Oracle® Fusion Middleware

User's Guide for Content Server

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Oracle Fusion Middleware User's Guide for Content Server 11*g* Release 1 (11.1.1)

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A User Interface

Preface

This user's guide provides information for end users of Oracle Content Server, which serves as the base for the Oracle Universal Content Management system.

Audience

This document is intended for end users of the Content Server system. It is also a valuable resource for system administrators who manage a Content Server instance.

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For more information, see the specific documents that discuss different aspects of Content Server functionality. See your system administrator for details about the documentation available to you.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
Forward slashes (/)	Forward slashes are used to separate the directory levels in a path to a UNIX server, directory, or file. Forward slashes are also used to separate parts of an Internet address. A forward slash will always be included at the end of a UNIX directory name and might or might not be included at the end of an Internet address.
Backward slashes (\)	Backward slashes are used to separate the levels in a path to a Windows server, directory, or file. A backward slash will always be included at the end of a Windows server, directory, or file path.

1 Introduction

This guide discusses how to use Content Server, including how to check content in and out of the system, how to use workflows, how to search for files, how to group content, and how to use images and videos. This chapter provides an overview to the system and the document for end users. It covers the following topics:

- "About This Guide" on page 1-1
- "Product Overview" on page 1-1

1.1 About This Guide

This guide is intended to help those using Content Server to manage content. It provides overview and reference information for the pages used when working with Content Server through a standard web browser.

1.2 Product Overview

This section describes concepts discussed in this document and provides an overview of system functionality. It contains the following topics:

- "Content Server" on page 1-2
- "Content Repository" on page 1-2
- "Revision Control" on page 1-2
- "Metadata" on page 1-2
- "Security" on page 1-3
- "Users" on page 1-3
- "Conversion Features" on page 1-4
- "Indexing" on page 1-4
- "Finding Content" on page 1-4
- "Storing and Moving Content with Folders and WebDAV" on page 1-4
- "Grouping Content" on page 1-5
- "Managing Images and Video" on page 1-5
- "Routing Content through Workflows" on page 1-5

1.2.1 Content Server

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

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

1.2.2 Content Repository

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

A file that is checked into the content server is called a *content item*. Any user with the correct security permissions can view the web-viewable version of a content item or get a copy of the original file from the repository of native files. Security permissions determine who can view, revise, and delete a particular content item. For more information see "Security" on page 1-3.

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

1.2.3 Revision Control

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

When you are finished making changes to the file, you check it back into the content server, which automatically stores the new file as a new *revision* of the content item. Previous revisions remain available for you to view or copy, but the latest revision will always be displayed by default from content server web pages.

Every content item in the repository for web-viewable files has a *persistent URL*. This means that each content item has a unique web address that does not change from one revision to the next. Therefore, the most current version is always displayed when you point your browser to the URL of a content item. See "Working with File Revisions" on page 5-4 for more information.

1.2.4 Metadata

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

Content Server automatically. The metadata is stored in a database that works in conjunction with Content Server.

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

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

See Chapter 4, "Finding Content Items" for more information.

1.2.5 Security

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

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

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

1.2.6 Users

Content Server is designed for two types of users:

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

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

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

1.2.7 Conversion Features

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

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

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

1.2.8 Indexing

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

1.2.9 Finding Content

Content Server provides many ways for users to find content:

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

Refer to Chapter 4, "Finding Content Items" for more information.

1.2.10 Storing and Moving Content with Folders and WebDAV

Folders is an optional component for use with Content Server that, when enabled, provides a hierarchical folder interface to content in Content Server in the form of "virtual folders" (also called "hierarchical folders"). Virtual folders enable you to create a multi-level folder structure.

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

1.2.11 Grouping Content

Content Server permits you to group content using folios. A content folio is an XML file checked into Content Server that uses elements to define a hierarchical structure of nodes, slots, and specified content items in Content Server. In practice, a content folio is a logical grouping, or a framework in which content stored in Content Server can be structured. *Simple folios* are a flat container, while *advanced folios* can nest content in a hierarchy within folders.

1.2.12 Managing Images and Video

You can use Digital Asset Manager functionality to quickly find, group, convert, and download images and videos of various sizes, formats, and resolutions to meet your business needs, all while maintaining a consistency of use across your organization. For example, an organization's logo may need to be available in a variety of sizes for advertisements, web pages, and presentation, or a company training video may need to be available in a variety of formats for streaming on an intranet, presenting to an audience, or copying to tape.

1.2.13 Routing Content through Workflows

The workflow process routes a file for review and approval before it is released to the content server repository. Users are notified by e-mail when they have a file to review.

Two types of workflows can be created in Content Server:

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

See Chapter 8, "Working with Workflows" for more information.

2

Getting Started

This section describes the basics of using Oracle Content Server. It covers the following topics:

- "Using a Supported Web Browser" on page 2-1
- "Accessing Oracle Content Server" on page 2-1

2.1 Using a Supported Web Browser

Consumers and contributors access Content Server from a standard web browser. The computer you use to access the content server is referred to as a *client computer*. Content Server can be accessed from any of the web browsers listed in Table 2–1, on a supported client computer.

Table 2–1 Supported Web Browsers

Browser	Versions
Internet Explorer	7, 8
Firefox	3.5+
Safari	4.*x*

Note: This documentation is based on the assumption that you are using the default Trays layout.

2.2 Accessing Oracle Content Server

You can access your Oracle Content Server instance by entering a web URL in one of the web browsers listed in Table 2–1 and logging in.The URL specifies the host name and port number for Oracle Universal Content Management (Oracle UCM) Managed Server.

The host name is the name of the machine that is running the Oracle UCM Managed Server. The default port number for Oracle UCM is `16200`.

To access Oracle Content Server:

1. Browse to your Oracle Content Server instance with a web URL in this format:

   `http://host_name:port_number/cs/`

   For example:

   `http://myhost.example.com:16200/cs/`

2. On the Content Server home page, click **Login**.
3. Enter your user name and password, and click **Sign In**.

   Your Oracle Content Server home page appears. For information about this page, see "Home Page" on page 3-3.

3 Becoming Familiar with the Interface

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

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

This section covers the following topics:

3.1 Customizable Interface

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

3.2 Portal Navigation Bar

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

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

Link	Description
Home	Displays the Home Page.
Library	Displays the content server's Library Folders. You can drill down, or browse through, folders in this hierarchy to find specific files.
Search	Displays the Search Tray. From this page, you can perform metadata and full-text searches to find specific files.
Microsoft Login	If you are already logged in to your Microsoft network, clicking this link logs you in to Content Server. This link is displayed only if your organization is using Microsoft Network security to log in to Content Server. Many browsers, such as Mozilla Firefox, support logging in with this security, after some configuration. Your Content Server instance might be integrated with your enterprise sign-on system. For more information, ask your system administrator.
My Content Server	Expands to display links to personal check in pages and personal search pages.
Browse Content	Expands to display a Browse Content Tray for finding content and any other special folders configured by the system administrator.
Search	Expands to provide several options for Searching with Database Metadata Search and includes a tab for viewing persistent Working with Search Results
Content Management	Expands to display several links for managing content, such as Content Check-In Form, Checked-Out Content Page or the Checked-Out Content for [User] Page), Work In Progress Page, Active Workflows Page, and expired content.

