

Physical Content Manager User Guide
10g Release 3 (10.1.3.3.0)

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INTRODUCTION

OVERVIEW

This section contains the following topics:

- ❖ [About This Guide](#) (page 1-1)
- ❖ [Guide Conventions](#) (page 1-2)
- ❖ [Help Resources](#) (page 1-3)

ABOUT THIS GUIDE

This guide provides instructions on how to use the Physical Content Manager (PCM) application. It is intended mainly for those who need to check in and maintain physical items managed by Physical Content Manager (typically those with the predefined ‘pcmrequestor’ role or no PCM role at all). For information about tasks restricted to administrators and other users with increased privileges, see the *Physical Content Manager Administration Guide*.



Note: The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified.





This guide is built up as follows:

- ❖ Chapter 1 — [Introduction](#)
- ❖ Chapter 2 — [About Physical Content Manager](#)
- ❖ Chapter 3 — [Physical Content Manager User Interface](#)
- ❖ Chapter 4 — [Browsing the Storage Space](#)
- ❖ Chapter 7 — [Working With Reservations](#)
- ❖ Chapter 5 — [Working With Physical Content](#)
- ❖ Chapter 6 — [Searching for Physical Content](#)
- ❖ Chapter 8 — [Working With the Content Basket](#)

GUIDE CONVENTIONS

Symbols

The following symbols are used throughout this document:

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

Conventions

The following conventions are used throughout this document:

- ❖ The notation `[CS_Install_Dir]` is used to refer to the location on your system where a specific instance of Content Server is installed.

- ❖ Forward slashes (/) are used to separate parts of an Internet address. For example, <http://www.microsoft.com/windows2000/>. A forward slash might or might not appear at the end of an Internet address.
- ❖ Backward slashes (\) are used to separate the levels in a path to a server, directory, or file. For example, *C:\Directory*. This is true when referring to files on a Windows file system or on a UNIX system. A backward slash will always appear after the end of a server, directory, or file path.
- ❖ Paths to access operating system screens use the following formatting structure:
Start—Settings—Control Panel
- ❖ Required user input is distinguished using the following font formatting:
`xyz_name`



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

HELP RESOURCES

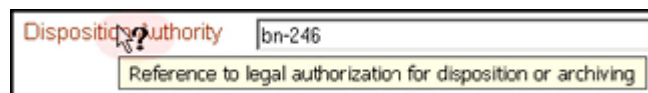
In addition to this guide, Physical Content Manager provides the following help resources for users:

- ❖ [Tooltips](#) (page 1-3)
- ❖ [Quick Help](#) (page 1-4)
- ❖ [Help Menu](#) (page 1-4)

Tooltips

If you hover the mouse cursor over a field label in your web browser, you can get context-sensitive information on the field label. A question mark is displayed, and then the tooltip appears.

Figure 1-1 Field label tooltip



If you are using Netscape, Mozilla, or Firefox as your web browser, you can view tooltips for items in options lists as well, provided the list items are not custom entries.

Figure 1-2 Option list item tooltip (only supported by Netscape, Mozilla, and Firefox browsers)



Quick Help

Click the **Quick Help** button where available on pages and screens to view context-sensitive help for that page or screen.

Help Menu

You can click the main menu Help link to open the online HTML help system for Content Server, which includes the Physical Content Manager help files. If you are logged in with user privileges, you will only see the end-user help system. To see the full administrator help system (including the user documentation), you need to be logged in as a system administrator.

ABOUT PHYSICAL CONTENT MANAGER

OVERVIEW

This section covers the following topics:

- ❖ [About Physical Content Manager](#) (page 2-1)
- ❖ [Physical Content Manager and Universal Records Management](#) (page 2-2)
- ❖ [Physical Content Manager and Content Server](#) (page 2-2)

ABOUT PHYSICAL CONTENT MANAGER

Physical Content Manager (PCM) is an optional feature of the Universal Records Management (URM) application. URM enables organizations to manage the retention and disposition of records and non-record content. Physical Content Manager provides the capability of managing physical records and non-record content that are not stored in the content server in electronic form. All items—both internal and external, regardless of their source or format—are managed in a single, consistent, manageable infrastructure using one central application and a single user interface. The same file plan and retention schedules are used for both electronic (internal) and physical (external) records and non-record content.

PHYSICAL CONTENT MANAGER AND UNIVERSAL RECORDS MANAGEMENT

Physical Content Manager (PCM) is an optional feature of Universal Records Management (URM), and as such has the same look-and-feel as URM. The Physical Content Manager software adds a number of new interface elements, and also modifies some existing Content Server and Records Manager pages. See [Chapter 3 \(Physical Content Manager User Interface\)](#) for further details.

Since Physical Content Manager is closely tied to URM, it shares most security features with it. As a result, some URM rights may be required to perform certain PCM tasks.

PHYSICAL CONTENT MANAGER AND CONTENT SERVER

Physical Content Manager runs within a Content Server instance (as part of Universal Records Management). It supports the following Content Server layouts and search templates (which users can set in their user profile):

- ❖ Supported layouts:
 - Trays
 - Top Menus
- ❖ Supported search templates:
 - Headline View
 - Thumbnail View



Note: Physical Content Manager does not support the Classic layout or the Classic View search template.



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

PHYSICAL CONTENT MANAGER USER INTERFACE

OVERVIEW

If Physical Content Manager (PCM) is installed correctly, the standard Content Server and Universal Records Management (URM) user interface are modified in a number of ways:

- ❖ [PCM Items in My Content Server](#) (page 3-1)
- ❖ [PCM Items in External Content](#) (page 3-2)
- ❖ [PCM Items in Browse Content](#) (page 3-3)



Note: This section describes the user interface for a normal PCM user (with the predefined ‘pcmrequestor’ role). If you have a different PCM role or have been given more PCM privileges, then the user interface may include additional options. For a discussion of the full PCM user interface, refer to the *Physical Content Manager Administration Guide*.

PCM ITEMS IN MY CONTENT SERVER

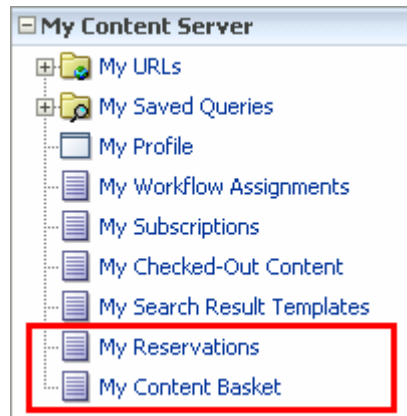
If Physical Content Manager is installed correctly, the My Content Server tray or top menu in the Content Server user interface includes the following new items:

- ❖ **My Reservations**
Choose this option to open a page which lists all items that you have currently reserved. See [Chapter 7 \(Working With Reservations\)](#) for further details.

❖ **My Content Basket**

Choose this option to open a page which lists all items that are currently in your content basket. See [Chapter 8 \(Working With the Content Basket\)](#) for further details.

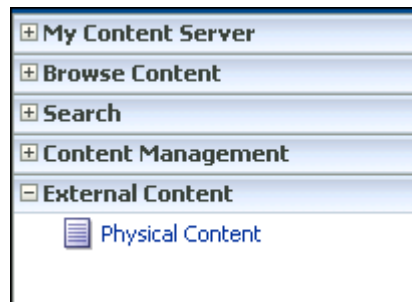
Figure 3-1 PCM-related items in My Content Server tray



PCM ITEMS IN EXTERNAL CONTENT

If Physical Content Manager is installed correctly, there is an **External Content** tray or top menu item in Content Server's user interface, which contains an item called **Physical Content**.

Figure 3-2 Physical Content item in External Content tray (for 'pcmrequestor' role)



If you click **Physical Content** in the External Content tray, the [Basic Search Page](#) (page 6-2) is displayed, where you can search for physical content and also perform a number of other tasks related to physical content (using the menu on that page).



Note: Depending on your assigned rights, the External Content tray or top menu may include additional options. For a discussion of the full PCM user interface, refer to the *Physical Content Manager Administration Guide*.

PCM ITEMS IN BROWSE CONTENT

If Physical Content Manager is installed correctly, an item called **Browse Storage** has been added to the Browse Content tray or top menu item in Content Server's user interface.

Figure 3-3 Browse Content item in Browse Content tray



If you click **Browse Storage** in the Browse Content tray, the [exploring page](#) at the highest level in the storage space hierarchy is displayed (see page 4-9), where you can browse through the defined storage hierarchy and view the properties of the storage locations contained in it.

BROWSING THE STORAGE SPACE

OVERVIEW

This section deals with browsing the defined storage environment in Physical Content Manager. It covers the following topics:

Concepts

- ❖ [About Storage Space](#) (page 4-2)
- ❖ [Storage Location Properties](#) (page 4-3)

Interface

- ❖ [Browse Storage Tree](#) (page 4-7)
- ❖ [Exploring “\[Location\]” Pages](#) (page 4-9)
- ❖ [Physical Items Pages](#) (page 4-13)
- ❖ [Storage Information Page](#) (page 4-14)

Tasks

- ❖ [Viewing Information on a Storage Location](#) (page 4-15)
- ❖ [Viewing All Items in a Storage Location](#) (page 4-16)
- ❖ [Reserving a Storage Location](#) (page 4-16)

ABOUT STORAGE SPACE

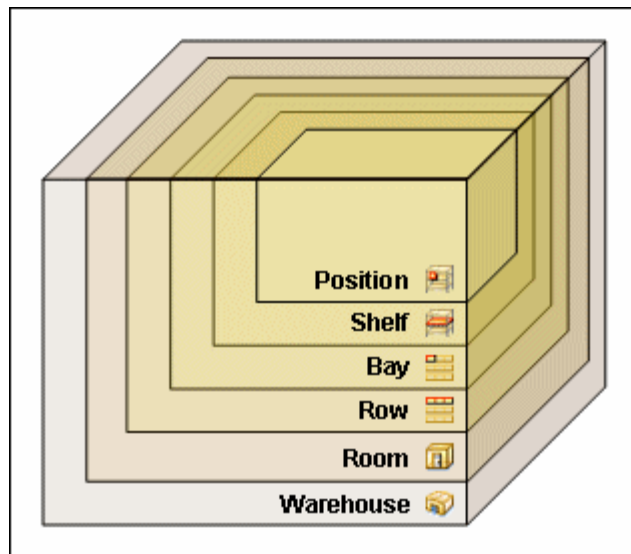
Your system administrator has set up a storage space environment for your organization, which defines the storage locations and their relationships. Physical Content Manager uses this defined space environment to keep track of the storage and retention of physical items. When [checking in](#) a physical item (see chapter 5), you assign that item to a storage location, so Physical Content Manager knows where it is stored and can keep track of it.

Storage Space Hierarchy

Storage space in Physical Content Manager is set up hierarchically—it describes storage locations which contain other, smaller storage locations which contain still smaller storage locations, etc., as illustrated in Figure 4-1 below. The out-of-the-box Physical Content Manager application comes with the following storage space hierarchy:

Warehouse (🏠) > Room (🏠) > Row (📊) > Bay (📊) > Shelf (📖) > Position (📖)

Figure 4-1 Default storage space hierarchy

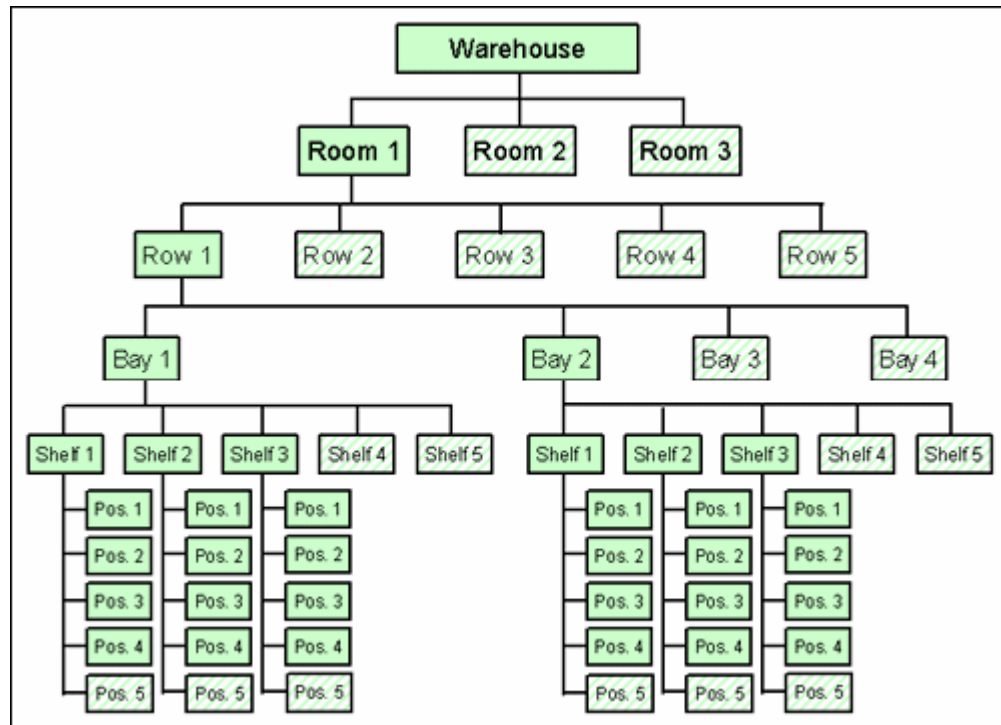


As shown in Figure 4-1 above, a warehouse consists of one or more rooms, a room consists of one or more rows, etc. The further down in the hierarchy, the more specific (and smaller) the storage locations become.



Note: The storage space environment that you are working with may have different hierarchical levels, depending on how the physical content management application has been set up for your organization.

Figure 4-1 Example storage space environment



Storage Space Tracking

Physical Content Manager keeps track of the use of space in the defined storage environment, and provides information about the available storage space on the [information page](#) of a storage location (see page 4-14). It will not allow you to store items in a location that does not have sufficient space.



Important: By default, the available storage space is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before.

