role

A set of permissions for each security group. Each user is assigned one or more roles that define their access to content. There are four predefined roles:

– guest role (page G-10)
– contributor role (page G-6)
– sysmanager role (page G-22)
– admin role (page G-3).

See also permission (page G-15) and security group (page G-21).

R permission

See read permission (page G-17).

RW permission

See write permission (page G-25).

RWD permission

See delete permission (page G-7).

RWDA permission

See admin permission (page G-2).

saved query
A link from the portal navigation bar (page G-16) to a particular search that a user performs frequently.

score
A search results sorting option that rates each file with a number to determine how closely it matches the full-text search criteria. The higher the score, the closer the match.

search
To retrieve a list of content items that match specified criteria.

search criteria
The metadata values and/or full-text words and phrases to be matched during a search. See also query expression (page G-16).

search engine
Software that performs metadata and full-text searches. See also search index (page G-20).

search index
A set of files that contain metadata information and the full-text indexes. The search index is created by the Indexer (page G-10) and is read by the search engine (page G-20).

search operator
A word or symbol that can be used in a query expression to refine the search criteria (for example, AND, OR, NOT, Substring, Matches, etc.).

search result templates
A way of determining what content item information is listed on a search results page and how that information is displayed.

search results
A list of content items that match specified search criteria.

search results page
Standard Content Server page that displays the results of a query. Also referred to as *query result page*.

Secure

A predefined security group (page G-21). By default, only the system administrator has access to this security group.

security group

A set of content items to which users are granted permission based on their roles. Each content item is assigned to a security group during check-in. There are two predefined security groups: Public (page G-16) and Secure (page G-21).

security model

The specific configuration of security groups, roles, and accounts that is defined for an organization.

self-registration

A function that enables users to create their own logins (user name and password).

sort order

The order in which content items are displayed on a search results page. By default, search results can be sorted by release date (page G-17), title (page G-23), or score (page G-20), and each of these options can be displayed in ascending sort order (page G-3) or descending sort order (page G-7).

status

See revision status (page G-19).

step

A sequential stage in a workflow that defines which users can review, approve, and reject a revision. There are two types of steps: reviewer step (page G-18) and reviewer/contributor step (page G-18).

subadministrator

A user who has rights to at least one administration application (page G-2). See also consumer (page G-5), contributor (page G-6), administrator (page G-2), and system administrator (page G-22).

subscribe

To indicate that you wish to be notified by e-mail when a new revision of a particular content item is checked in to the Content Server repository.

subscriber

A user who is subscribed to a content item.

subscription

A function that notifies subscribed users by e-mail when a particular content item has been revised. See also criteria subscription (page G-6), basic subscription (page G-4), forced subscription (page G-9), and open subscription (page G-14).

sub-workflow

A type of workflow that does not have an initial contribution step. A file can enter a sub-workflow only through a jump from a criteria workflow (page G-6).

sysmanager role

A standard role (page G-19) that gives the user read permission (R) to the Public and Secure security groups, and access to the Admin Server. See also guest role (page G-10), contributor role (page G-6), and admin role (page G-3).

system administrator

A user who has full administrative permission (page G-15) and administration rights (page G-2) to manage the Oracle system.

system locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues on a system-wide basis. See also user locale (page G-24).

Targeted Quick Search

A search executed using the Quick Search field that searches metadata fields or combinations of fields defined by the user or system administrator. See also Quick Search (page G-17).

thumbnail

A miniature representation of a page or image. In Content Server, thumbnails are created by the Inbound Refinery and displayed on search result pages.

Thumbnail View

A predefined search result template showing a thumbnail image of each returned content item in a search result list.

title

A descriptive name for a content item.

token

A piece of Idoc Script that defines variable users in a workflow.

toolbar

The set of navigation links at the top of most Oracle web pages.

undo check-out

To cancel a content item check-out without creating a new revision.

unsubscribe

To cancel a subscription (page G-22) to a content item.

update

To modify the metadata for a revision without checking out the content item or adding a revision.

upload applet

An optional Java applet that enables users to check in multiple content items as a single compressed zip file. See also multiple file check-in (page G-13).

user

A person who has been assigned a user name and password for Content Server.

User Admin

An administration application (page G-2) that is used to manage content server users and security access.

user ID

See user name (page G-24).

user information

Information about a user, such as the user name, full name, e-mail address, etc.

user information field

A field that is used to define user information on the User Profile page.

user locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues for an individual user. See also system locale (page G-22).

user login

A user name and password used to gain access to Content Server.

user name

The name of a user, as recognized by Content Server (for example, “mjohnson”).

User Profile

Personal information about a user, such as the user name, full name, e-mail address, etc. User information can be changed by an administrator through the User Admin administration application, or by the user on their User Profile page.

user type

See authorization type (page G-4).

WebDAV (Web-Based Distributed Authoring and Versioning)

A protocol that provides a way to remotely author and manage content using clients that support WebDAV. 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 Layout Editor

An administration application (page G-2) that is used to create the Library hierarchy, define reports, modify search result pages, and update the portal page.

web-viewable file

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

workflow

The process that routes a file for review and approval before it is released to the content server. Users are notified by e-mail when they have a file to review. There are three types of workflows: basic workflow (page G-4), criteria workflow (page G-6), and sub-workflow (page G-22).

Workflow Admin

An administration application (page G-2) that is used to set up and manage workflows.

work in progress

A revision that is in GenWWW status (page G-9) or Done status (page G-7).

write permission

The permission level that allows users to perform the following tasks within a particular security group:

– viewing content
– checking in content
– checking out content
– getting a copy of content.

See also read permission (page G-17), delete permission (page G-7), and admin permission (page G-2).

Appendix

A

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library
  version 1.2.3, July 18th, 2005

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