3.3 Toolbar

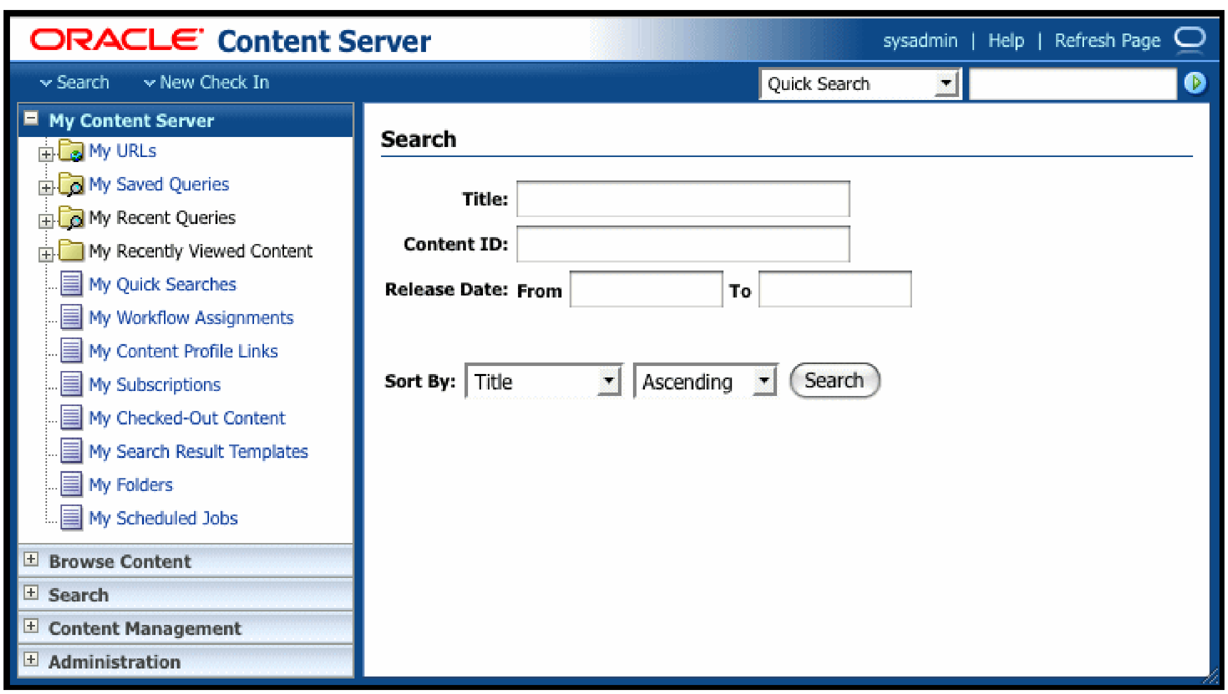
The toolbar is displayed at the top of all Content Server web pages. It contains some of the same navigation links as the Portal Navigation Bar, and also provides access to the online help system.

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

Link	Description
Content Server link	Displays the Home Page.
User Profile link	Displays the User Profile Page and provides information needed for Editing Your User Profile. The link is either a user name or the user's full name.
Logout	Logs out of Content Server. Available only if the optional ExtranetLook component is installed.
Help	Displays the online help system.
Refresh Page	Updates the current page.
Search	Displays the Advanced Search Page or optionally pulls down to display links to Content Profiles search pages set up by the system administrator. From the Advanced search or content profile search page, you can perform metadata and full-text searches to find specific files.
New Check In	Displays the Content Check-In Form, which is used to check new files into the content server.
Quick Search	Enables you to perform searches from any page.

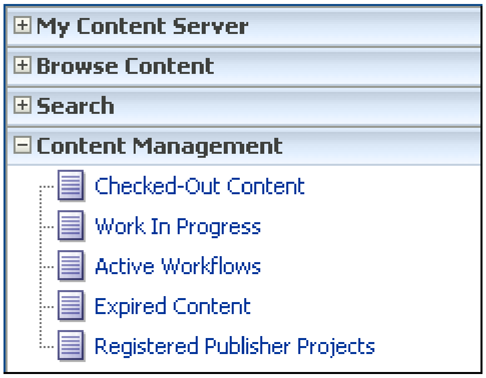
3.4 Home Page

The home page typically includes the tray navigation, the top toolbar, and other page content and functions as determined by your system administrator. If you set up a default saved query, the results are displayed on this page (you may have to scroll down to view them). The home page is displayed when you first log in, and you can return to the home page anytime by clicking the **Oracle Content Server** link in the upper left.



3.5 Content Management Tray

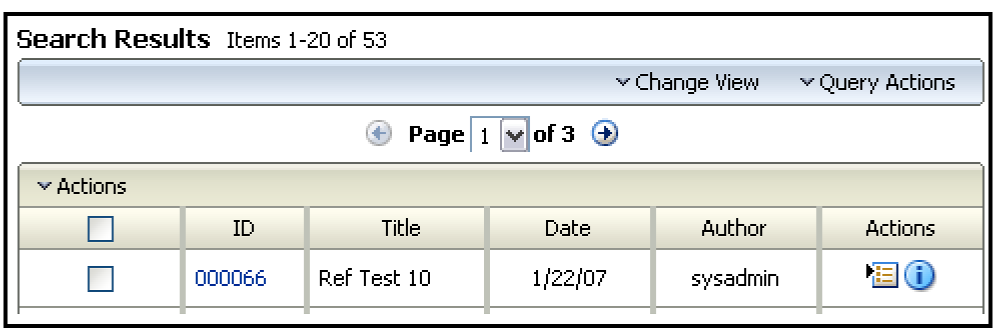
The Content Management tray enables contributors to manage content in Content Server. To open this tray, click **Content Management** in the Portal Navigation Bar.



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

3.6 Action Menus

Action menus are menus with options that change depending on the context.

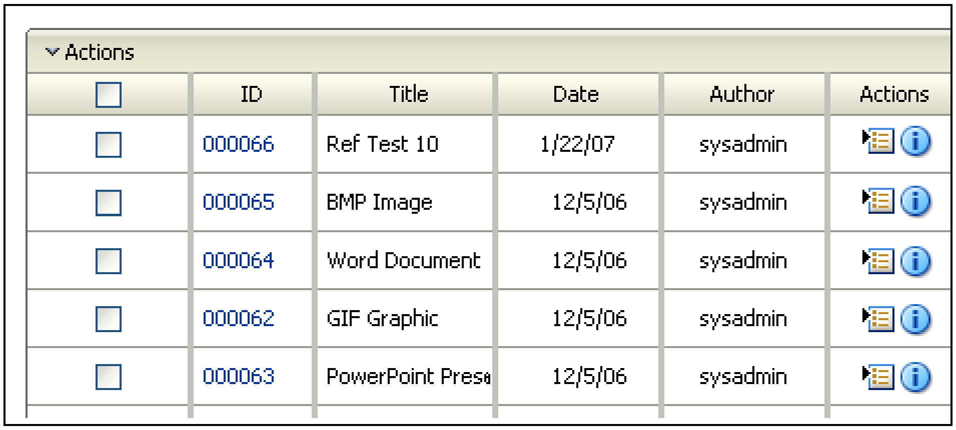


There are three types of action menus:

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

- Table Action Menus: These action menus are displayed above a table of content items, and list options that can be applied to multiple items selected in the table. For example, if the Upload Files Window or Download Files Screen is available, you can select multiple items from a search result list and use the table action menu to download them.

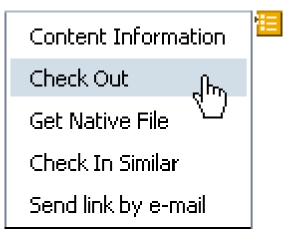
Figure 3–1 Table Action Menu When Download Applet Enabled



	ID	Title	Date	Author	Actions
	000066	Ref Test 10	1/22/07	sysadmin	
	000065	BMP Image	12/5/06	sysadmin	
	000064	Word Document	12/5/06	sysadmin	
	000062	GIF Graphic	12/5/06	sysadmin	
	000063	PowerPoint Prese	12/5/06	sysadmin	

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

Figure 3–2 Item Action Menu from a Search Result



3.7 Pop-Up Calendar

The Pop-up calendar component is automatically installed with Content Server. The calendar icon is displayed to the right of all editable date metadata fields:

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

Clicking the calendar icon displays the Pop-Up Calendar Screen.

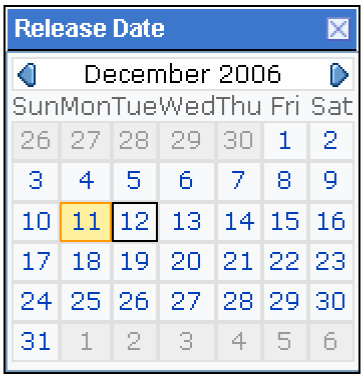
This enables you to quickly select dates and easily move between previous and future months and years. It also eliminates date formatting errors and typos because date fields are automatically populated with the user-selected date.