STORAGE LOCATION PROPERTIES







Each storage location in the storage space environment has a number of properties, including:

- ❖ [Location Type](#) (page 4-4)
- ❖ [Object Type](#) (page 4-5)
- ❖ [Media Type](#) (page 4-5)
- ❖ [Storage Status](#) (page 4-7)

Location Type

Each storage location is assigned a location type, which helps specify where it is located in the storage space hierarchy. The available location types are defined by your system administrator.

The out-of-the-box Physical Content Manager application comes with the following six predefined location types (in hierarchical order), with their standard icons for the default Trays layout:

Predefined Location Types	Icon (large)	Allows Storage of Content (see note below)
Warehouse		No
Room		No
Row		No
Bay		No
Shelf		No
Position		Yes



Important: Whether a location type allows storage of content applies to that particular level only. For example, in the default hierarchy, shelves have a number of positions, each of which can hold content items, but no content items can be directly assigned to the shelf level (only to the positions on a shelf). This means that the location type ‘Shelf’ cannot store content, whereas the type ‘Position’ can.

Object Type

The object type of a storage location in the storage space environment specifies what type of items that storage location can hold.

The out-of-the-box Physical Content Manager application comes with the following predefined object types:

- ❖ All [*i.e., any of the defined object types, both predefined and custom*]
- ❖ Box
- ❖ Document
- ❖ Folder
- ❖ Micro
- ❖ Optical
- ❖ Tape

Your system administrator may also have set up a different list of object types to meet the needs of your organization. When creating a new physical item, you select its object type on the [Create Physical Item page](#) (see page 5-2).

Media Type

The media type of a storage location in the storage space environment provides a further specification of the type of items that storage location can hold.

The out-of-the-box Physical Content Manager application comes with a number of predefined media types, but your system administrator may also have set up a different list of media types to meet the needs of your organization.

The available media types depend on the selected [object type](#) of the current storage location. The table below explains which predefined media types can be selected for each predefined [object type](#):

This object type...	Supports these media types
Box	Box
Document	Mixed Fax Paper Photo

This object type...	Supports these media types
Folder	Folder
Micro	Mixed Microfiche Microfilm
Optical	Mixed CD Disc DVD
Tape	Mixed Audio Data Visual
All	Mixed Audio Box CD Data Disc Dvd Fax Folder Microfiche Microfilm Paper Photo Visual

Storage Status

If a storage location in the storage space can hold content items, its status determines whether content can be stored in the unit, and if not, why not. The status of a storage location is shown in the status column on the [Exploring “\[Location\]” pages](#) (see page 4-9), and can be any of the following:

❖ **Available**

Content can be stored in the storage location, and space is available. This is the default—in other words, if no status is provided, this one is assumed.

❖ **Reserved**

No content can be stored in the storage location or any of its child storage locations because it has been reserved by the system administrator. There may be space available in the storage location, but it has been set aside for future storage of physical items (for example, to ensure grouped storage of batches of items as they come in to be stored).

❖ **Occupied**

The storage location has reached its maximum storage capacity, and no further content can be added to it.

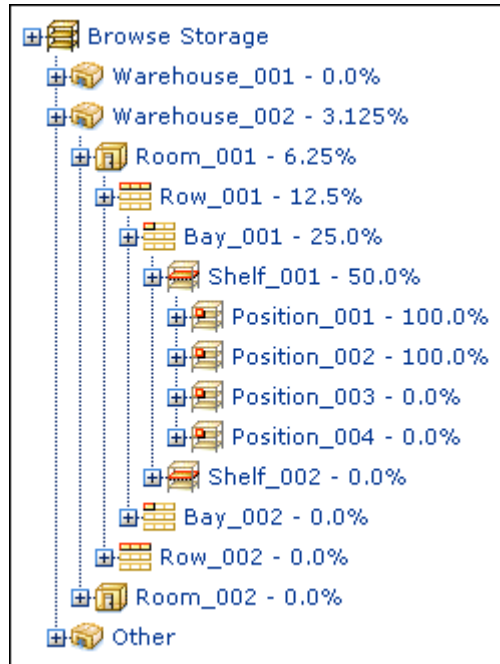


Note: Your system administrator may have blocked a storage location—that is, prevented storage of content in that storage location, even if there is space available. If that is the case, the status column on the [Exploring “\[Location\]” pages](#) (see page 4-9) is empty.

BROWSE STORAGE TREE

The Browse Content tray contains an item called **Browse Storage**. This option enables you to browse the defined storage space environment in a tree view with all defined storage locations in their hierarchical order:

Figure 4-2 Browse Storage node in External Content tray



Please note the following:

- ❖ The Browse Storage tree is not available in the Top Menus layout.
- ❖ The icons indicate the [location type](#) of the storage locations (see page 4-4).
- ❖ All storage locations include a percentage which shows how much of the available storage space in the location (and all its children) is currently occupied. For example, 25% means that one quarter of the maximum allowed number of stored items is currently assigned to the storage location (and all its children). The percentage of a storage location is automatically updated as soon as you add or remove physical items in that storage location. However, the percentages of the parent storage location(s) are not updated automatically. This is done automatically once a day (see next note).
- ❖ By default, the available storage space for the entire hierarchy is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before.
- ❖ If you drill down deep enough in the hierarchy, you can also see the items contained in a storage location.

- ❖ The Browse Storage tree will always include a storage location called “Other” at the bottom. This is the default storage location for any physical items that were not explicitly assigned to another storage location.
- ❖ If you click on any hyperlinked item in the storage space tree, its [exploring page](#) is opened (see below).

EXPLORING “[Location]” PAGES

The Exploring “[Location]” pages show the child storage location of a defined storage location. You can also display a list of all [physical items](#) stored in it (see page 4-13).

To access this page, complete the following steps:

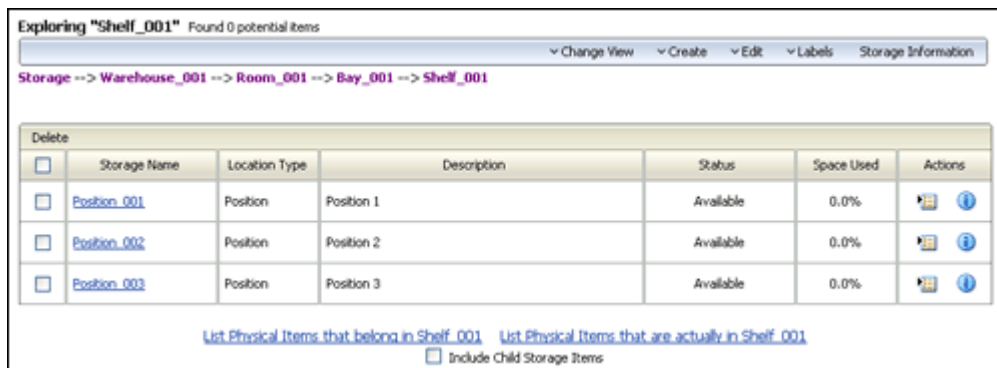
1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.
4. The Exploring page for the top level (called “Storage”) is displayed. You can use the links on this page to drill down in the storage space hierarchy to the page whose Exploring page you want to see. In the default Trays layout, you can also navigate to a storage location in the [tree view](#) (see page 4-7) and click its hyperlink in the tree.

Figure 4-3 Exploring “[Location]” page (at top level in storage space hierarchy)

The screenshot shows the 'Exploring "Storage"' page with the following table:

Exploring "Storage" Found 0 potential items						
Change View Labels Storage Information Create Storage Item						
Storage						
Delete						
<input type="checkbox"/>	Storage Name	Location Type	Description	Status	Space Used	Actions
<input type="checkbox"/>	MainWare	Warehouse	Main Warehouse	Available		
<input type="checkbox"/>	Warehouse_001	Warehouse	Warehouse 1	Available	0.0%	
<input type="checkbox"/>	Other	Misc Storage	Location for unassigned items			

Figure 4-4 Exploring “[Location]” page (at bottom level in storage space hierarchy)



Breadcrumb Trail

At the top of the page there is a “breadcrumb trail,” which shows you where you are in the storage space hierarchy. This trail enables you to easily navigate between the levels in the hierarchy. You can click on any hyperlinked item in the trail to go to that level and show its Exploring page.

Figure 4-5 Breadcrumb trail on Exploring page



Physical Item Links

Depending on where you are in the storage hierarchy and your assigned rights, the exploring page may contain links to the physical items currently assigned to the location. There are two links, each of which link to [physical item pages](#) (see page 4-13):




- ❖ **List Physical Items that belong in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *permanent* location.
- ❖ **List Physical Items that are actually in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *current* location. This list does not include any items that would normally be in the storage location, but that are currently checked out.

If you want the list to include all physical items in the child locations of the current storage location, then select the **Include Child Storage Items** check box before clicking the link.

Page Features

The table below describes the various features of the Exploring “[Location]” pages.


Feature	Description
Selection check boxes	These enable you to select one or more items in the list. To select all items, select the check box in the column header.
Storage Name	This is the name of the storage location. If you click on the link, a new Exploring page is displayed which lists the storage locations contained in the selected storage location. This enables you to move down to the lower levels of the storage space hierarchy.
Location Type	This specifies the type of the storage location. For more details about location types, refer to page 4-4. The available location types are defined by your system administrator.
Description	This is the description of the storage location, as specified when the location was defined.
Status	This specifies the current status of the storage location. For more details about the storage status, refer to page 4-7. A status is displayed only for storage locations that can hold content items. If a storage location cannot hold content (at that level), the status column is empty.
Space Used	This shows the occupancy percentage of the storage location and all its children. For example, 25% means that one quarter of the maximum allowed number of items that can be stored in the storage location (and all its children) is currently assigned to that location. This percentage is automatically updated as soon as you add or remove physical items in the storage location. However, the percentages of the parent storage locations are not updated automatically. By default, these percentages are recalculated once a day at midnight (unless your system administrator has set up the system differently).

Feature	Description
Actions menu icon ()	<p>If you click on this icon, a popup menu is displayed. The available menu options depend on the storage location in the row, and may include:</p> <ul style="list-style-type: none"> ❖ Storage Information—Choose this option to display the Storage Information page (see page 4-14). ❖ Reserve Storage—Choose this option to reserve the storage location for future storage of physical items (see page 4-16). ❖ Cancel Request—Choose this option to cancel the reserved status of the storage location. ❖ Create Physical Item—Choose this option to add a new physical content item to the selected storage location. This option is available only for storage locations that allow content to be stored in them (for example, storage locations of type “Position”). <p> Note: If you were assigned additional rights, the actions popup menu may include other options. For details on these options, refer to <i>Physical Content Manager Administration Guide</i>.</p>
Info icon ()	<p>If you click on this icon, the Storage Information page (see page 4-14) is displayed.</p>

Menu Bar

There is a menu bar at the top of the page with the following options (depending on your assigned rights):

- ❖ **Storage Information**—Choose this option to display the [Storage Information Page](#) (page 4-14) for the current storage location.
- ❖ **Change View**—This opens a submenu with the following options:
 - **Thumbnail View**—Choose this option to display the page in thumbnail view.
 - **Headline View**—Choose this option to display the page in headline view.

 **Note:** If you were assigned additional rights, the menu bar may include other options. For details on these options, refer to *Physical Content Manager Administration Guide*.

PHYSICAL ITEMS PAGES

This page lists all physical items contained in a storage location (and its child locations, if desired). It is essentially a [search results page](#) to a query (see page 6-7). You access this page by clicking either of the following links on any of the [Exploring pages](#) (see page 4-9).

- ❖ **List Physical Items that belong in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *permanent* location.
- ❖ **List Physical Items that are actually in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *current* location. This list does not include any items that would normally be in the storage location, but that are currently checked out.

If you want the list to include all physical items in the child locations of the current storage location, then select the **Include Child Storage Items** check box before clicking the link.

Figure 4-6 List Physical Items links on Exploring page

Storage Name	Location Type	Description	Status
Position 1	Position	Position 1	Available
List Physical Items that belong in Room2 List Physical Items that are actually in Room2 <input type="checkbox"/> Include Child Storage Items			

Figure 4-7 List of the physical items in a storage location

Found 2 potential items				
Freeze Results Change View				
Freeze	Trigger Dates	Request	Content Basket	
<input type="checkbox"/> Select All	Name	Date	Author	Actions
<input type="checkbox"/>	item1	3/21/07	sysadmin	
<input type="checkbox"/>	item2	3/21/07	sysadmin	

See [Search Results Page](#) (page 6-7) for a description of the features on this page.

STORAGE INFORMATION PAGE

Use the Storage Information page to view information about an existing storage location. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

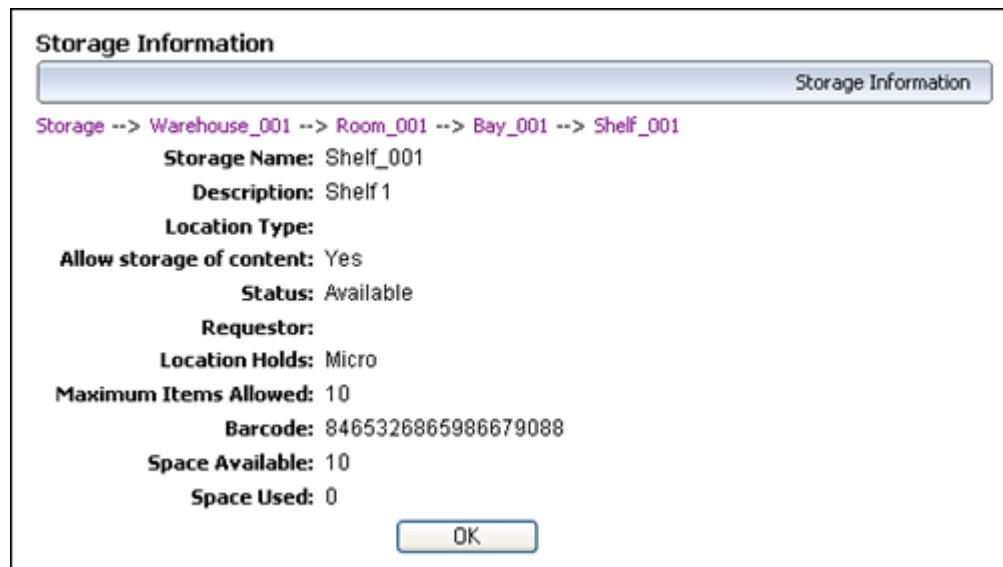
The [Exploring “\[Location\]” page](#) (see page 4-9) for the top level of the storage hierarchy is displayed.