This section covers the following topics:

- "Pop-Up Calendar Screen" on page 3-6
- "Setting Release and Expiration Dates" on page 3-7
- "Updating Expiration Dates" on page 3-7

3.7.1 Pop-Up Calendar Screen

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



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

Element	Description
Double right-facing arrows	Enables you to navigate to future years without using the year menu. Each click progresses one year. The calendar adjusts to display the appropriate days for the selected month in the future year.
Monthly calendar days	Displays the days appropriate for the selected month and year.

3.7.2 Setting Release and Expiration Dates

You can use the Pop-up Calendar to populate the Release Date and Expiration Date metadata fields on the Content Check In and Search pages. Free-form text entry of dates is allowed.

Note: You can change the user locale to control date format. For information about changing the locale, see "Editing Your User Profile" on page 3-8.

To select a date using the Pop-up Calendar:

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

3.7.3 Updating Expiration Dates

To update the Expiration Date metadata field:

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

3.8 Personalizing the Interface

This section covers the following topics:

- "My Content Server Tray" on page 3-13
- "Search Result Templates" on page 3-14
- "Search Result Templates for 'User' Page" on page 3-14
- "Classic View Template" on page 3-15
- "Headline View Template" on page 3-16
- "Thumbnail View Template" on page 3-17

3.8.1 About Personalization

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

- You can change personal information, such as your full name, password, and e-mail address on the User Profile Page.
- You can add links to the My Content Server Tray. This provides quick access to functions you use often, such as predefined searches and links to your favorite web sites.
- You can personalize the way you search for and display content by specifying the default search form used on the Advanced Search page accessed from the Quick Search Field, and creating new Search Result Templates for displaying different types of content in different ways.

3.8.2 Editing Your User Profile

Use the following procedure to edit your user profile information:

1. Click the *user_name* link at the top of the main menu bar.

   The User Profile Page is displayed.

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

   - If you are changing your password, you must enter the new password in both the Password and Confirm Password fields.

     If you are using an enterprise authentication system, the password field might not be available.

   - Do not change your user type or user locale; these fields should be changed only by a system administrator.
   - Select the **Override** checkbox next to the **User Locale** field to ensure that you can temporarily override the locale setting and that your language choices persist.

3. Select an option for e-mail notification format, either HTML or text.
4. Enable or disable the upload and download applets.

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

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

   Changing from the **Trays** menu will render the documentation somewhat inaccurate.

6. Click **Update**.

3.8.3 Creating a Custom Search Result Template

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

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

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

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

5. Click **Save**.

3.8.4 Editing Saved Queries

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

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

   The Saved Queries Page is displayed.

2. To display the results of a query on the home page, select the **Default** option for that query and select the **Show Default Query** check box.
3. To set the number of content items displayed on the home page for the selected default query, enter a number in the Results on Portal Page field, and make sure that the **Show Default Query** check box is selected.
4. Click **Update**.

Note: See "Saving a Query" on page 4-27 for information on how to save a query link in your portal navigation bar.

3.8.5 Saving Personal URLs

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

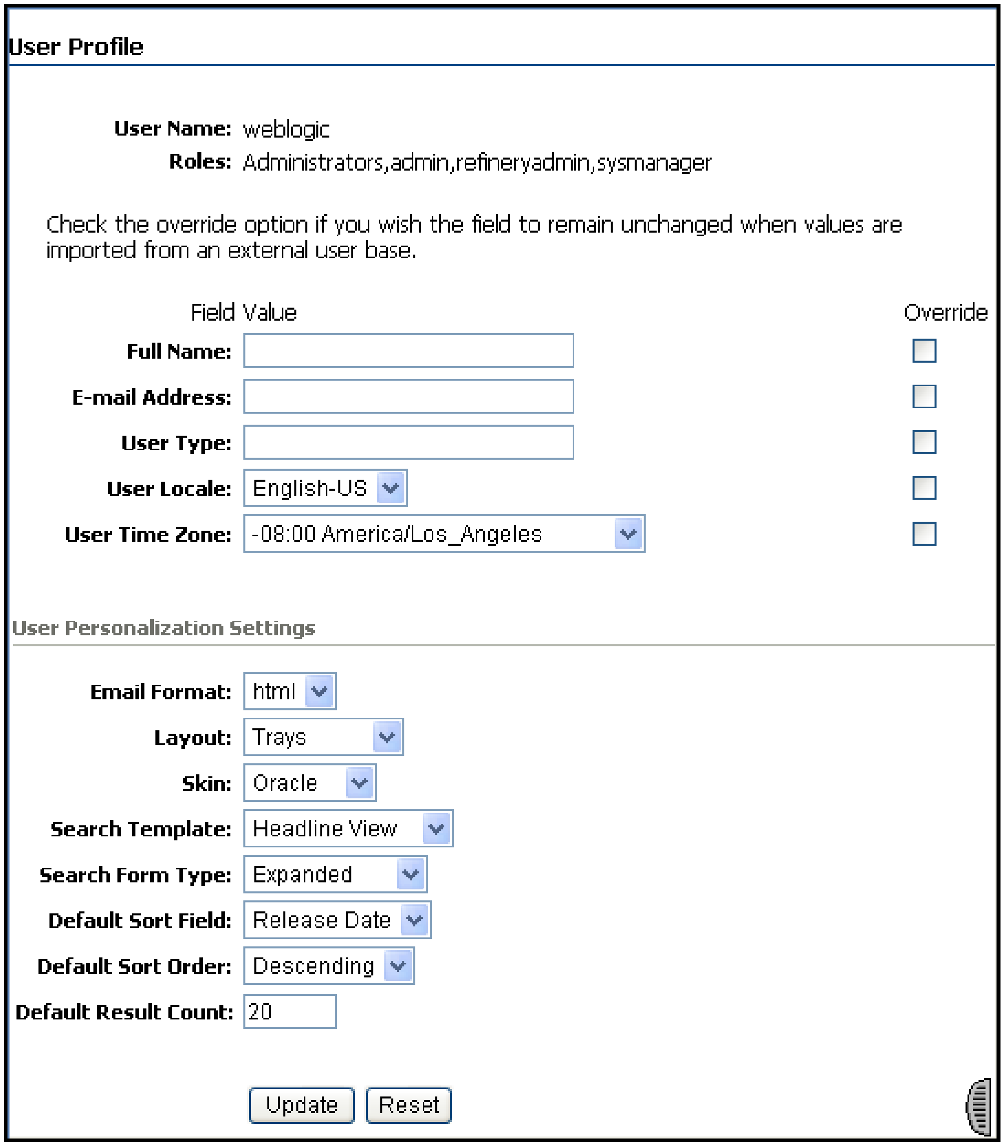
1. Click the **My URLs** link under the My Content Server Tray in the portal navigation bar.

   The Personal URLs for User Name is displayed.

2. Type a descriptive name in the Title field. This name will appear as the link in your portal navigation bar.
3. Enter a complete web address in the URL field, for example: *http://www.oracle.com.*
4. Click **Update**.

3.8.6 User Profile Page

Your user profile enables you to change information about yourself and provides access to other user functions. To access the user profile page, click the *user_name* link at the top of the main menu bar



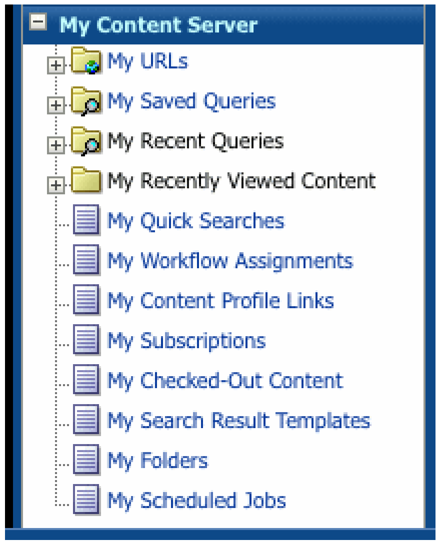
Element	Description
User Name field	The user currently logged in. This field cannot be modified.
Roles field	The roles assigned to your user login. Roles determine what access you have to content and system functions. This field cannot be modified.
Full Name field	The full name is used by the system administrator to identify users easily.
E-mail Address field	The e-mail address that is used for subscription notifications and workflow notifications.
User Type field	An identifier that can be used by the system administrator to place users in groups. **This field should not be changed.**

Element	Description
User Locale field	Sets the language and date/time format displayed on content server pages. If the system administrator has enabled more than one locale option, you can select the locale that you prefer. Select the **Override** checkbox next to this field to ensure that you can temporarily override the locale setting and that your language choices persist.
Email Format field	**html**: You will receive subscription and workflow notification e-mails in HTML format. **text**: You will receive subscription and workflow notification e-mails in plain-text format.
Layout	Sets the user interface of Content Server. **Trays**: This is the default layout when Content Server is installed. Features include expanding trays in the Portal Navigation Bar, including a Search tray and Result tab. This is a frame-based layout. **Top Menus**: Trays are removed from the Portal Navigation Bar and replaced by menus located above the content area. This layout does not use frames.
Skin	Skins provide predefined color and icon choices for each layout. **Oracle (Default)**: Predominantly blue and khaki **Oracle 2**: Predominantly blue and gold
Search Template	Sets the information included in a search result, and the format in which it is displayed. **Headline**: A single line list of search results with no thumbnail image. **Thumbnail**: A thumbnail image or content type icon is displayed. **Custom Search Template**: A variable for a search template that your administrator may have made. A custom search template enables you to select a customized search result view, if this exists in your Content Server instance, including **Classic**, **Thumbnail**, and **Headline** formats for displaying search results. If the Custom Search Template variable is available in your instance, you or your administrator can create and save customized search templates and define what metadata to list in a search result and how to display it. A custom search template can be set as a default view, selected from a search results page, or associated with a particular targeted search query. The search result view can be changed dynamically using the **Content Actions** menu on a search results page. Once selected on a search results page, the view is saved as the default view for subsequent search results.
Search Form Type	Sets the default search form on the Advanced Search page. Expanded Form: Displays all search field options on a single page. Query Builder Form: Offers available search fields for selection from lists, and enables field for direct edit of the query text.
Default Sort Field	Sets the default field by which to sort search results.
Default Sort Order	Sets the default order in which search results are displayed.

Element	Description
Default Result Count	Sets the maximum number of content items listed on a search results field.
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.

3.8.7 My Content Server Tray

The My Content Server tray places links to various system functions specific to you in your portal navigation bar. To access the links in this tray, expand the tray by clicking **My Content Server** on the Portal Navigation Bar.



Element	Description
My URLs icon	Expands the folder to display links to any URLs you have saved using the Personal URLs for User Name page. Saved URLs can include web addresses to internal content or external sites.
My URLs link	Displays the Personal URLs for User Name page, where you can save links to web sites in your portal navigation bar.
My Saved Queries icon	Expands the folder to display links to any searches you have saved using the Save Search action on a search results page.
My Saved Queries link	Displays the Saved Queries Page, where you can remove searches from your My Saved Queries folder.
My Recent Queries icon	Expands the folder to display links to the most recent queries you have performed.
My Recent Queries link	Displays the My Recent Queries page, where you can view a list of the most recent search queries you have made and resubmit a query.
My Recently Viewed Content icon	Expands the folder to display links to the most recently viewed content items you have viewed.
My Recently Viewed Content link	Displays the My Recently Viewed Content list of the most recent Content Information Pages you have viewed. Selecting one of the list items opens that Content Information Page.

Element	Description
My Quick Searches	Displays a list of the most recent quick searches you have performed.
My Workflow Assignments	Displays a list of all content items currently in a workflow for which you have responsibility.
My Content Profile Links	Displays a list of your defined content profile links.
My Subscriptions	Displays a list of all content items to which you are subscribed.
My Checked-Out Content	Displays a list of all content currently checked out by you.
My Search Result Templates	Displays the Search Result Templates, from which you can build custom search results views based on the provided *Classic*, *Headline*, and *Thumbnail* templates.
My Folders	Displays a list of folders for you.
My Scheduled Jobs	Displays a list of jobs requiring your attention.

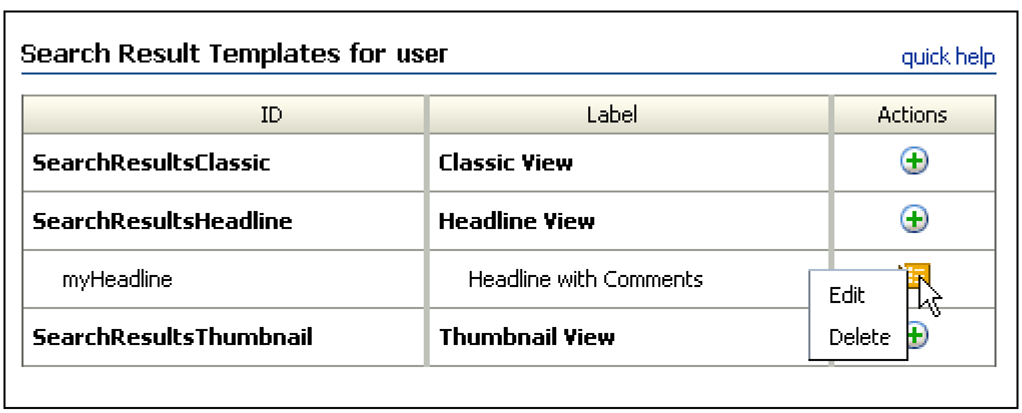
3.8.8 Search Result Templates

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

- Classic View Template
- Headline View Template
- Thumbnail View Template

3.8.9 Search Result Templates for 'User' Page

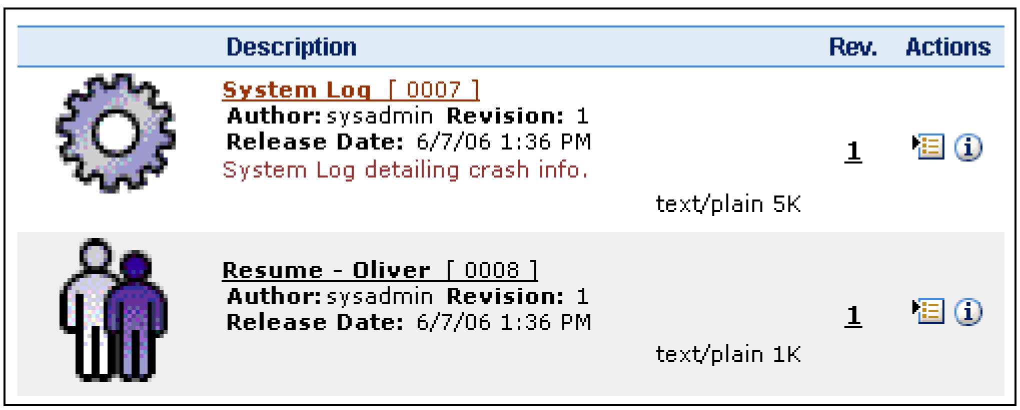
This page displays a list of all templates currently available and provides the option to add, edit, or delete custom templates based on the provided ones. The provided templates cannot be modified. To access this page click **My Search Result Templates** in the My Content Server Tray.



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

3.8.10 Classic View Template

The Classic template lists content items sequentially in single rows, based on the default sort field and order set on the User Profile Page.