4. Navigate to the storage location whose properties you want to view, and click on the info icon (i). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu (☰) for a storage location in the list to edit that location’s properties.

Figure 4-8 Storage Information page



This page shows the current properties of the selected storage location, including the total available spaces (calculated from all child storage locations) and the spaces currently used.



Important: By default, the available storage space is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. Your system administrator may force a recalculation of the storage space availability at any time.




Note: Whether a storage location allows storage of content depends on its assigned [location type](#) (see page 4-4) and applies to that particular level only. For example, in the default hierarchy, shelves have a number of positions, each of which can hold content items, but no content items can be directly assigned to the shelf level (only to the positions on a shelf). This means that the location type ‘Shelf’ cannot store content, whereas the type ‘Position’ can.

VIEWING INFORMATION ON A STORAGE LOCATION


To view information about a storage location, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 4-9) for the top level of the storage hierarchy is displayed.

4. Navigate to the storage location whose properties you want to view, and click on the info icon (). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu () for a storage location in the list to edit that location’s properties.

The [Storage Information page](#) (page 4-14) is displayed listing the current storage location properties.

5. Click **OK** when you are done.

The [Exploring “\[Location\]” page](#) (see page 4-9) that you started from is displayed again.

VIEWING ALL ITEMS IN A STORAGE LOCATION

To view all items currently contained in a storage location, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 4-9) for the top level of the storage hierarchy is displayed.

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 4-9)—that includes the storage location whose items you want to view.
5. At the bottom of the page, click either of the following links:
 - **List Physical Items that belong in [Location]**—This lists all items that have the specified storage location as their *permanent* location.
 - **List Physical Items that are actually in [Location]**—This lists all items that have the specified storage location as their *current* location.

If you want the list to also show all items in the child locations of the current storage location, make sure that you select the **Include Child Storage Items** check box. This check box is available only if the current storage location has any child locations.

The [Physical Items Pages](#) (page 4-13) is displayed.

RESERVING A STORAGE LOCATION


Use this procedure to reserve a storage location for future storage of physical items. This may be useful if you have groups of similar items that you want to store together as they come in for storage. If you reserve a storage location, all its child locations are also reserved.

Reserving a Storage Location

To reserve a storage location, complete the following steps:





1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 4-9) for the top level of the storage hierarchy is displayed.

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 4-9)—that includes the storage location that you want to reserve.
5. Choose **Reserve Storage** on the actions icon menu () for the storage location.

The [Exploring “\[Location\]” page](#) (see page 4-9) that you started from is displayed again, and the storage location now shows “Reserved” in its status column, with the name of the user who made the reservation in parentheses:

Figure 4-9 Reserved status of storage location


Available	0.0%	 
Reserved (sysadmin)	0.0%	 

Canceling the Reservation of a Storage Location

To cancel the reserved status of a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 4-9) for the top level of the storage hierarchy is displayed.

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 4-9)—that includes the storage location whose reserved status you want to cancel.
5. Choose **Cancel Request** on the actions icon menu () for the storage location.

The [Exploring “\[Location\]” page](#) (see page 4-9) that you started from is displayed again, and the storage location no longer shows “Reserved” in its status column.

WORKING WITH PHYSICAL CONTENT

OVERVIEW

This section deals with creating and managing physical items with the Physical Content Manager application. It covers the following topics:

Concepts

- ❖ [About Physical \(External\) Content](#) (page 5-2)

Interface

- ❖ [Create/Edit Physical Item Page](#) (page 5-2)
- ❖ [Select Storage Location Dialog](#) (page 5-9)
- ❖ [Physical Item Information Page](#) (page 5-10)

Tasks

- ❖ [Creating a Physical Item as a Record](#) (page 5-13)
- ❖ [Creating a Physical Item as Non-Record Content](#) (page 5-15)
- ❖ [Creating a Physical Item Within Another Item](#) (page 5-19)
- ❖ [Editing a Physical Item](#) (page 5-20)
- ❖ [Adding Physical Items To Your Content Basket](#) (page 5-21)

- ❖ [Viewing Reservations for a Physical Item](#) (page 5-22)
- ❖ [Reviewing a Physical Item](#) (page 5-22)



Note: For further details about checking in records and non-record content, refer to the *Records Manager User Guide*.

See also:

- [Chapter 6 \(Searching for Physical Content\)](#)
- [Chapter 7 \(Working With Reservations\)](#)

ABOUT PHYSICAL (EXTERNAL) CONTENT

As opposed to internal, electronic content managed by the Oracle suite of content management products, no copy of external, physical content is stored in the content server. Only its metadata (including storage information and retention schedule, if any) is stored. When you “check in” a physical content item, you provide its basic metadata information and you specify where the item is stored by selecting a location in the defined [storage space hierarchy](#) (see chapter 4). If you have the appropriate privileges, you can also assign a retention schedule to the item, which determines its life cycle.



Note: You can [create physical items within other physical items](#) (see page 5-19). This may be useful in situations where you want to create a “container” physical item (for example, of object type “Box”) and add a number of “content” physical items within it (for example, of object type “Folder”).

CREATE/EDIT PHYSICAL ITEM PAGE

Create Physical Item Page

Use the Create Physical Item page to “check in” a new physical content item—that is, provide its metadata, storage information, and retention schedule (if any) to Physical Content Manager. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [Basic Search Page](#) (page 6-2) is displayed.

4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.


Figure 5-1 Create Physical Item page

Create Physical Item


* Name	<input type="text"/>	
Title	<input type="text"/>	
* Author	<input type="text" value="sysadmin"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="sysadmin"/>
* Security Group	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Public"/>	
Object Type	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>	
Media Type	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>	
Current Location	<input type="text"/>	<input type="button" value="Browse..."/>
Current location comments	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
Permanent Location	<input type="text"/>	<input type="button" value="Browse..."/>
Barcode Label	<input type="text"/>	
* Type	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="ADACCT - Acme Accounting Department"/>	
	<input type="checkbox"/> Is Record	
Record Activation Date	<input type="text"/>	<input type="button" value="Calendar"/>
Record Expiration Date	<input type="text"/>	<input type="button" value="Calendar"/>
Originating Organization	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Default"/>	
Record Format	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Text"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Text"/>
Supplemental Markings	<input type="text"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>
	<input type="checkbox"/> Subject To Audit	
Audit	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>	
	<input type="checkbox"/> Subject to Review	
Reviewer	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>
Review Period	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text"/>
* Category or Folders	<input type="button" value="Browse..."/>	
Archive Supervisor	<input type="text"/>	
Date First Stored	<input type="text" value="0000"/>	<input type="button" value="Calendar"/>
Additional Storage Date	<input type="text"/>	<input type="button" value="Calendar"/>

Edit Physical Item Page

Use the Edit Physical Item page to modify the properties of an existing physical content item. To access this page, complete the following steps:




1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to edit. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Edit External Item** option in the action popup menu () of the physical item that you want to edit.





Note: You can also open the item's content information page () and choose **Edit > Edit External Item**.



Page Features

The table below describes the various features of the Create Physical Item and Edit Physical Item pages.

Feature	Description
Name	<p>Enter a unique name for the physical item. This field is view-only on the Edit Physical Item page.</p> <ul style="list-style-type: none"> ❖ Required ❖ Maximum number of characters: 30 <p> Note: It is recommended that you avoid accented letters and any other characters than a-z, A-Z, and 0-9 in the names of physical items.</p> <p> Note: Depending on the database used on the content server, the name of a physical item may automatically be converted to all upper case, even if you entered it in lower case.</p> <p> Note: Your system administrator may have set up the system so that the name of a physical item is generated automatically. If that is the case, the Name field is not displayed on the Create Physical Item page. It is displayed on the Edit Physical Item page, but you cannot modify it..</p>

Feature	Description
Title	Specify a descriptive title for the physical item. <ul style="list-style-type: none"> ❖ Required ❖ Maximum number of characters: 80
Filer	Specify the person who submitted the physical item. The default is the user that is currently logged in. If you have administrative permission, you can select an alternative filer in the dropdown list of available users. <ul style="list-style-type: none"> ❖ Required.
Security Group	Select the security group that the physical item should be assigned to. Security groups are sets of files with the same access permissions. <ul style="list-style-type: none"> ❖ Default: Public ❖ Required.
Object Type	Select the type of the physical item. The available object types are defined by the system administrator (see page 4-5). <p> Note: You do not need to select an object type for a physical item. However, if you do, you should select a type that matches the object type of the storage location that you assign the item to (if one was specified for the location). Otherwise an error message is displayed and you cannot check in the physical item.</p>
Media Type	Select the type of information carrier of the physical content item. The available media types are defined by the system administrator, and also depend on the selected object type (see page 4-5).

Feature	Description
Current Location	<p>Specify the current location of the physical item.</p> <p>You can manually enter a location, but it is much easier to click the Browse button and open the Select Storage Location dialog, where you can drill down the storage space hierarchy and select the location.</p> <p>After you have selected a location, the Current Location field contains a reference to that location. This will either be the barcode specifically provided for that location on its definition page, or, if none is specified, a 19-digit number. Below the Current Location field, you can see the full hierarchical storage path to the selected location.</p> <p>If you do not provide a current location, it is automatically set to “OTHER” (i.e., assigned to the ‘Other’ storage location).</p> <p> Note: On the Edit Physical Item page, you cannot modify the current location of a physical item unless you have been granted special privileges.</p>
Current Location Comments	<p>If required, enter a comment about the current location (for example, handling instructions or the reason the content item is there).</p>

Feature	Description
Permanent Location	<p>Specify the permanent storage location of the physical item. This is the location that is permanently assigned to the content item, which may be temporarily moved to a different location (for example, due to a reservation). In that case, its current location is updated.</p> <p>You can manually enter a location, but it is much easier to click the Browse button and open the Select Storage Location dialog, where you can drill down the storage space hierarchy and select the location.</p> <p>After you have selected a location, the Permanent Location field contains a reference to that location. This will either be the barcode specifically provided for that location on its definition page, or, if none is specified, a 19-digit number. Below the Permanent Location field, you can see the full hierarchical storage path to the selected location.</p> <p>If you do not provide a permanent location, it is automatically set to match the current location.</p> <p> Note: On the Edit Physical Item page, you cannot modify the permanent location of a physical item unless you have been granted special privileges.</p>
Barcode Label	<p>Specify the label used for the barcode for the physical item (i.e., the text printed below the barcode on the item label).</p> <p>If you do not provide a barcode label, it is automatically set to match the specified item name (in all upper-case letters, with spaces stripped).</p> <p> Note: If the content server is set up to auto-generate content IDs (in the System Properties utility), then the barcode matches the automatically generated name (typically a number, possibly preceded by a prefix; for example, ID_002319).</p>
Type	<p>Select the content type from the dropdown menu, which lists all defined content types in the content server.</p>

Feature	Description
Is Record	<p>If you select this check box, the external, physical content item is considered a record, and a number of records-related metadata fields are added to the page.</p> <p>You <i>must</i> attach a life cycle to the physical item if you designate it as a record.</p> <p>For more information about checking in records, refer to the <i>Records Manager User Guide</i>.</p>
Record Activation Date, Record Expiration Date, originating Organization, Record Format, Supplemental Markings Subject To Audit, Audit, Reviewer Review Period	<p>These fields are specific to Records Manager. See the <i>Records Manager User Guide</i> for further details.</p>
Create button (Create page only)	<p>Click this button to check in the information about the physical item into the content server.</p>
Submit Update button (Edit page only)	<p>Click this button to submit the updated definition of the physical item.</p>
Reset button	<p>If you are creating a new physical item, clicking this button resets the page to its initial default settings. If you are editing an existing physical item, this returns the original content item settings before you made any modifications.</p>
Quick Help button	<p>Click this button to display context-sensitive help information about this page.</p>

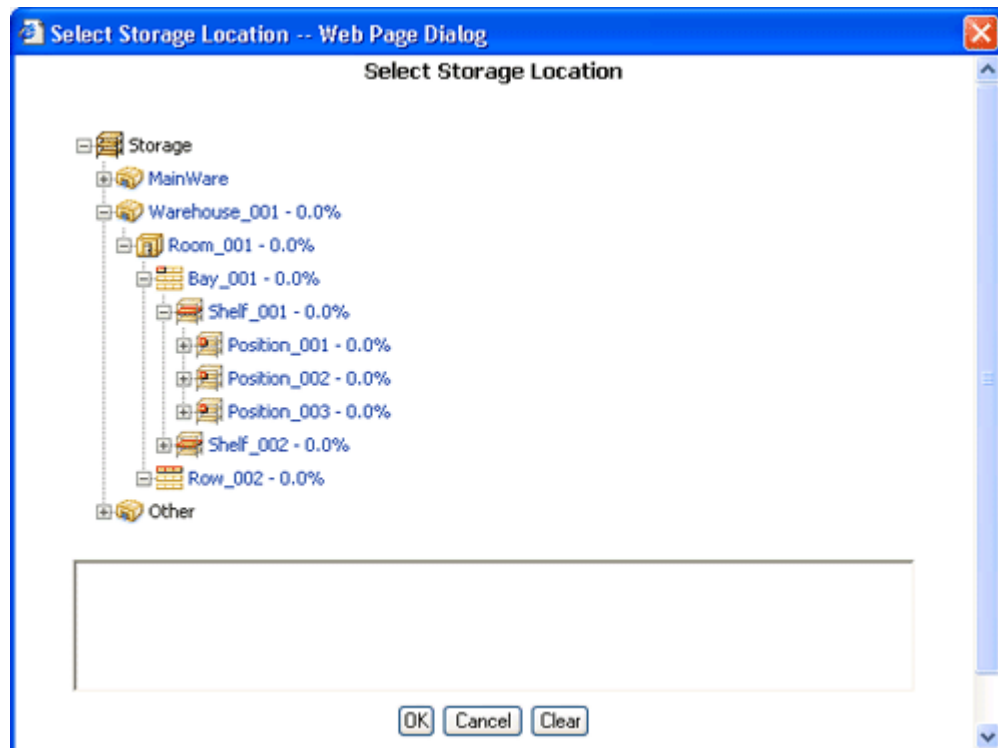


Note: If you entered this page through the retention schedules in Records Manager, then the top of the page will include the full retention schedule path

SELECT STORAGE LOCATION DIALOG

Use the Select Storage Location dialog to select the storage location of a physical content item. To access this dialog, click the Browse button next to either of the location fields on the [Create Physical Item page](#) or [Edit Physical Item page](#) (see page 5-2).