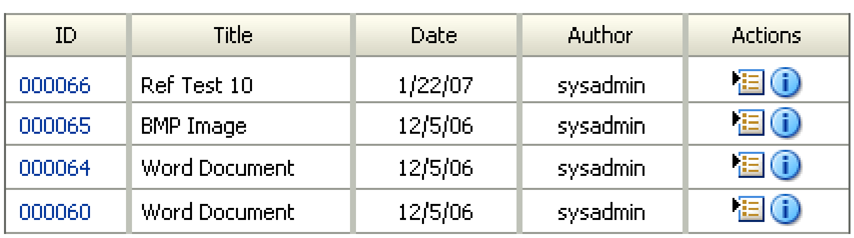


Column	Description
Content Icon or Thumbnail image	An icon based on the content type is displayed. Optionally, if your system administrator has set up Content Server to create a thumbnail image of the content, then the thumbnail image is displayed.

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

3.8.11 Headline View Template

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



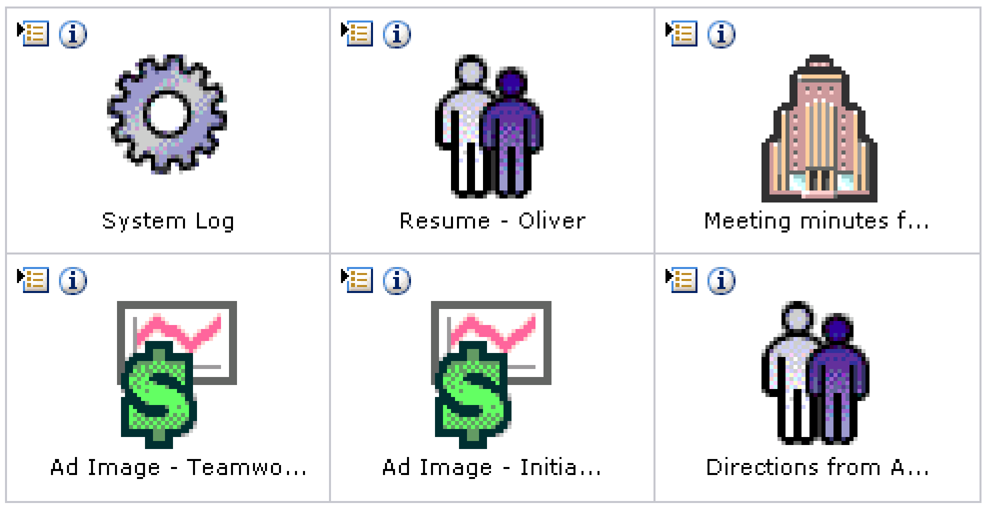
ID	Title	Date	Author	Actions
000066	Ref Test 10	1/22/07	sysadmin	
000065	BMP Image	12/5/06	sysadmin	
000064	Word Document	12/5/06	sysadmin	
000060	Word Document	12/5/06	sysadmin	

Column	Description
ID	A unique identifier of the content item, linked to a web-viewable version of the content item, if it is available. If no web-viewable version is available, it is linked to the native file.
Title	Displays the title of the content item without any associated link.
Date	Displays the date the content item was released.
Author	Displays the user name of the person who last checked in the content item.

Column	Description
Actions	Displays the Item Actions Menu icon and the Content Information icon. **Item Action Menu**: Clicking this opens a menu of actions that can be applied to the selected content item. **Content Information Icon**: Clicking this displays the Content Information Page of the selected content item.

3.8.12 Thumbnail View Template

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



Item	Description
Actions icons	Displays the Item Actions Menu icon and the Content Information icon. **Item Action Menu**: Clicking this opens a menu of actions that can be applied to the selected content item. **Content Information Icon**: Clicking this displays the Content Information Page.
Thumbnail Icon or Image	Displays an icon based on the content type or a thumbnail image of the content if your system administrator has set up Content Server to create one, linked to a web-viewable version of the content item, if it is available. If no web-viewable version is available, it is linked to the native file.
Title	Displays the title of the content item without any associated link. To maintain the grid structure, long titles are truncated to a single line. Rolling the mouse over the title expands the text to display the full title.

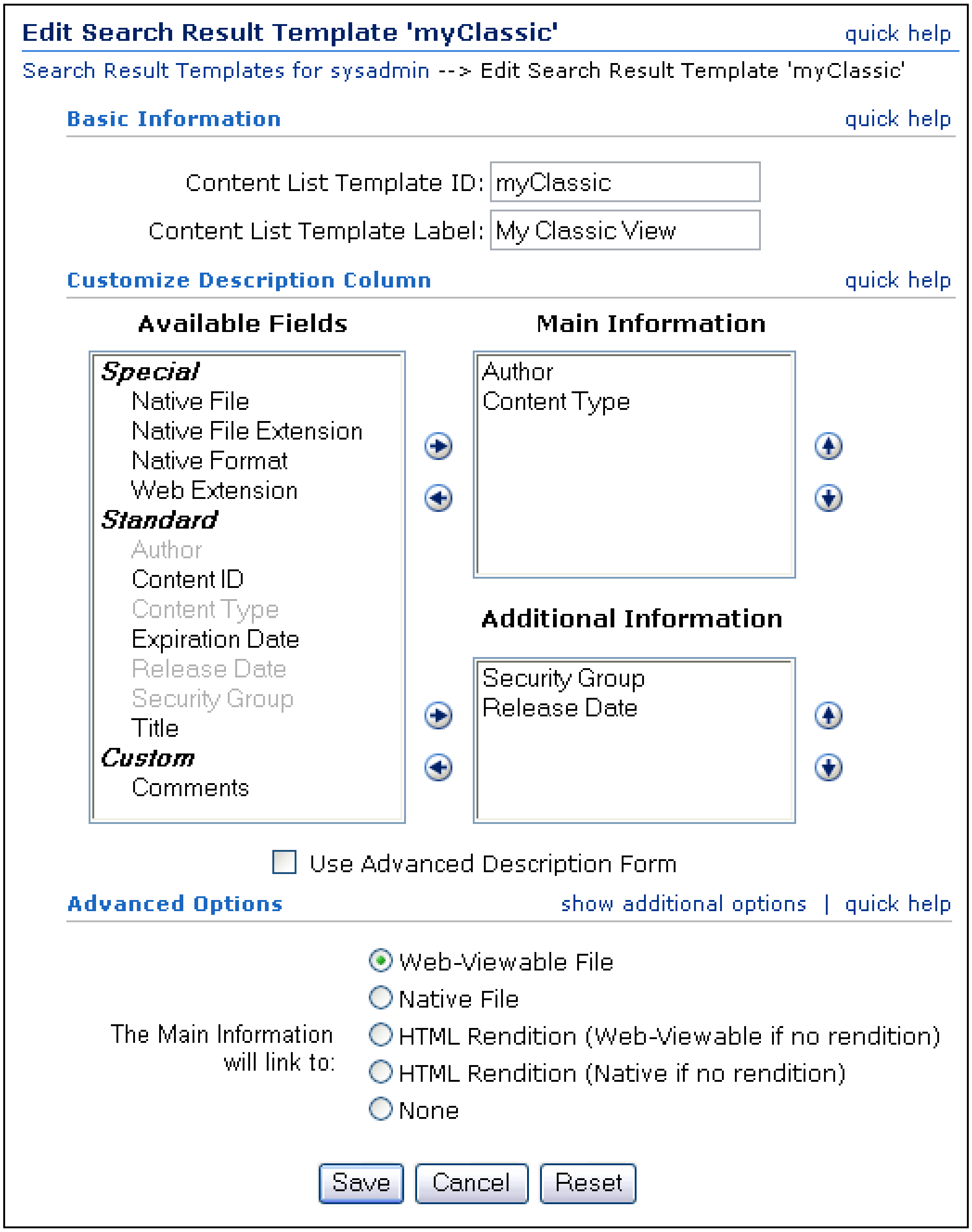
3.9 Creating and Editing Custom Search Result Templates

You can personalize how search results are displayed by selecting an option from the list on the User Profile Page, or from the Search Results Page. There are three templates available by default, and you have the option to create new views based on the three provided templates. In this way, you can customize the metadata information you want to see on a search result. You can even specify different search results templates to be used for different saved queries.

This section covers the following topics:

3.9.1 Create/Edit Classic View Search Result Template Page

The Create/Edit Classic View Search Result Template page allows you to add templates based on the Classic View, that specify what content item information is listed on a search results page and how that information is displayed.