Figure 5-2 Select Storage Location dialog



The main box at the top shows the defined storage space hierarchy. You can drill down the hierarchy to navigate to the location where the physical item is stored. If you select a location in the hierarchy, the box at the bottom shows the full navigation path to the selected location.

You can use the plus and minus icons in front of a storage location to unfold or collapse all its child locations.

You can only select storage locations that allow storage of items in them (by default, only the locations of type “Position”). All selectable locations are visually marked as hyperlinks.

When you have selected the desired location, click **OK** to return to the [Create Physical Item page](#) or [Edit Physical Item page](#) (see page 5-2). You can click **Clear** to delete the current storage path and select a new one.

PHYSICAL ITEM INFORMATION PAGE

Use the Physical Item Information page to view information about an existing physical item. To access this page, complete the following steps:



1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to view. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, click on the info icon () for the item whose information you want to view. Alternatively, you can also choose **Information > External Item Information** from the actions popup menu ().

Figure 5-3 Physical Item Information page

Physical Item Information	
▼ Information	▼ Edit
Create Physical Item Within	Delete External Item
Print Label	
Name:	PhysicsUnit_001
Title:	Physics Classroom Equipment
Author:	sysadmin
Security Group:	
Object Type:	All
Media Type:	MIME1
Current Location:	5150E65260531402653 Storage->Warehouse_01-->Room_001-->Bay_001-->Shelf_001-->Position_001
Permanent Location:	51511F6b264531442653 Storage->Warehouse_001-->Room_001-->Bay_001-->Shelf_001-->Position_001
Barcode Label:	PHY3 CALUNIT001
Type:	
Is Record:	No
Category ID:	
Folder ID:	
Delete Approve Date:	
Is Cutoff:	No
Record Filing Date:	2/27/07 4:41 PM
Originating Organization:	Default
Record Format:	Text
Supplemental Markings:	
Subject To Audit:	No
Audit:	
Is Frozen:	No
Subject In Review:	No
Reviewer:	
Review Period:	
Record Destroy Date:	
Related Content	
Revisions	
Supersedes	
Supporting Content	
Supported Content By	
Cross-References	
Cross-Referenced By	

This page shows the current properties of the physical item, including its basic metadata (name, title, filer, and security group), its freeze status, its object and media types, its storage location, and barcode label.

Please note the following:

- ❖ Your system administrator may have set up the system so that the name of a physical item is generated automatically. That means that you cannot provide a name when you [create](#) the physical item (see page 5-2). If the name was generated automatically, it will typically be a number, possibly preceded by a prefix (for example, ID_002319).
- ❖ If the physical item has been assigned a life cycle (i.e., retention schedule and disposition rules), then the information page also includes a Retention Schedule Information section, which provides disposition processing and security information for the item. For more information, refer to the *Records Manager User Guide*.
- ❖ If the physical item is currently [checked out](#) (see chapter 7), its current location is set to the value of the deliver-to location as specified when the associated reservation request was [created](#) (see page 7-5). If no location was provided, the current location is set to “OTHER.”
Also, if a location comment was specified for the associated reservation request, then the Current Location Comments field will show this comment. Otherwise it contains the login name of the user who created the reservation request.
- ❖ If the physical item is [contained within](#) another physical item (see page 5-19), the current location and/or permanent location field includes a **Container Details** link, which opens the information page of the parent physical item (the “container”).

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This may include the following options (depending on the item status and your assigned privileges):

- ❖ **Information > List Physical Items that belong here**—Choose this option to view a list of all physical items whose *permanent* location is assigned to the current physical item. This is useful only for physical items that have other physical items [contained in them](#) (see page 5-19).
- ❖ **Information > List Physical Items that are actually here**—Choose this option to view a list of all physical items whose *actual* location is assigned to the current physical item. This is useful only for physical items that have other physical items [contained in them](#) (see page 5-19). The list does not include any items that would normally be in the storage location, but that are currently checked out.
- ❖ **Information > View Reservations**—Choose this option to [view the reservations](#) for the current physical item (see page 5-22).

- ❖ **Edit > Edit External Item**—Choose this option to [edit](#) the properties of the current physical item (see page 5-20).
- ❖ **Create Physical Item Within**—Choose this option to [create](#) a new physical item within the current physical item (see page 5-19).



Note: If you were assigned additional rights, the menu bar may include other options. For details on these options, refer to *Physical Content Manager Administration Guide*.

CREATING A PHYSICAL ITEM AS A RECORD

When creating a new physical item as a record, you check its metadata, storage information, and retention schedule into the content server. This information is subsequently used to track the physical item and manage its life cycle.

There are two ways to create physical items as records:

- ❖ [On the Create Physical Item page in Physical Content Manager](#) (page 5-13)
- ❖ [Within the retention schedules of Records Manager](#) (page 5-14)

See also:

- [Creating a Physical Item as Non-Record Content](#) (page 5-15)
- [Creating a Physical Item Within Another Item](#) (page 5-19)

Using the Create Physical Item Page In Physical Content Manager

Use this procedure to create a new physical item as a record using the [Create Physical Item page](#) in Physical Content Manager.



Note: You can create records only if you have been granted the appropriate privileges. If in doubt, please contact your system administrator.

To create the new physical item as a record, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [Basic Search Page](#) (page 6-2) is displayed.

4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.

The [Create Physical Item page](#) (page 5-2) is displayed.

5. Select the **Is Record** check box.

A number of record-related fields are added to the Create Physical Item page.

6. Provide the information for the new physical item as required, including its storage and record-related information. Do not forget to assign a retention category or records folder to the physical item in order to set its retention schedule.



Note: For more information about the record-specific fields, refer to the *Records Manager User Guide*.

7. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10).

Within the Retention Schedules of Records Manager

Use this procedure to create a new physical item as a record within the retention schedules hierarchy in Records Manager. You do this by placing the item directly into a retention category or records folder.



Note: You can create records only if you have been granted the appropriate privileges. If in doubt, please contact your system administrator.

To create the new physical item as a record, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Retention Schedules**.
4. Navigate to the records retention category or records folder in the hierarchy where you want to add the physical item, either using the exploring pages or, in the Trays layout, using the tree view on the left.

5. On the menu bar of the exploring page of the category or folder, choose **Create > Create Physical Record**.

The [Create Physical Item page](#) (page 5-2) is displayed, with the full retention schedule path to the current retention category at the top of the page.

Figure 5-4 Full retention schedule path on Create Physical Item page

The screenshot shows the 'Create Physical Item' page. At the top, the retention schedule path is displayed as 'Retention Schedules --> Series 1 --> Category 1'. Below this, there are several form fields:

- * Name: A text input field.
- Title: A text input field.
- * Author: Two text input fields, both containing 'sysadmin'.
- * Security Group: A dropdown menu with 'RecordsGroup' selected.



Note: For more information about the record-specific fields, refer to the *Records Manager User Guide*.

6. Provide the information for the new physical item as required.



Note: The page does not contain the Life Cycle field as the physical item is automatically assigned the retention and disposition rules of the current (or inherited) retention category.

7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10). Please note that the **Is Record** field is set to “Yes.”

CREATING A PHYSICAL ITEM AS NON-RECORD CONTENT

When creating a new physical item as non-record content, you check its metadata, storage information, and retention schedule (if any) into the content server. This information is subsequently used to track the physical item and manage its life cycle.

There are three ways to create physical items as non-record content:

- ❖ [On the Create Physical Item page in Physical Content Manager](#) (page 5-16)
- ❖ [Within the storage space hierarchy in Physical Content Manager](#) (page 5-17)
- ❖ [Within the retention schedules of Records Manager](#) (page 5-18)

See also:

- [Creating a Physical Item as a Record](#) (page 5-13)
- [Creating a Physical Item Within Another Item](#) (page 5-19)

Using the Create Physical Item Page In Physical Content Manager

Use this procedure to create a new physical, non-record item using the [Create Physical Item page](#) in Physical Content Manager.

To create the new physical, non-record item, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [Basic Search Page](#) (page 6-2) is displayed.

4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.

The [Create Physical Item page](#) (page 5-2) is displayed.

5. Provide the information for the new physical item as required, including its storage information.



Note: If you have the appropriate privileges, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

6. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10).

Within the Storage Space Hierarchy in Physical Content Manager

Use this procedure to create a new physical, non-record item within the [storage space hierarchy](#) in Physical Content Manager. You do this by placing the item directly into a storage location.

To create the new physical, non-record item, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The Exploring page for the top level (called “Storage”) is displayed.

4. Navigate to the storage location where you want to add the new non-record physical item, either using the [exploring pages](#) or, in the Trays layout, using the [tree view](#) on the left.



Note: You can add items only to storage locations that can hold content.

5. In the menu bar on the exploring page of the storage location, choose **Create Physical Item**.



Note: If this option is not in the menu, the storage location has not been configured to store content.



Note: You can also add a physical item by choosing **Create Physical Item** in the actions icon menu (🔍) of a storage location.

The [Create Physical Item page](#) (page 5-2) is displayed, with the Current Location and Permanent Location fields already pointing to the current storage location.

Figure 5-5 Pre-filled Current Location and Permanent Location fields

Current Location	<input type="text" value="2779770392809020499"/>	<input type="button" value="Browse..."/>
	Storage-->Warehouse_001-->Room_001	
Current location comments	<input type="text"/>	
Permanent Location	<input type="text" value="2779770392809020499"/>	<input type="button" value="Browse..."/>
	Storage-->Warehouse_001-->Room_001	
Barcode Label	<input type="text"/>	
* Type	<input type="text" value="ADACCT - Acme Accounting Department"/>	

6. Provide the information for the new physical item as required.



Note: If you have the appropriate privileges, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10).

Within the Retention Schedules of Records Manager

Use this procedure to create a new physical, non-record item within the retention schedules hierarchy in Records Manager. You do this by placing the item directly into a retention category or records folder. This procedure is useful only if you want to assign a retention schedule to the physical item.



Note: You can perform the steps in this procedure only if you have been granted the appropriate privileges. If in doubt, please contact your system administrator.

To create a new physical, non-record item, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Retention Schedules**.
4. Navigate to the non-record retention category in the hierarchy where you want to add the physical item, either using the exploring pages or, in the Trays layout, using the tree view on the left.

5. On the menu bar of the exploring page of the category or folder, choose **Create > Check in New Physical Item**.

The [Create Physical Item page](#) (page 5-2) is displayed, with the full retention schedule path to the current non-record retention category at the top of the page.

Figure 5-6 Full retention schedules path on Create Physical Item page

The screenshot shows a web form titled "Create Physical Item". At the top, it displays the retention schedule path: "Retention Schedules --> Series 1 --> Category 1". Below this, there are four input fields:

- * Name: A text input field.
- Title: A text input field.
- * Author: A text input field containing "sysadmin" and a dropdown menu also showing "sysadmin".
- * Security Group: A dropdown menu showing "RecordsGroup".

6. Provide the information for the new physical item as required.



Note: The page does not contain the Life Cycle field as the physical item is automatically assigned the retention and disposition rules of the current retention category.


7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10). Please note that the **Is Record** field is set to “No.”

CREATING A PHYSICAL ITEM WITHIN ANOTHER ITEM

Use this procedure to create a new physical item within another, existing physical item. This may be useful in situations where you want to create a “container” physical item (for example, of [object type](#) “Box”) and add a number of “content” physical items within it (for example, of [object type](#) “Folder”).

To create the physical item within another item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item within which you want to create another physical item. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Create Physical Item Within** option in the item’s action popup menu (.



Note: You can also choose the Create Physical Item Within option on the [Physical Item Information page](#) (page 5-10).

The [Create Physical Item page](#) (page 5-2) is displayed.

4. Provide the information for the new physical item as required. The current and permanent location are already provided, pointing to the “parent” physical item in the storage hierarchy.

Note: If you have the Record.Create right in Records Manager, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

5. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 5-10).


See also:

- [Creating a Physical Item as a Record](#) (page 5-13)
- [Creating a Physical Item as Non-Record Content](#) (page 5-15)

EDITING A PHYSICAL ITEM

Use this procedure to edit the properties of an existing physical item.

To edit a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to edit. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Edit External Item** option in the item’s action popup menu (.



Note: You can also choose the Edit > Edit External Item on the [Physical Item Information page](#) (page 5-10).

The Edit Physical Item page is displayed.

4. Modify the physical item properties as required, and click **Submit Update** when you are done.



Note: You can modify the current and/or permanent location of a physical item only if you have been granted the appropriate privileges. If in doubt, please contact your system administrator.

The item's information page is displayed again, with the updated properties.

ADDING PHYSICAL ITEMS TO YOUR CONTENT BASKET

Use this procedure to add a physical item to your content basket. The content basket serves as a personal storage space where you can temporarily store multiple items for later processing. For example, if you want to [reserve](#) physical items for check-out, you search for all items that you want to reserve, and add each of them to your content basket. After adding all items, you can [open](#) your content basket and [make a reservation request](#) for the items in the basket.

Once an item is added to your content basket, you can access the content basket from the My Content Server tray or top menu.



Note: For further details on the content basket, refer to [Chapter 8 \(Working With the Content Basket\)](#).

To add a physical item to the content basket, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item that you want to add to your content basket. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, select the check box of each item that you want to add to your content basket.
4. Click **Content Basket** in the menu bar at the top of the page, and choose any of the following options depending on what you want to add to the content basket:
 - **Add Selected Items to Basket - Native**
 - **Add Selected Items to Basket - Web**
 - **Add All Items to Basket - Native**
 - **Add All Items to Basket - Web**



Note: The “All Items” options add all items *on the current page* to the content basket, which may not be all items in the complete search results. If you want to add all items in the complete search results list, you need to add them per page.

The Content Basket page is displayed, which lists all items currently in the content basket.


VIEWING RESERVATIONS FOR A PHYSICAL ITEM

Use this procedure to view all outstanding reservation requests for a physical item.



Note: For more information about reservations, refer to [Chapter 7 \(Working With Reservations\)](#).

To view the reservations of a physical item, complete the following steps:

1. Log into the content server.
2. **Search** for the physical item for which you want to see the current reservation requests. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Information > View Reservations** option in the item's action popup menu (.



Note: You can also choose the **Information > View Reservations** on the [Physical Item Information page](#) (page 5-10).

The [Reservation Search Results page](#) is displayed (see page 7-16), which lists all outstanding reservation request for the current physical item.


REVIEWING A PHYSICAL ITEM

A physical item may have been marked for periodic review when it was [created](#) (see page 5-2). If you were the person that was assigned to be the reviewer, you will receive an e-mail notification whenever a review of the item is due.

To perform a review of a physical item, complete the following steps:


1. Log into the content server.
2. Choose the **My Retention Assignments** option.
The My Approval List page is displayed.
3. Click **Pending Review—My Content and Records**.

You can also click the appropriate e-mail notification link to directly access the My Approval List page, which lists all items that are due for review.


 **Note:** The list contains both internal (electronic) and external (physical) items that are up for review.

4. Review the physical items in accordance with the procedures in your organization.


You can also use this alternative method:

1. [Search](#) for the physical item(s) that you want to mark as reviewed. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
- 2.
3. On the search results page, choose the **Mark Reviewed** option in the item's action popup menu ().

 **Note:** You can also choose the Mark Reviewed option on the [Physical Item Information page](#) (page 5-10).

 **Note:** This option is available only for items that were marked as “Subject to Review” when the item was [created](#) (see page 5-2).

4. You are prompted to enter a reason for the action. If desired, enter a reason, and click **OK** to confirm. If you do not want to enter a reason, leave the text box empty, and click **OK**. If you click **Cancel**, the entire action is aborted.

 **Note:** You can see the review history of an item by choosing **Information > Recent Reviews** in the menu bar on that item's information page. Please note that this menu may not be available, depending on your assigned rights.

SEARCHING FOR PHYSICAL CONTENT

OVERVIEW

This section explains how to find physical items managed by the Physical Content Manager application. It covers the following topics:

Concepts

- ❖ [About Searching for Physical Content](#) (page 6-2)

Interface

- ❖ [Basic Search Page](#) (page 6-2)
- ❖ [Advanced Search Page](#) (page 6-4)
- ❖ [Search Results Page](#) (page 6-7)

Tasks

- ❖ [Browsing to Physical Content](#) (page 6-9)
- ❖ [Searching for Physical Content](#) (page 6-9)

ABOUT SEARCHING FOR PHYSICAL CONTENT

Contrary to internal (electronic) content items managed by the Oracle suite of content management products, no copies of external, physical content items are typically stored in the content server. Only their metadata (including storage information and retention schedules, if any) are stored.

You can search for information about physical items managed by Physical Content Manager using the [basic search page](#) (see below) or the [advanced search page](#) (see page xx).



Note: You can also find physical content items by browsing through the [storage space hierarchy](#) (see chapter 4).



Note: For more general information about searching for content, refer to the *Content Server User Guide* and *Records Manager User Guide*.

BASIC SEARCH PAGE

Use the basic search page to search for physical content items managed by the Physical Content Manager application using some common search criteria. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**.



Note: You can also access this page by choosing the 'Physical' option on the Search dropdown menu at the top of the Content Server interface.

Figure 6-1 Basic search page

The screenshot shows a web interface titled "Search Physical Items". At the top right of the interface are two buttons: "Search" and "Create Item". Below the title bar, there are four input fields stacked vertically, each with a label to its left: "Title", "Name", "Barcode Label", and "Current Location". The "Current Location" field has a "Browse..." button to its right. Below these fields, there are two more input fields labeled "Record Filing Date From" and "To". At the bottom of the form, there is a "Sort By:" label followed by two dropdown menus. The first dropdown menu is set to "Name" and the second is set to "Descending". To the right of these dropdowns is a "Search" button.

Here you can search for physical items based on a number of common criteria. To build your own search query using custom criteria, choose **Search—Advanced Search**. This opens the [Advanced Search Page](#) (page 6-4).

Menu Bar

This page contains a menu bar with the following options (depending on your assigned rights):

- ❖ **Search**—This menu has the following options:
 - **Advanced Search**
Choose this option to create a new search using custom criteria. See [Advanced Search Page](#) (page 6-4) for further details.
 - **Search Reservations**
Choose this option to search all existing reservations for physical content items. See [Chapter 7 \(Working With Reservations\)](#) for further details.

❖ **Create Item**

Choose this option to submit a physical content item to the content server (i.e., store its metadata, location, and retention information). See [Chapter 5 \(Working With Physical Content\)](#) for further details.

ADVANCED SEARCH PAGE

The advanced search page enables you to define your own search queries based on custom criteria. Search criteria are all selected individually, and can be combined in multiple variations using AND/OR logic. Advanced searches cannot be saved.

To access the advanced search page, open the **Search** menu on the [Basic Search Page](#) (page 6-2), and choose **Advanced Search**.

Figure 6-2 Advanced search page

The screenshot shows the 'Advanced Search Physical Items' interface. At the top, there's a header with 'Search Physical Items' and buttons for 'Search' and 'Create Item'. Below this is a secondary set of 'Search', 'Clear', and 'Quick Help' buttons. The main section is titled 'Search Builder' and contains three search criteria, each with a red 'X' icon for removal:

- Record Activation Date: On or After
- Is Frozen: Substring, 0, No
- Checked Out By: Matches

 Below the search builder is the 'Results Options' section, which includes:

- Results Per Page: 20
- Sort By: Name
- Ascending




 At the bottom of the page are 'Search', 'Clear', and 'Quick Help' buttons.

Page Features

The table below describes the various features of the Advanced Search Physical Items page.



Note: The menu bar on this page is the same as the one on the [Basic Search Page](#) (page 6-2).

Feature	Description
Search Commands	
Search button (top and bottom of page)	Searches for physical items in the system that meet your criteria, and displays the results in the Search Results Page (page 6-7).
Clear button (top and bottom of page)	Clears all search criteria fields and selections, and returns the page to its initial blank appearance.
Search Builder	
Search criteria fields	<p>This section allows you to build a search query by specifying metadata fields and values that you want to search on.</p> <p>Some fields are text entry fields, while others also allow you to select a value from a dropdown list. If a field requires a date, you can click on the calendar icon next to it to select a date from a popup dialog.</p> <p> Note: See the <i>Content Server User Guide</i> and <i>Records Manager User Guide</i> for general information about searching for content items.</p>
Remove criterion icon ()	Click this icon to remove a criterion from your search query.
Add criterion icon ()	Click this icon to add another criterion to your search query.
Results Options	
Results Per Page	<p>Specifies the maximum number of items displayed on each search results page.</p> <p>❖ Default: 20.</p>
Sort By	Select an attribute by which to sort the results. The list contains all the search criteria fields on the page.

Feature	Description
Sort order list	Specifies the sort order of the screening results: <ul style="list-style-type: none"> ❖ Ascending (default)—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order. ❖ Descending—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order.

Metadata Search Operators

Search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in dropdown lists immediately to the left of each field. For an explanation of the available search operators and their use, refer to the *Content Server User Guide*.

Metadata Search Conjunctions

Your system administrator may have set up Physical Content Manager to display search conjunctions on the search page, which enable you to use the Boolean logical operators AND and OR in your search criteria to expand or restrict the query.

Figure 6-3 Metadata fields with search conjunctions

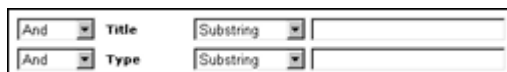


Figure 6-4 Metadata fields without search conjunctions



SEARCH RESULTS PAGE

The search results page lists all items in the system that meet the specified search criteria. It is displayed after you click **Search** on the [Basic Search Page](#) (page 6-2) or [Advanced Search Page](#) (page 6-4).



Note: In line with the Content Server and Records Manager security policies, you will always only see the physical items that you are entitled to see. If a physical item meet the search criteria but you do not have the appropriate rights to see it, then that item will not be included in the search results list.



Figure 6-5 Search results page

Found 2 potential items					
Freeze Results ▾ Labels ▾ Change View					
Delete Selected Items ▾ Edit ▾ Trigger Dates ▾ Request ▾ Content Basket					
<input type="checkbox"/> Select All	Name	Title	Date	Author	Actions
<input type="checkbox"/>	item2	PCM Item 2	3/21/07	sysadmin	
<input type="checkbox"/>	item1	PCM Item 1	3/21/07	sysadmin	

Page Features

The table below describes the various features of the search results page.

Feature	Description
Selection check boxes	These enable you to select one or more items in the list. To select all items, select the check box in the column header.
Name	This is the name of the physical item, as specified when the item was created.
Title	This is the title of the physical item, as specified when the item was created.
Date	This is the date that the physical item was submitted to the system.

Feature	Description
Author	This is the name of the user who created the physical item.
Actions menu icon ()	If you click on this icon, a popup menu is displayed that provides a number of options relevant to the specific content item. The available menu options depend on your assigned rights. For example, you may be able to view information about the content item, edit its attributes, manipulate the item, print an item label, or create links between items.
Info icon ()	If you click on this icon, the information page for the physical item is displayed (see page 5-10).

Menu Bars

Depending on your assigned rights, there may be two menu bars, one at the top of the page (with options that apply to all items in the search results list) and one in the table header (with options that apply to all selected items in the search results list). The available menu options depend on your assigned rights.

Page Menu Bar

This menu bar has the following options:

- ❖ **Freeze Results**—Choose this option to freeze all items in the search results list. If you freeze an item, all disposition processing for that item is halted until you unfreeze the item again. You may need to freeze items in order to comply with legal or audit requirements (for example, as a result of litigation).
- ❖ **Change View**—This menu has two options that enable you to switch between page views (thumbnail view or headline view).

Table Menu Bar

- ❖ **Freeze**—Choose this option to freeze all selected items in the search results list. If you freeze an item, all disposition processing for that item is halted until you unfreeze the item again. You may need to freeze items in order to comply with legal or audit requirements (for example, as a result of litigation).

- ❖ **Request**—This menu has two options that enable you to make [reservation](#) requests for all items or the selected items on the search results page (see chapter 7).
- ❖ **Content Basket**—This menu has two options that enable you to add all items or the selected items on the search results page to your [content basket](#) (see chapter 8).



Note: If you were assigned additional rights, the menus may include other options. For details on these options, refer to *Physical Content Manager Administration Guide*.

BROWSING TO PHYSICAL CONTENT

Use this procedure to browse to physical items in the defined storage space hierarchy.

To browse to physical items, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.
4. You can now use the [storage location tree](#) and the [Exploring pages](#) (see pages 4-7 and 4-9, respectively) to drill down the storage space hierarchy and browse to the items contained in a storage location.

SEARCHING FOR PHYSICAL CONTENT

Use this procedure to search for physical items managed by the Physical Content Manager application.

To search for physical items, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**.

The [Basic Search Page](#) (page 6-2) is displayed.



Note: If you want to use the [Advanced Search Page](#) (page 6-4), choose **Search—Advanced Search** on the basic search page.

4. Specify the search criteria, and click on **Search** when you are done.

The [Search Results Page](#) (page 6-7) is displayed, which lists all items that meet your search criteria.

WORKING WITH RESERVATIONS

OVERVIEW

This section covers the following topics:

Concepts

- ❖ [About Reservations](#) (page 7-2)
- ❖ [Reservation Request Properties](#) (page 7-3)

Interface

- ❖ [Create/Edit Request Page](#) (page 7-5)
- ❖ [Items for Request Page](#) (page 7-9)
- ❖ [Edit Request Item Page](#) (page 7-11)
- ❖ [Search Reservations Page](#) (page 7-13)
- ❖ [Reservation Search Results Page](#) (page 7-16)
- ❖ [Request Information Page](#) (page 7-19)
- ❖ [Request Item Information Page](#) (page 7-20)

Tasks

- ❖ [Creating a Reservation Request](#) (page 7-21)
- ❖ [Editing a Reservation Request](#) (page 7-22)

- ❖ [Deleting a Reservation Request](#) (page 7-23)
- ❖ [Editing a Request Item](#) (page 7-24)
- ❖ [Cancelling a Request Item](#) (page 7-24)
- ❖ [Deleting a Request Item](#) (page 7-25)
- ❖ [Searching For Reservations](#) (page 7-25)
- ❖ [Saving Reservation Search Results](#) (page 7-26)
- ❖ [Viewing Reservations for a Physical Item](#) (page 7-27)
- ❖ [Viewing Your Own Reservation Requests](#) (page 7-27)

ABOUT RESERVATIONS

Physical Content Manager offers circulation services for physical content items, in much the same way as a library. You can receive items, keep them for a specific period of time, and then return them, so they can be stored at their designated location again for someone else to use.

You can put a hold on items that are currently unavailable (for example, because someone else already has the item in their possession). If others also made a reservation request for an item, your reservation is put on a waiting list, which specifies the order in which people made a reservation for the item.

A reservation request may comprise multiple items.

After you make a reservation request, an e-mail notification is sent to the system administrator, who processes the request and starts the reservation fulfillment process in accordance with the applicable procedures in your organization.



Note: If you are a user with the standard reservation privileges, you cannot make any changes to an existing reservation. You can only do so if your system administrator has granted you special privileges beyond the defaults for a PCM requestor.



Note: Each user can normally place only one reservation request for the same item. However, your system administrator may have set up the system so that you can make multiple requests. This may be useful in environments where there are users that make reservation requests on behalf of several people (for example, manager assistants).