This page is accessed by clicking the **Add Item** icon in the Actions column of the Classic View option on the Search Result Templates for 'User' Page.

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

There are three main areas of this page:

- Classic View Basic Information
- Classic View Customize Description Column
- Classic View Advanced Options

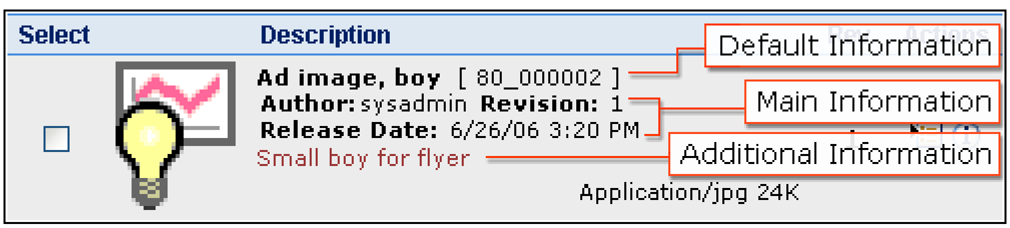
3.9.2 Classic View Basic Information

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

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

3.9.3 Classic View Customize Description Column

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



Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow moves the field to the Columns box. Each available field can only be included once in either the Main Information section or Additional Information section, unless the **Use Advanced Description Form** check box is enabled. **Special**: Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. ■ Native File ■ Native File Extension ■ Native Format ■ Web Extension ■ Web File Size ■ Vault File Size **Standard**: The standard Content Server information fields. ■ Author ■ Content ID ■ Content Type ■ Expiration Date ■ Release Date ■ Security Group ■ Title **Custom**: Comments and any custom fields created by your system administrator. The title and content ID are displayed in all custom search result templates based on the Classic View, even if those fields are not specifically selected from the Available Fields section. If the title or content ID is selected, it will be duplicated.
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Additional Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Use Advanced Description Form	Enabling this option displays an advanced version of the Main and Additional Information fields. When enabled, the code for the display of each available field moved to the Main or Additional Information sections is shown and can be edited directly. Additionally, any item from the Available Fields section can be included in both the Main or Additional Information sections multiple times.

3.9.4 Classic View Advanced Options

The following are the classic view advanced options and their respective descriptions.

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

3.9.5 Create/Edit Headline View Search Result Template Page

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

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

There are four main areas of this page:

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

3.9.6 Headline View Basic Information

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

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

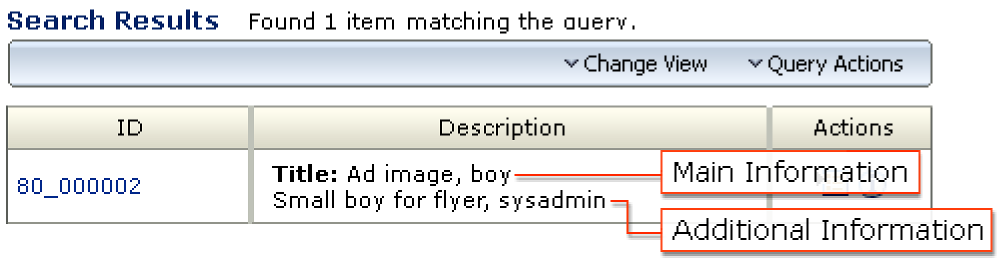
3.9.7 Headline View Customize Columns

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

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

3.9.8 Headline View Customize Description Column

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



Item	Description
Available Fields	Selecting an item in this box and clicking the right arrow moves the field to the Columns box. Each available field can only be included once in either the Main Information section or Additional Information section, unless the **Use Advanced Description Form** check box is enabled. **Special**: Any special field in the content server. Different components or configurations may add additional special fields. The following fields are available by default. ■ Native File ■ Native File Extension ■ Native Format ■ Web Extension ■ Web File Size ■ Vault File Size **Standard**: The standard Content Server information fields: ■ Author ■ Content ID ■ Content Type ■ Expiration Date ■ Release Date ■ Security Group ■ Title **Custom**: Comments and any custom fields created by your system administrator.
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.
Additional Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. Additional display options, such as anchor or formatting tags, may be entered here as either HTML or Idoc Script.

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

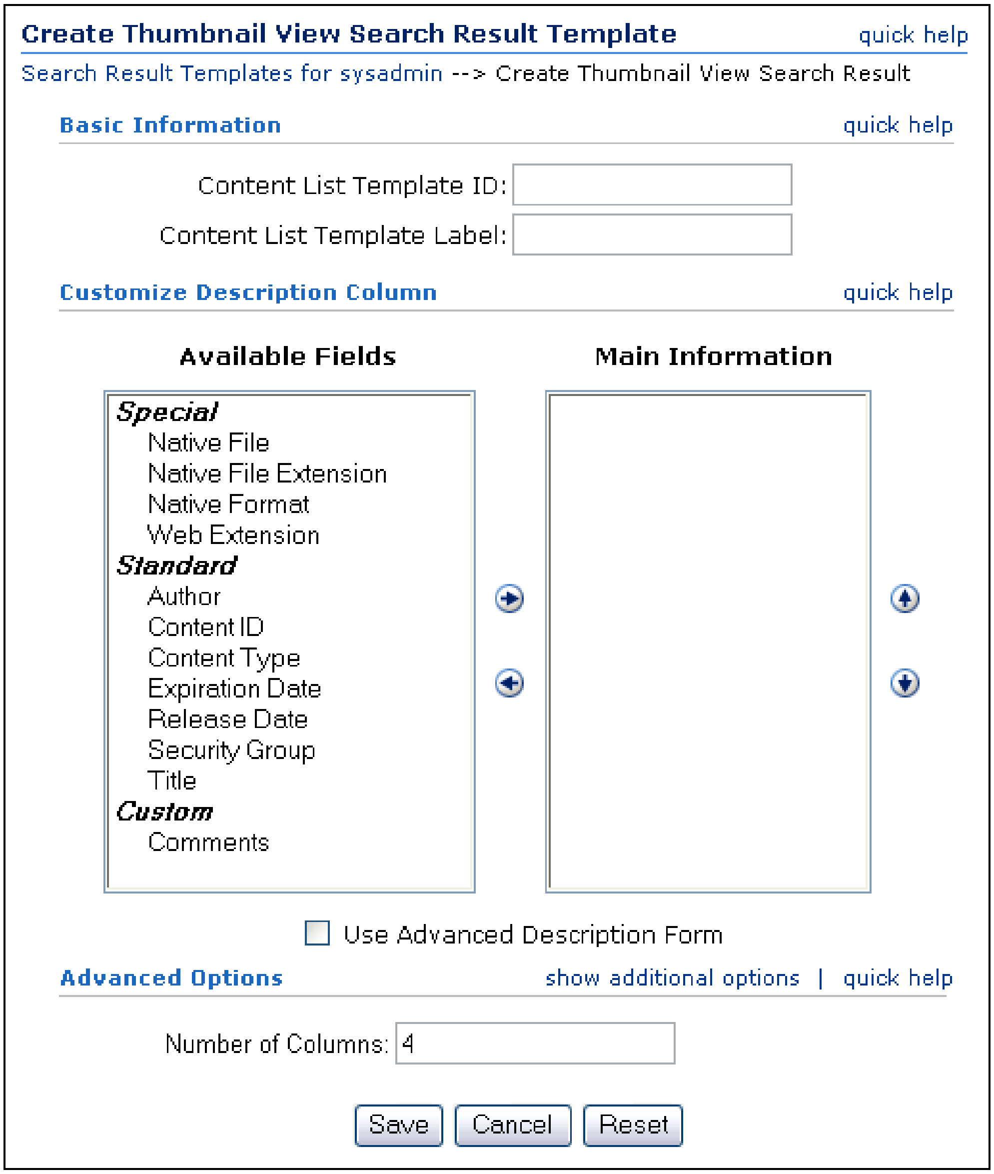
3.9.9 Headline View Advanced Options

The following are the headline view advanced options and their respective descriptions.