RESERVATION REQUEST PROPERTIES

Each reservation request has a number of properties, including:

- ❖ [Request Status](#) (page 7-3)
- ❖ [Transfer Method](#) (page 7-4)
- ❖ [Priority](#) (page 7-4)

Request Status

The request status specifies the current status for a reserved physical item, which can be any of the following:

- ❖ **Waiting List**—This means that the request item is currently already checked out to someone else. It will become available to the next requestor upon its return (unless the system administrator chooses to override the waiting list order).
- ❖ **In Process** (initial default)—This means that the reserved item is available and is being prepared for delivery. Only one request item for a reservation can have the “In Process” status.
- ❖ **Not Found**—This means that the request item could not be located in its designated location.
- ❖ **Unavailable**—This means that the request item cannot currently be processed for delivery.
- ❖ **Denied**—This means that the reservation request has been rejected by the administrator and cannot be fulfilled.
- ❖ **Cancelled**—This means that the reservation request was called off before it could be fulfilled.
- ❖ **Checked Out**—This means that the reserved item is currently in the possession of someone as part of a reservation request.
- ❖ **Overdue**—This means that the reserved item is currently checked out to someone who has failed to return the item within the maximum allowed checkout time. As a result, the reservation request cannot currently be fulfilled.



Note: Depending on how the system has been set up, an e-mail notification may have been sent out to the user who has the overdue item.

- ❖ **Returned**—This means that the checked-out item was returned to the storage repository, so that it is available for other users to reserve and check out.

Transfer Method

The transfer method determines how you will receive the reserved item. You specify the desired transfer method when you [create](#) a reservation request (see page 7-21).

The following methods are supported:

- ❖ **Copy**—This means that the physical content item will be duplicated, and the copy will be provided to the intended recipient. The copy can be physical (for example, a document run through a copier or a copied DVD) or electronic (for example, a scanned document or an ISO image of a CD).
- ❖ **Fax**—This means that the physical content item will be faxed to its intended recipient.
- ❖ **Mail**—This means that the original physical content item will be mailed to its intended recipient.
- ❖ **Pickup**—This means that the intended recipient will pick up the physical content item in person.
- ❖ **Email**—This means that the content item will be e-mailed to its intended recipient.

Priority

The priority of a reservation request specifies the urgency with which it needs to be fulfilled. You specify the desired priority when you [create](#) a reservation request (see page 7-21). The following priorities are supported:

- ❖ **No Priority**—This means that delivery of the requested item does not have any particular priority (i.e., there is no rush). The item can be delivered in accordance with the applicable fulfillment procedures.
- ❖ **ASAP Rush**—This means that the requested item should be delivered to its intended recipient as soon as possible after the reservation was made.
- ❖ **This Morning**—This means that the requested item should be delivered to its intended recipient the same morning that the reservation was made.
- ❖ **Today**—This means that the requested item should be delivered to its intended recipient the same day that the reservation was made.
- ❖ **This Week**—This means that the requested item should be delivered to its intended recipient the same week that the reservation was made.

CREATE/EDIT REQUEST PAGE

Create Request Page

Use the Create Request page to create a new reservation request. To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item(s) that you want to reserve, and add them to your [content basket](#).



Note: For more information on searching for physical content, refer to chapter 6. For more information on the content basket, refer to chapter 8.

3. Choose **My Content Server—My Content Basket** to open your content basket.

The [Content Basket page](#) (see page 8-7) is displayed.

4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.

A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.

5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

Figure 7-6 Create Request page

Create Request

Request Name

Request Date

* Requestor

* Security Group

Transfer Method

Priority

Required By Date

Deliver To Location

Location Comment

Comments

Edit Request Page



Note: You can edit your own reservation requests only if the system administrator has specifically set up the system to allow that.

Use the Edit Request page to modify the properties of an existing reservation request that you created yourself. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the reservation request that you want to edit, and choose **Request Information** from its actions popup menu ().

The [Request Information Page](#) (page 7-19) is displayed.

5. Choose **Edit** in the menu bar.

Page Features

The table below describes the various features of the Create Request and Edit Request pages.

Feature	Description
Request Name	Specify a name for the reservation request. This name does not have to be unique (in other words, you can create multiple reservation requests with the same name). ❖ Required ❖ Maximum number of characters: 30.
Request Date	This is the date and time that the reservation request was made. The default is the current date and time. This field is view-only on the Edit Request page. ❖ Required
Requestor	Specify the person who submitted the reservation request. The default is the user that is currently logged in. You can select a different user from the dropdown list, or manually enter a user. This field is view-only on the Edit Request page. ❖ Required
Security Group	Select the security group that the reservation request should be assigned to. Security groups are sets of files with the same access permissions. You can use security groups to limit the reservation requests that users have access to. ❖ Required.
Transfer Method	Select the desired transfer method for the reservation request (see page 7-4). ❖ Required

Feature	Description
Priority	<p>Select the desired priority for the reservation request (see page 7-4).</p> <p>❖ Required</p>
Required By Date	<p>Specify the date that the reserved item(s) should be available. You can click the calendar icon to select a date from a popup dialog.</p> <p>Providing a time along with a date is optional. If you do not specify a time, 12:00 PM (midnight) is assumed.</p>
Deliver To Location	<p>Specify the location that the reserved item(s) should be delivered to. If this location is somewhere in the storage space environment, you can use the Browse button to select the location (see page 5-9). Otherwise, specify 'OTHER' or leave this field empty. You can then use the Location Comment field to provide delivery details.</p> <p>If an item is checked out, its current location (as shown on the Physical Item Information page; see page 5-10) is automatically set to the value of this field for the associated reservation request. If no value was entered, the current location is set to "OTHER."</p>
Location Comment	<p>If required, specify details about the delivery location (for example, "Building A, Room 315").</p> <p>If an item is checked out, the value of this field is shown in the Current Location Comment field on the Physical Item Information page; see page 5-10). If you do not specify a location comment, the Current Location Comment field contains the login name of the user who made the reservation.</p>
Comments	<p>If required, specify additional comments about the reservation request (for example, delivery or handling instructions).</p>
Create button (Create page only)	<p>Click this button to create the reservation request.</p>

Feature	Description
Submit Update button (Edit page only)	Click this button to submit the updated reservation request.
Reset button	If you are creating a new reservation request, clicking this button resets the page to its initial default settings. If you are editing an existing reservation request, this returns the original request settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

ITEMS FOR REQUEST PAGE

A reservation may consist of more than one requested item. Use the Items for Request page to view a list of all individual items included in a reservation request that you created yourself.




Note: You can view the items in your own reservation requests only if the system administrator has specifically set up the system to allow that.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the reservation request whose request items you want to view, and choose **Request Information** from its actions popup menu ().

The [Request Information Page](#) (page 7-19) is displayed.

5. Choose **List Request Items** on the menu bar.

Figure 7-7 Items For Request page



Items for Request 'Contracts'					
Reservation					
					Actions: Select an action ▾
<input type="checkbox"/>	External Item	Barcode	Status	Transfer Method	Actions
<input type="checkbox"/>	Contracts2005	CONTRACTS2005	In Process	Pickup	
<input type="checkbox"/>	Contracts2004	CONTRACTS2004	In Process	Pickup	

This page shows the items that are included in the reservation request, including their name, barcode, current status, and selected transfer method.

Page Features

The table below describes the various features of the Items for Request page.

Feature	Description
Selection check boxes	Select the check box for each item that you want to perform the action in the main Actions dropdown menu on. You can select the check box in the column heading to select all items on the page.
External Item	This is the name of the individual physical item in a reservation request.
Barcode	This is the barcode value of the individual item in a reservation request.
Status	This is the current status of the individual item in a reservation request (see page 7-3).
Transfer Method	This is the selected transfer method for the individual item in a reservation request (see page 7-4).

Feature	Description
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with a number of options relevant to that particular item. The menu options include:</p> <ul style="list-style-type: none"> ❖ Request Item Information—Choose this option to display the information page for the individual request item (see page 7-20). ❖ Delete—Choose this option to delete the selected request item (see page 7-25). You can delete your own request items only if the system administrator has specifically set up the system to allow that.
Info icon ()	<p>If you click on this icon, the Request Item Information page (page 7-20) is displayed.</p>

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers a number of options that apply to all items on the page. You can change the view of the page (thumbnail view of headline view).

EDIT REQUEST ITEM PAGE

Use the Edit Request Item page to modify the properties of an item in an existing reservation request that you created yourself.



Note: You can edit your own request items only if the system administrator has specifically set up the system to allow that.

To edit a request item of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu (☰).

The [Request Item Information Page](#) (page 7-20) is displayed.

5. Choose **Edit** on the menu bar.

Figure 7-8 Edit Request Item page

Page Features

The table below describes the various features of the Edit Request Item page.

Feature	Description
External Item	This is the name of the request item.
Status	This is the status of the request item (see page 7-3). The default is the item's current status. Depending on your assigned rights, you may be able to select a different status from the dropdown list.
Checkout Date	If the request item is currently checked out by someone, this field shows the date and time the item was checked out.

Feature	Description
Due Date	If the request item is currently checked out by someone, this field shows the date and time the item should be returned (in accordance with the defined checkout period).
Comments	This field enables you to add or modify comments about the requested item.
Transfer Date	If the request item is currently checked out by someone, this field shows the date and time the item was transferred to its intended recipient (if a timestamp was specified).
Submit Update button	Click this button to submit the updated information about the request item.
Reset button	Click this button to return the original settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

SEARCH RESERVATIONS PAGE

Use the Search Reservations page to find existing reservations that meet your search criteria. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**
The [Basic Search Page](#) (page 6-2) is displayed.
4. Click **Search—Reservations**.

Figure 7-9 Search Reservations page

Search Reservations

v Search Configure

Display individual Request Items

Request Name	Substring	<input type="text"/>	
Request Date		From <input type="text"/>	To <input type="text"/>
Requestor	Substring	<input type="text"/>	
Security Group	Substring	<input type="text"/>	<input type="text"/>
Completed	Substring	<input type="text"/>	<input type="text"/>
Transfer Method	Substring	<input type="text"/>	<input type="text"/>
Priority	Substring	<input type="text"/>	<input type="text"/>
Required By Date		From <input type="text"/>	To <input type="text"/>
Deliver To Location	Substring	<input type="text"/> <input type="button" value="Browse..."/>	
Location Comment	Substring	<input type="text"/>	
Request Comments	Substring	<input type="text"/>	
External Item	Substring	<input type="text"/>	
Status	Substring	<input type="text"/>	<input type="text"/>
Checkout Date		From <input type="text"/>	To <input type="text"/>
Item Comments	Substring	<input type="text"/>	
Transfer Date		From <input type="text"/>	To <input type="text"/>
Returned Date		From <input type="text"/>	To <input type="text"/>

Results Options

Results Per Page: **Sort By:**

Page Features

The table below describes the various features of the Search Reservations page.

Feature	Description
Criteria Definition	
Display individual request items	If you select this check box, the search results (page 7-16) will display all individual request items within the reservations that meet your search criteria. If you clear it, only the reservations are displayed (and not the items in them).
Search criteria fields	<p>Use these fields to specify the search criteria by which to search the existing reservations.</p> <p>If the search field contains a date, you can use the calendar icon to the right of the field to pick a date from a calendar popup.</p> <p>For more general information about searching, refer to the <i>Records Manager User Guide</i> and <i>Content Server User Guide</i>.</p> <p>Please note the following</p> <ul style="list-style-type: none"> ❖ A reservation request is considered completed if none of its request items are still pending or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.
Results Options	
Results Per Page	<p>Specify the maximum number of reservations displayed on each search results page.</p> <ul style="list-style-type: none"> ❖ Default: 20.
Sort By	<p>Select an attribute by which to sort the results.</p> <p>The list contains all of the search criteria options for reservations.</p>

Feature	Description
Sort order list	Specify the sort order of the search results: <ul style="list-style-type: none"> ❖ Ascending (default)—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order. ❖ Descending—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order.
Search Commands	
Search button	Click this button to perform a search for reservations based on your specified criteria.
Clear button	Click this button to clear all criteria fields on the page and reset the page to its initial blank state.
Quick Help button	Click this button to display context-specific help information about this page.

RESERVATION SEARCH RESULTS PAGE



This page shows the results of a search query for reservations based on the criteria specified on the [Search Reservations page](#) (see page 7-13). It is displayed after you click the Search button on that page.

Figure 7-10 Reservation search results (without individual request items)

The screenshot shows a web interface titled "Reservation Search Results" with a sub-header "Found 1 potential item matching the query." Below this is a table with the following structure:



Actions: <input type="text" value="Select an action"/>				
Request Name	Request Date	Requestor	Completed	Actions
Contracts	3/17/06 8:44 AM	sysadmin	No	

Figure 7-11 Reservation search results (with individual request items)

Reservation Search Results Found 2 potential items matching the query.					
					Actions: <input type="text" value="Select an action"/>
Request Date	Requestor	External Item	Barcode	Status	Actions
3/17/06 8:44 AM	sysadmin	Contracts2005	CONTRACTS2005	In Process	 
3/17/06 8:44 AM	sysadmin	Contracts2004	CONTRACTS2004	In Process	 



Page Features (Without Individual Request Items)

The table below describes the various features of the Reservation Search Results page without the individual request items—that is, the “Display individual request items” check box on the [Search Reservations page](#) (see page 7-13) was not selected.

Feature	Description
Request Name	This is the identifier that references the reservation request, as specified when the reservation request was made (see page 7-5).
Request Date	This is the date and time that the reservation request was made.
Requestor	This is the person who submitted the reservation request.
Completed	This specifies whether the reservation request has been completed or not (“Yes” or “No”). A reservation request is considered completed if none of its request items are still pending (in process) or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.
Actions menu icon ()	If you click on this icon for a search result item, a popup menu is displayed with the following option: ❖ Request Information —Choose this option to display the information page for the reservation request (see page 7-19).
Info icon ()	If you click on this icon, the Request Information page (page 7-19) is displayed.

Page Features (With Individual Request Items)

The table below describes the various features of the Reservation Search Results page with the individual request items—that is, the “Display individual request items” check box on the [Search Reservations page](#) (see page 7-13) was selected.

Feature	Description
Request Date	This is the date and time that the reservation request was made.
Requestor	This is the person who submitted the reservation request.
External Item	This is the name of an individual physical item that is currently included in a reservation request.
Barcode	This is the barcode value of an individual physical item that is currently included in a reservation request.
Status	This is the current status of an individual physical item that is currently included in a reservation request (see page 7-3).
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with the following options:</p> <ul style="list-style-type: none"> ❖ Request Information—Choose this option to display the information page for the reservation request (see page 7-19). ❖ Request Item Information—Choose this option to display the information page for the individual request item (see page 7-20). ❖ Physical Item Information—Choose this option to display the information page for the physical item (see page 5-10).
Info icon ()	If you click on this icon, the information page for the physical item (see page 5-10) is displayed.

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers a number of options that apply to all items on the page. The following options are available:

- ❖ **Thumbnail View**—Choose this option to display the page in thumbnail view.
- ❖ **Headline View**—Choose this option to display the page in headline view.
- ❖ **Save Search Results**—Choose this option to save the search results to a file. The file format depends on how the system has been set up. It can be PDF, HTML, XML, or Microsoft Excel (XLS).



Note: If you were assigned additional rights, the Actions dropdown menu may include other options. For details on these options, refer to *Physical Content Manager Administration Guide*.

REQUEST INFORMATION PAGE

Use the Request Information page to view the properties of an existing reservation request. To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the reservation request whose properties you want to view (see page 7-13).



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which lists all reservations requests that meet your search criteria.


3. Locate the reservation request whose properties you want to view, and choose **Request Information** from its actions popup menu (.

Figure 7-12 Request Information page



This page shows the current properties of the selected reservation request, including its request date, requestor, transfer method, priority, and delivery location. It also shows whether the reservation request has been completed. A reservation request is considered completed if all its request items are returned, denied, not found, unavailable or cancelled.

REQUEST ITEM INFORMATION PAGE

Use the Request Item Information page to view the properties of an individual item in an existing reservation request. To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the request item whose properties you want to view (see page 7-13).



Note: On the [Search Reservations page](#) (see page 7-13), make sure that you select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which lists all reservations requests that meet your search criteria.


3. Locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu ().

Figure 7-13 Request Item Information page

The screenshot shows a window titled "Request Item Information". Inside the window, the following text is displayed:

External Item: Contracts2005
Status: Waiting List
Override Due Date: No

At the bottom right of the window is an "OK" button.

This page shows the current properties of the selected request item: its name and status, and whether this item can be checked out for a different period of time than the default.

CREATING A RESERVATION REQUEST

Use this procedure to create a new reservation request for one or more physical items.



Note: You can only make reservation requests for physical (external) items. Error messages will be displayed if you attempt to reserve electronic (internal) items.



Note: Each user can normally place only one reservation request for the same item. However, your system administrator may have set up the system so that you can make multiple requests. This may be useful in environments where there are users that make reservation requests on behalf of several people (for example, manager assistants).



Note: If you create a reservation request for a physical item that has other items [within in](#) (see page 5-19), then all these items are included in the reservation as well. You do not see the child items in the request, but when you check out the parent item, all child items are also checked out. You can still create requests for each of the child items, but you cannot check them out until its parent item is returned.

To make a reservation request, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item(s) that you want to reserve, and add them to your [content basket](#).



Note: For more information on searching for physical content, refer to chapter 6. For more information on the content basket, refer to chapter 8.

3. Choose **My Content Server—My Content Basket** to open your content basket.

The [Content Basket page](#) (see page 8-7) is displayed.

4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.

A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.

5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

The [Create Request page](#) (see page 7-5) is displayed.

6. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.

7. Click **Create** when you are done.

The items are now reserved, and the system administrator is notified of your reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in your organization. If a reserved item is already checked out, you are placed on a waiting list for that item.



Note: If you are a user with the standard reservation privileges, you cannot make any changes to an existing reservation. You can only do so if your system administrator has granted you special privileges beyond the defaults for a PCM requestor.

EDITING A RESERVATION REQUEST

Use this procedure to modify the properties of an existing reservation request that you created yourself.




Note: You can edit your own reservation requests only if the system administrator has specifically set up the system to allow that.

To edit a reservation request of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the reservation request that you want to edit, and choose **Request Information** from its actions popup menu (.

The [Request Information Page](#) (page 7-19) is displayed.

5. Choose **Edit** in the menu bar.

The [Edit Request page](#) (see page 7-5) is displayed.

6. Modify the properties of the reservation request as required, and click **Submit Update** when you are done.

DELETING A RESERVATION REQUEST

Use this procedure to delete an existing reservation request that you created yourself.




Note: You can delete your own reservation requests only if the system administrator has specifically set up the system to allow that.

To delete a reservation request of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the reservation request that you want to edit, and choose **Request Information** from its actions popup menu (.

The [Request Information Page](#) (page 7-19) is displayed.

5. Choose **Delete** on the menu bar.

The reservation request is deleted immediately, without any further prompts. If there were no errors, a message is displayed stating that the reservation request was deleted successfully.

EDITING A REQUEST ITEM

Use this procedure to edit the status and/or comments of a request item in an existing reservation request that you created yourself.




Note: You can edit your own request items only if the system administrator has specifically set up the system to allow that.

To edit a request item of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu ().

The [Request Item Information Page](#) (page 7-20) is displayed.

5. Choose **Edit** on the menu bar.

The [Edit Request Item Page](#) (page 7-11) is displayed.

6. Modify the item status and/or comments, and click **Submit Update** when you are done.

CANCELLING A REQUEST ITEM

Use this procedure to cancel a request item in an existing reservation request that you created yourself.



Note: You can cancel your own request items only if the system administrator has specifically set up the system to allow that.




Note: You can only cancel request items whose current status is “In Process” or “Waiting List.”

To cancel a request item of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the request item that you want to cancel, and choose **Cancel** from its actions popup menu ().

DELETING A REQUEST ITEM

Use this procedure to delete a request item in an existing reservation request that you created yourself.




Note: You can delete your own request items only if the system administrator has specifically set up the system to allow that.

To delete a request item of your own, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

4. Locate the request item that you want to cancel, and choose **Delete** from its actions popup menu ().

SEARCHING FOR RESERVATIONS

Use this procedure to search for an existing reservation request in the system.

To search for reservations, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [Basic Search Page](#) (page 6-2) is displayed.

4. **Search—Reservations.**

The [Search Reservations Page](#) (page 7-13) is displayed.

5. Specify the criteria by which you want to search. If you want the search results to display all individual request items contained in reservations in addition to the reservations themselves, select the “Display individual request items” check box.

6. Click **Search** when you are done.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all current reservations in the system that meet the specified criteria.

SAVING RESERVATION SEARCH RESULTS

Use this procedure to save the results of a search for reservations in the system.

To save reservation search results, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [Basic Search Page](#) (page 6-2) is displayed.

4. **Search—Reservations.**

The [Search Reservations Page](#) (page 7-13) is displayed.

5. Specify the criteria by which you want to search. If you want the search results to display all individual request items contained in reservations in addition to the reservations themselves, select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

6. Click **Search** when you are done.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all current reservations in the system that meet the specified criteria.

7. Click **Save Search Results** on the menu bar.

The search results are saved to a file.



Note: The file format depends on how the system has been set up. It can be PDF, HTML, XML, or Microsoft Excel (XLS).



VIEWING RESERVATIONS FOR A PHYSICAL ITEM

Use this procedure to view all outstanding reservation requests for a physical item.



Note: You must have the Reservation.Read right to view the reservations of a physical item. By default, this right is assigned to both predefined physical content management roles ('pcmrequestor' and 'pcmadmin').

To view the reservations of a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item for which you want to see the current reservation requests. For further details, refer to [Chapter 6 \(Searching for Physical Content\)](#).
3. Click on the item's information icon () or choose the **Physical Item Information** option in its action popup menu ().

The [Physical Item Information page](#) (page 5-10) is displayed.

4. Click **View Reservations for Item** on the menu bar.

The [Reservation Search Results page](#) is displayed (see page 7-16), which lists all outstanding reservation request for the current physical item.

VIEWING YOUR OWN RESERVATION REQUESTS

Use this procedure to view all of your own outstanding reservation requests.

To view your own reservations, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 7-16) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

WORKING WITH THE CONTENT BASKET

OVERVIEW

This section explains how to use the content basket to work with multiple physical content items at once. It covers the following topics:

Concepts

- ❖ [About the Content Basket](#) (page 8-2)
- ❖ [Items in the Content Basket](#) (page 8-2)

Interface

- ❖ [Content Basket Page](#) (page 8-7)

Tasks

- ❖ [Viewing the Contents of the Content Basket](#) (page 8-10)
- ❖ [Adding Items to the Content Basket](#) (page 8-10)
- ❖ [Removing Items From the Content Basket](#) (page 8-11)
- ❖ [Sorting Items in the Content Basket](#) (page 8-12)
- ❖ [Making Reservation Requests for Items in the Content Basket](#) (page 8-13)
- ❖ [Downloading Items in the Content Basket](#) (page 8-14)

- ❖ [Creating E-Mail Links to Items in the Content Basket](#) (page 8-15)
- ❖ [Checking In Information About Items in the Content Basket](#) (page 8-17)

ABOUT THE CONTENT BASKET

The [content basket](#) in Physical Content Manager serves as a personal storage space where you can temporarily store multiple items for later processing. For example, if you want to [reserve](#) physical items for check-out, you search for all items that you want to reserve, and add each of them to your content basket. After adding all items, you can [open](#) your content basket and [make a reservation request](#) for the items in the basket.

Depending on the system setup and your assigned rights, the content basket can be used to do any the following:

- ❖ [Make reservation requests for one or more physical items](#) (see page 8-13)
- ❖ [Download a zip file with one of more items](#) (see page 8-14)
- ❖ [Create e-mail messages with links to one or more items](#) (see page 8-15)
- ❖ [Check in a PDF file with information about one or more items](#) (see page 8-17)

ITEMS IN THE CONTENT BASKET

The [content basket](#) can contain any number of items managed by Content Server, Records Manager, Physical Content Manager, or other add-ons.









Items—both internal and external, both records and non-records—can be added to the content basket from their information page or any search results page via options in the Actions dropdown menu on these pages. For an electronic (internal) item, you can specify whether the native file and/or the web-viewable rendition of the item should be added to the content basket. Multiple renditions and/or revisions of the same item may simultaneously exist in the content basket.

The following topics are important with regard to items in the content basket:

- ❖ [Item Thumbnails](#) (page 8-3)
- ❖ [Item Information](#) (page 8-3)
- ❖ [Renditions](#) (page 8-5)
- ❖ [Display Order](#) (page 8-6)

Item Thumbnails

Every item in the [content basket](#) has a thumbnail icon which identifies its type:

Item Type	Thumbnail
Internal (electronic) items managed by Content Server or Records Manager	Icon associated with the item's specified content type
External item managed by Physical Content Manager of object type "Box"	
External item managed by Physical Content Manager of object type "Document"	
External item managed by Physical Content Manager of object type "Folder"	
External item managed by Physical Content Manager of object type "Micro"	
External item managed by Physical Content Manager of object type "Optical"	
External item managed by Physical Content Manager of object type "Tape"	
External item managed by Physical Content Manager with no object type assigned	
All other items	

Item Information

The information provided for an item in the [content basket](#) depends on the type of item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)
- ❖ [Unavailable Items](#)

Internal (Electronic) Items

The information provided for internal (electronic) items managed by Content Server or Records Manager is:

- Item title (in bold)
- Native file name
- Content ID
- Revision number

Figure 8-1 Information for internal (electronic) item in content basket

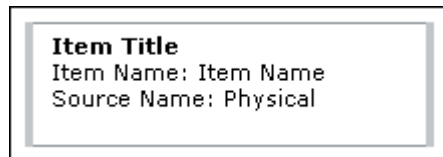


External (Physical) Items

The information provided for external (physical) items managed by Physical Content Manager is:

- Item title (in bold)
- Item name
- Source name (for external items managed by Physical Content Manager, this will always be “Physical”)

Figure 8-2 Information for external (physical) item in content basket



Unavailable Items

Items remain in the content basket until they are removed from it. If the status of an item changes, the content basket is not automatically updated to reflect this change. This means that items may become unavailable since they were initially added to the content basket. For example, they may be deleted or they may be assigned to a different security group to which you have no access. If an item has become unavailable, this is indicated in the content basket.

Figure 8-3 Unavailable item in content basket

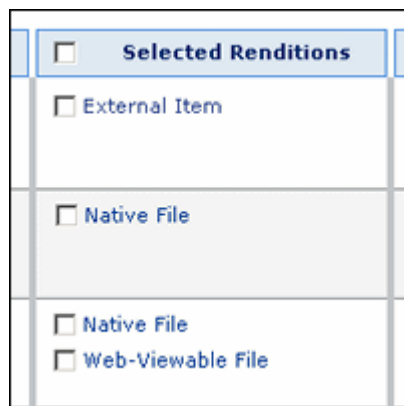
Note: You can use the **Remove All Unavailable Items** option in the **Basket** menu at the top of the page to remove all items from the content basket that have become unavailable since you added them to the basket.

Renditions

An item can have more than one rendition. Electronic items have a native (i.e., original) file, and may also have one or more alternative renditions (typically, a web-viewable file, which can be viewed in a web browser). When adding an electronic item to the [content basket](#), you select a specific rendition to be added (for example, native or web-viewable). You may choose to add all available renditions of an item to the content basket, but you do not need to.

An external, physical item does not have renditions as there is no file associated with it (only metadata information).

The [content basket](#) shows what renditions of an item are included (see Figure 8-4). Each of the renditions can be selected separately. If the item is electronic, the rendition name is a hyperlink that opens the associated rendition of the item. The “rendition” for physical items is called “External Item,” which is not hyperlinked as there is no electronic version of the item to open.

Figure 8-4 Renditions of items in the content basket



Note: To select all renditions of all items in the content basket, select the check box in the heading of the Select Renditions column.