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

3.9.10 Create/Edit Thumbnail View Search Result Template Page

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



This page is accessed by clicking the **Add Item** icon in the Actions column of the Thumbnail View option on the Search Result Templates for 'User' Page.

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

There are three main areas of this page:

- Thumbnail View Basic Information
- Thumbnail View Customize Description Column
- Thumbnail View Advanced Options

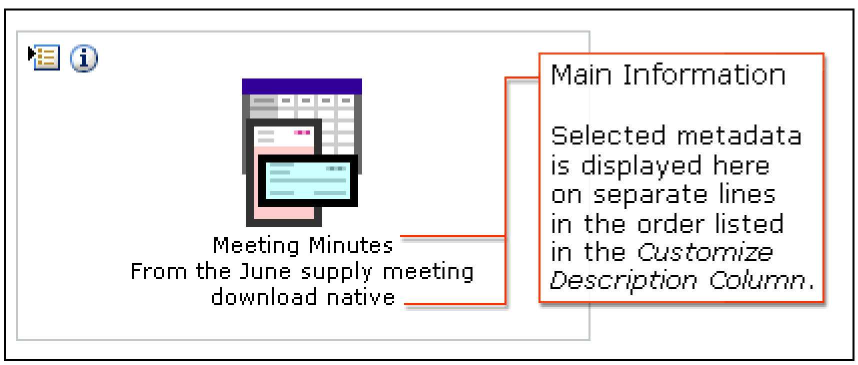
3.9.11 Thumbnail View Basic Information

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

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

3.9.12 Thumbnail View Customize Description Column

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



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

3.9.13 Thumbnail View Advanced Options

The following table lists the thumbnail view advanced options:

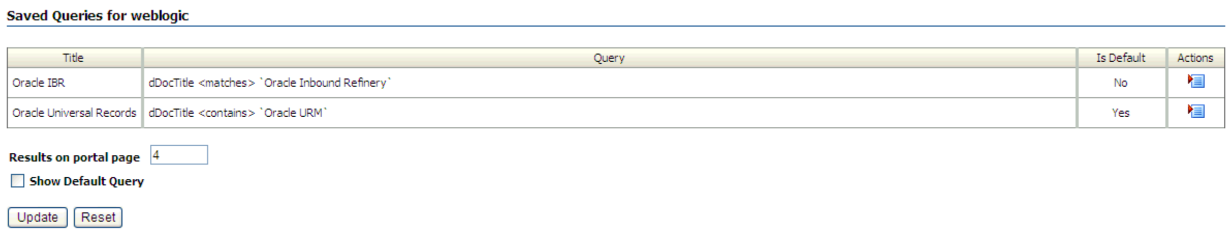
Item	Description
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page is displayed.
Number of Columns	Specifies the number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

3.9.14 Saved Queries Page

The Saved Queries page is used to modify and delete the saved queries that are displayed in your portal navigation bar.

To access this page, click **My Saved Queries** under the My Content Server Tray in the Portal Navigation Bar.

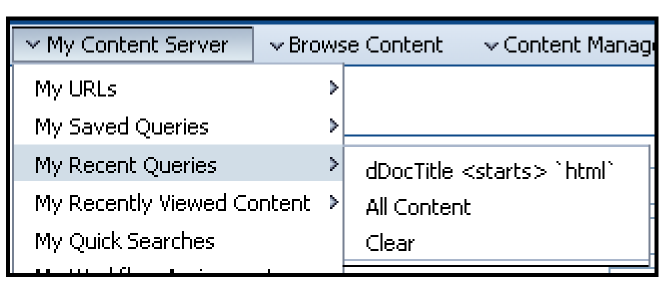
Note: For information about how to save a query link in your portal navigation bar, see "Saving a Query" on page 4-27.



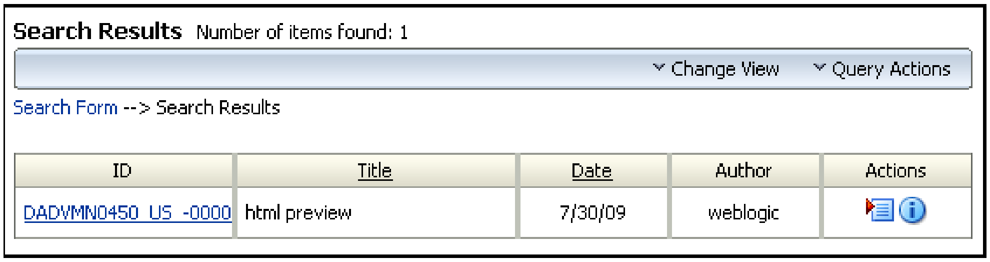
Element	Description
Title column	Lists the titles of the queries you have saved.
Query column	Lists the queries you have saved.
Is Default column	Specifies whether a query is the default query, which will be displayed in a different color in the portal navigation bar if the **Show Default Query** check box is selected.
Actions column	Contains a menu you can click to select an action to take on the query, such as **Set As Default**, **Edit**, or **Delete**.
Results on portal page field	Indicates the number of content items for the default query that will be displayed on the portal page (home page) if the **Show Default Query** check box is selected.
Show Default Query check box	Select this check box to display the results of the selected default query on the portal page (home page). The default query link will be displayed in a different color in your portal navigation bar.
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.

3.9.15 My Recent Queries

The My Recent Queries link is used to view a list of the most recent search queries you have made. To access this list, click **My Recent Queries** under the My Content Server Tray in the Portal Navigation Bar.



Selecting one of the list items re-executes the query and displays the applicable Search Results page. Then, when you re-select the My Recent Queries option, the re-executed query is displayed at the top of the list because it is the most recent.

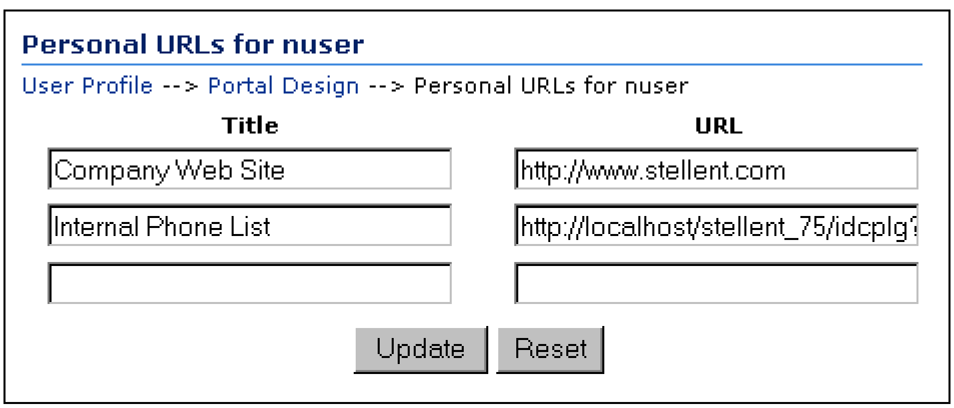


3.9.16 My Recently Viewed Content

The My Recently Viewed Content link is used to view a list of the most recent Content Information Pages you have viewed. To access this list, click **My Recently Viewed Content** under the My Content Server Tray. Selecting one of the list items opens that Content Information page.

3.9.17 Personal URLs for User Name

The Personal URLs for *user_name* page is used to save links to web sites in your portal navigation bar. To access this page, click **My Urls** under the My Content Server Tray in the Portal Navigation Bar.



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

4

Finding Content Items

Oracle Content Server uses a database set up by your system administrator to keep track of the metadata entered when a content item is checked in. If your system administrator has configured the Oracle Text Search option or the database full-text search capability, then the text of content items is indexed and made available for searching as well.

Check with your system administrator to see which search solution or database is being used and whether full-text indexing is enabled.

This chapter covers the following topics:

4.1 Options for Finding Content Items

Your Content Server can be configured with the either the Oracle Text Search option or the Database Metadata Search and Database Full-Text Search options for finding content items:

- Searching with Oracle Text Search

  If you have a license to use Oracle Text Search (in Oracle Database 11*g*) or Oracle Secure Enterprise Search 11*g*, the Oracle Text Search option enables the use of those technologies as the primary full-text search engine for Oracle Universal Content Management.