Display Order

The standard display order for items in the [content basket](#) is the order in which they were added. Any new items are added to the bottom of the list. If you are adding multiple items at the same time (from a search results page), then the items are added in the order in which they were displayed on the search results page.

The Order Priority column for the [content basket](#) shows numbers that reflect the display order of the item in the basket. The lower the number, the higher the item is on the list ('1' is at the very top of the list).

Figure 8-5 Sort order in content basket

Order Priority
1
2
3
4

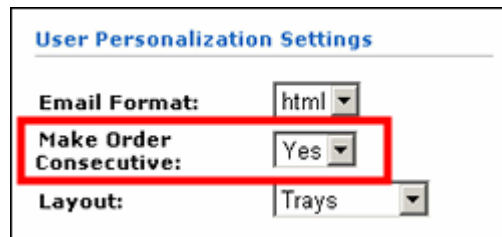
Initially, the order priority numbers are consecutive: 1, 2, 3, 4, etc. If you want to move an item to a different spot in the list, you can change its number and choose **Sort Basket** in the **Basket** menu at the top of the page. The list is then re-ordered according to the new number sequence (from low to high). If you change the number of an item to a number that is already in the list, then the item with the modified number is moved to immediately above the item with the existing number. If you want to move an item to the top of the list, change its number to '1'. If you want to move it to the bottom of the list, give it a sufficiently high number (for example, '9999').

Consecutive Number Sequence

When you delete items from the content basket or change their numbers to modify the display order, you may end up with a number sequence that is no longer consecutive. In other words, there may be missing or duplicate numbers in the sequence. You can make the number sequence fully consecutive again (without any gaps) by choosing **Make Sort Order Consecutive** in the **Basket** menu at the top of the page. This does not re-order the items in the list, but merely resets the number sequence to be consecutive (“1, 2, 3, 4” rather than, say, “1, 3, 4, 8.”).

If you want the number sequence to be made consecutive automatically every time you update the display order, you can set the Make Order Consecutive option on your user profile page to ‘Yes’ (this is not the default). The Actions dropdown menu for the content basket will then no longer have the Make Sort Order Consecutive option as this is done automatically with every display order update.

Figure 8-6 Make Order Consecutive option on user profile page



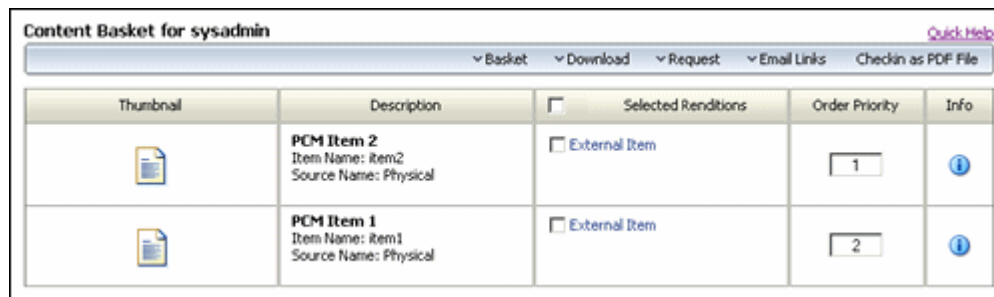
The image shows a screenshot of the 'User Personalization Settings' page. It features three settings: 'Email Format' set to 'html', 'Make Order Consecutive' set to 'Yes', and 'Layout' set to 'Trays'. The 'Make Order Consecutive' setting is highlighted with a red rectangular box.

CONTENT BASKET PAGE

The Content Basket page shows all items that are currently in your own content basket. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

Figure 8-7 Content Basket page




Note: You can only view your own content basket (unless, of course, you log in as someone else).

Page Features

The table below describes the various features of the Content Basket page.

Feature	Description
Thumbnail	This column shows a thumbnail image that represents the type of item. For more information, see Item Thumbnails (page 8-3).
Description	This column provides information about the item in the content basket. For more information, see Item Information (page 8-3).
Selected Renditions	This column shows all renditions for an item. For physical (external) items, this will always be “External Item.” For electronic (internal) items, it will be the selected rendition (for example, “Native File” and/or “Web-Viewable File”). You can use the check boxes to select the rendition(s) that an operation should be performed on. If you select the select box in the column heading, all renditions currently in the content basket are selected. For more information, see Renditions (page 8-5).

Feature	Description
Order Priority	When you open the Content Basket page, this column shows a number sequence that reflects the display order of the items. You can modify the numbers to change the display order. For more information, see Display Order (page 8-6).
Info icon ()	If you click this icon for an item, its information page is displayed (see page 5-10).

Menu Bar

The Content Basket page includes a menu bar at top of the page. Depending on the system setup and a user's assigned rights, this menu may include the following options:

- ❖ **Basket**—This menu has the following options:
 - **Sort Basket**—Choose this option to [sort the items in the content basket](#) (see page 8-12).
 - **Make Sort Order Consecutive**—Choose this option to [sort the items in the content basket by their order priority](#) (see page 8-12). This option is available only if you did not [set the sort order to be made consecutive automatically](#) with every update (see page 8-7).
 - **Remove All Items**—Choose this option to [remove all items](#) from the content basket (see page 8-11).
 - **Remove Selected Items**—Choose this option to [remove the selected items](#) from the content basket (see page 8-11).
 - **Remove All Unavailable Items**—Choose this option to [remove all items](#) in the content basket that are no longer available (see page 8-11).
- ❖ **Download**—This menu has the following options:
 - **Download Selected**—Choose this option to [download a zip file](#) with the selected items in the content basket (see page 8-14). This option is available only if the system has been set up to support this feature.
 - **Download All**—Choose this option to [download a zip file](#) with all items in the content basket (see page 8-14). This option is available only if the system has been set up to support this feature.

- ❖ **Request**—This menu has the following options:
 - **Request Selected Items**—Choose this option to [make a reservation request](#) for the selected items in the content basket (see page 8-13).
 - **Request All Items**—Choose this option to [make a reservation request](#) for all items in the content basket (see page 8-13).
- ❖ **Email Links**—This menu has the following options:
 - **E-Mail Links to Selected Items**—Choose this option to [create an e-mail message](#) in your default e-mail application with links to the selected items in the content basket (see page 8-15).
 - **E-Mail Links to All Items**—Choose this option to [create an e-mail message](#) in your default e-mail application with links to all items in the content basket (see page 8-15).
- ❖ **Check In as PDF File**—Choose this option to [generate a PDF file](#) with information about all items in the content basket and check it into the content server (see page 8-17).

VIEWING THE CONTENTS OF THE CONTENT BASKET

Use this procedure to view the items that are currently in your content basket.

To view your content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.

ADDING ITEMS TO THE CONTENT BASKET

Use this procedure to add items to your content basket:

1. Log into the content server.
2. [Search](#) for the item(s) that you want to add to the content basket (see page 6-2).
3. On the search results page, select the check box of each item that you want to add to your content basket.

4. Click **Content Basket** in the menu bar at the top of the page, and choose any of the following options depending on what you want to add to the content basket:
 - **Add Selected Items to Basket - Native**
 - **Add Selected Items to Basket - Web**
 - **Add All Items to Basket - Native**
 - **Add All Items to Basket - Web**



Note: The “All Items” options add all items *on the current page* to the content basket, which may not be all items in the complete search results. If you want to add all items in the complete search results list, you need to add them per page.

The [Content Basket page](#) (page 8-7) is displayed, with the new item(s) added at the bottom of the list.

REMOVING ITEMS FROM THE CONTENT BASKET

Use this procedure to remove items from your content basket. When you remove items, they are only removed from the content basket; they are not deleted from the system altogether.

Removing Individual Items

To remove individual items from the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.
The [Content Basket page](#) (page 8-7) is displayed.
4. Select the check box of each item (rendition) that you want to remove from the content basket
5. Click **Basket** in the menu bar at the top of the page, and choose **Remove Selected Items**.

The selected items are removed immediately (without any further prompts), and the [Content Basket page](#) (page 8-7) is refreshed to show the list without the deleted item(s).

Removing All Items

To remove all items from the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.

4. Click **Basket** in the menu bar at the top of the page, and choose **Remove All Items**.

All items are removed immediately (without any further prompts), and the [Content Basket page](#) (page 8-7) is refreshed to show an empty basket.

Removing Unavailable Items

To remove all [unavailable items](#) from the content basket (see page 8-4), complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.

4. Click **Basket** in the menu bar at the top of the page, and choose **Remove All Unavailable Items**.

The [unavailable items](#) are removed immediately (without any further prompts), and the [Content Basket page](#) (page 8-7) is refreshed to show the list without the unavailable item(s).

SORTING ITEMS IN THE CONTENT BASKET

Use this procedure to re-sort the items in your content basket. You can change the display order of the item by modifying the numbers in the Order Priority column.

To re-sort the items in the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.

4. Modify the numbers in the Order Priority column to reflect the display order you want. See [Display Order](#) (page 8-6) for further details.
5. Click **Basket** in the menu bar at the top of the page, and choose **Sort Basket**.

The items in the content basket are re-ordered in the specified number sequence (from low to high).



Note: Optionally, you can also choose **Make Sort Order Consecutive** in the **Basket** menu to make the number sequence fully consecutive again without any gaps (“1, 2, 3, 4” rather than, say, “1, 3, 4, 8.”). If the Action dropdown menu does not have this option, consecutive sort order is set as the default on your user profile page.

MAKING RESERVATION REQUESTS FOR ITEMS IN THE CONTENT BASKET

Use this option to make a reservation request for one or more physical items in your content basket.



Note: You can only make reservation requests for physical items. Error messages will be displayed if you attempt to reserve electronic items.



Note: For more information about reservations, refer to [Chapter 7 \(Working With Reservations\)](#).

To make a reservation request for items in the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.



Note: If your content basket does not contain the item(s) that you want to reserved, [add](#) them first (see page 8-10).

4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.

A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.

5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

The [Create Request page](#) (see page 7-5) is displayed.

6. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.
7. Click **Create** when you are done.

The items are now reserved, and the system administrator is notified of your reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in your organization. If a reserved item is already checked out, you are placed on a waiting list for that item.

DOWNLOADING ITEMS IN THE CONTENT BASKET

Use this procedure to download a zip file with one or more items in your content basket.



Note: You can only download items in a zip file if the system has been set up to support this feature.

To create the zip file, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.



Note: If your content basket does not contain the item(s) that you want to download, [add](#) them first (see page 8-10).

4. Select the check box of each item that you want to download, and choose **Download Selected Items** from the **Download** menu at the top of the page. If you want to include all items in the zip file, you can also choose **Download All Items**.

A zip file called “Bundle.zip” is created, and a dialog is displayed where you can open or save the file.

Contents of Zip File

What is included in the zip file for an item depends on the type of that item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)

Internal (Electronic) Items

The zip file contains the selected rendition file for the item. The file name for the item is built up as follows:

<Item_Title> (Primary|Web) [<Content_ID> Revision-<Rev. No.>].<File_Extension>

where “Primary” refers to the native file rendition, and “Web” to the web-viewable rendition. For example: *Report2005 (Primary) [CS12025 Revision-2].doc*.

External (Physical) Items

The zip file contains a file with the metadata, location, and retention information about the physical item, in the archive metadata format as specified on the Configure Records Management page. (See the *Records Manager Administration Guide* for details.) The file name is built up as follows:

<Random_Number>] (External Item) [<Item_Name>].<File_Extension>

where the file extension depends on the configured format setting. For example: *810871584 (External Item) [Contracts2005].hda*.

CREATING E-MAIL LINKS TO ITEMS IN THE CONTENT BASKET

Use this procedure to create a new e-mail message in your default e-mail client, with information and links for one or more items in your content basket.

To create the e-mail, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.



Note: If your content basket does not contain the item(s) that you want to include in the e-mail message, [add](#) them first (see page 8-10).

4. Select the check box of each item (rendition) that you want to include in the e-mail message, and choose **E-Mail Links to Selected Items** from the **Email Links** menu at the top of the page. If you want to include all items in the e-mail message, you can also choose **E-Mail Links to All Items**.

A new e-mail message window for your default e-mail client is displayed, with “Content Item Rendition Links” as the subject line and links and information for the items in the message body.



Note: Some e-mail clients have limitations with regard to the number of characters used in the body of a message. Adding a large number of items as links to an e-mail may exceed the limitation, resulting in some links not being listed.

Contents of E-Mail Message

What is included in the e-mail message for an item depends on the type of that item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)

Internal (Electronic) Items

The e-mail message contains the content ID and title of each selected item, as well as hyperlinks to the selected rendition file(s) for the item.

External (Physical) Items

The e-mail message contains the name and title of each selected physical item, as well as a hyperlink to the item’s information page.

CHECKING IN INFORMATION ABOUT ITEMS IN THE CONTENT BASKET

Use this procedure to generate a PDF file with information about one or more items in the content basket and check it into the content server.



Note: The generated PDF file cannot be viewed using Adobe Acrobat 5.x or earlier. You need at least version 6.0 of the Acrobat software.

To generate the PDF file, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 8-7) is displayed.



Note: If your content basket does not contain the item(s) that you want to include in the PDF file, [add](#) them first (see page 8-10).

4. Select the check box of each item (rendition) that you want to include in the PDF file, and choose **Check in as PDF File** from the menu at the top of the page.

A PDF file is generated, and the content check-in page is displayed. Please note that you do not need to specify a primary file (this is the newly created PDF file).

5. Specify the metadata as required, and click **Check In** to submit the file to the content server.



Note: The file name is the specified content ID, so if you specify “Report1” as the content ID, then the file name will be *Report1.pdf*.



Note: For more information about checking files into the content server, refer to the *Content Server User Guide*. For more information about checking in records, refer to the *Records Manager User Guide*.

Contents of PDF File

The PDF file contains one page for each item included, plus one final page with empty boxes for author, reviewer, and approver signatures. The following information is included for each item:

- ❖ **Title**
- ❖ **File Name** (set to “undefined” for physical items)
- ❖ **Content ID** (set to the name for physical items)
- ❖ **Revision Label**



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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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