  If the system administrator configured Oracle Text Search, this option enables you to find a content item or items based on information about the file, actual text in the file, or both. The system administrator can also configure Oracle Secure Enterprise Search (Oracle SES) as the back-end search engine for Oracle Text Search.

- Searching with Database Metadata Search

  This option enables you to find a content item or items based on information about the file. The database metadata search is available if the system administrator did not configure the Oracle Text Search option.

- Searching with Database Full-Text Search

  This option enables you to find a content item or items based on the actual text in the file. The database full-text search is available if the system administrator configured it.

One of these search engines is configured by setting the configuration variable `SearchIndexerEngineName` or in the post-installation configuration page for Oracle UCM, by selecting the internal/external full text search. The configuration variables `MaxIndexableFileSize` (default 10 MB) and `MinIndexableFileSize` (default 5 BM) control whether a file is full-text indexed, based on size.

You can also search for content by navigating to it through an hierarchical link structure that your system administrator set up, as described in "Browsing to Content" on page 4-16.

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

4.2 Searching with Oracle Text Search

The Oracle Text Search option enables the use of Oracle Text 11*g* as the primary full-text search engine for Oracle Universal Content Management (Oracle UCM) 11*g*. Oracle Text 11*g* offers state-of-the-art indexing capabilities.

With Oracle Text Search, noise words cannot be searched because they are ignored while searching, so the "all of the words" term should not be used. Instead, you should use essential extracted text.

Oracle Text Search can filter and extract content from different document formats in different languages. It supports a large number of document formats, including Microsoft Office file formats, Adobe PDF, HTML, and XML. It can render search results in various formats, including unformatted text, HTML with term highlighting, and original document format.

If your system administrator has configured the Oracle Text Search option, you can select options to filter the results of a search by categories and specify full-text searches as well as metadata searches.

This section covers the following topics:

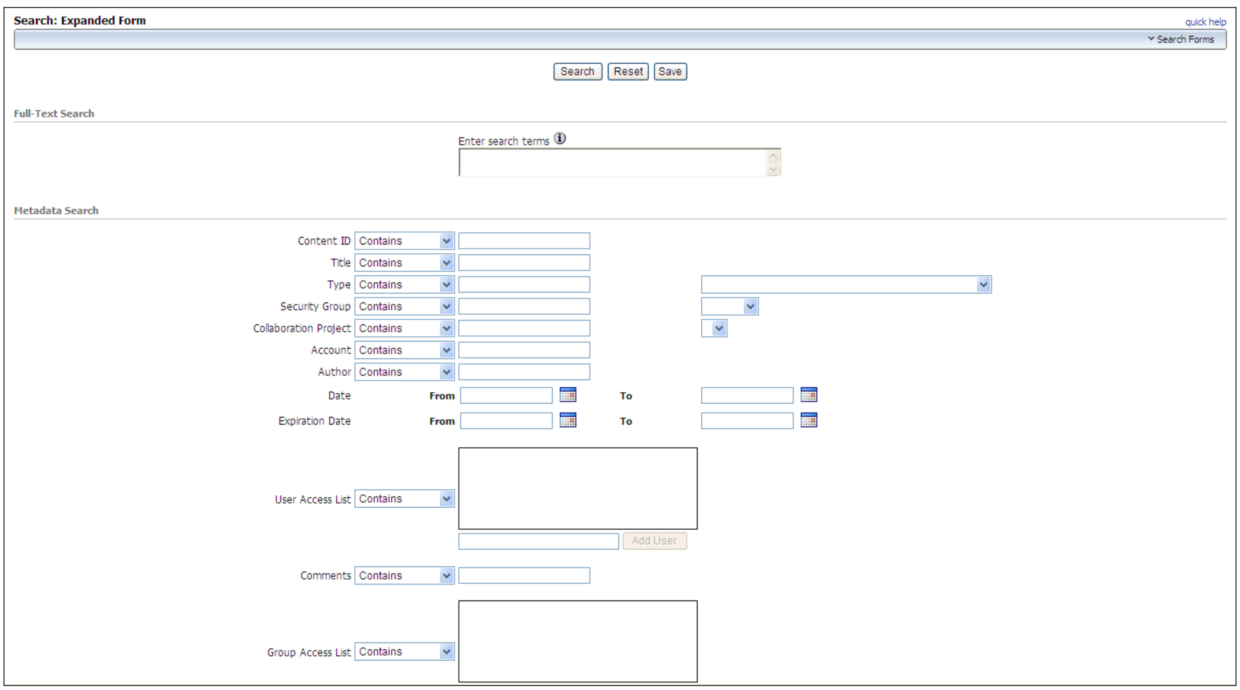
- "Specifying a Search on the Expanded Form" on page 4-3
- "Specifying a Search on the Query Builder Form" on page 4-5
- "Metadata Search Operators for Oracle Text Search" on page 4-6
- "Metadata Wildcards" on page 4-7
- "Searching for Expired Content" on page 4-8

4.2.1 Specifying a Search on the Expanded Form

On the Expanded Form, you can specify a metadata search, a full-text search, or both to identify a content item or items to search for. Also, you can specify result options.

Figure 4–1 shows part of the Expanded Form for specifying Oracle Text Search queries.

Figure 4–1 Expanded Form for Oracle Text Search



To specify a search on the Expanded Form:

1. On the Oracle Content Server home page, display the Home Page Search Fields from the **Search** menu or the Search Tray.
2. In the Metadata Search area of the Expanded Form, you can enter one or more search criteria for metadata fields:
   - Select the appropriate Metadata Search Operators for Oracle Text Search.
   - Use Metadata Wildcards as necessary.
   - Oracle Text Search is always case insensitive.
3. In the Full-Text Search area, you can enter text to search for in a content item or items, to refine your search.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter free-form metadata queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form. For more information, see"Specifying a Search on the Query Builder Form" on page 4-5.

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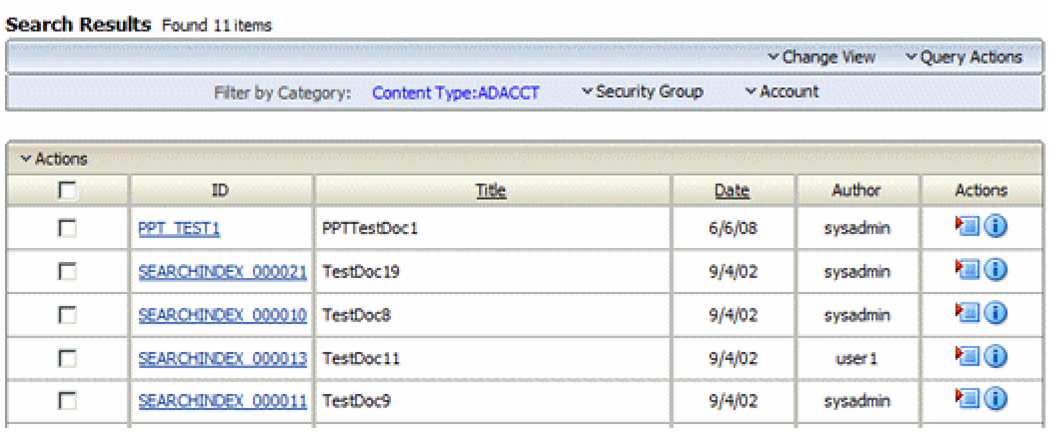
4. In the Results Options area, you can change the Results Options for displaying the results.
5. To save the search query under **My Saved Queries**, click **Save**.
6. To run the search query, click **Search**.

The content item or items that match your search criteria are displayed on the Search Results Page.

The Search Results Page displays a menu bar with options that enable users to selectively view search results. The options represent categories used to filter the search results. These options can be context sensitive, so if only one content item is returned for an option, then it shows only the one result in the menu itself, as Figure 4–2 shows. The default set of options include content type, security group, and account.

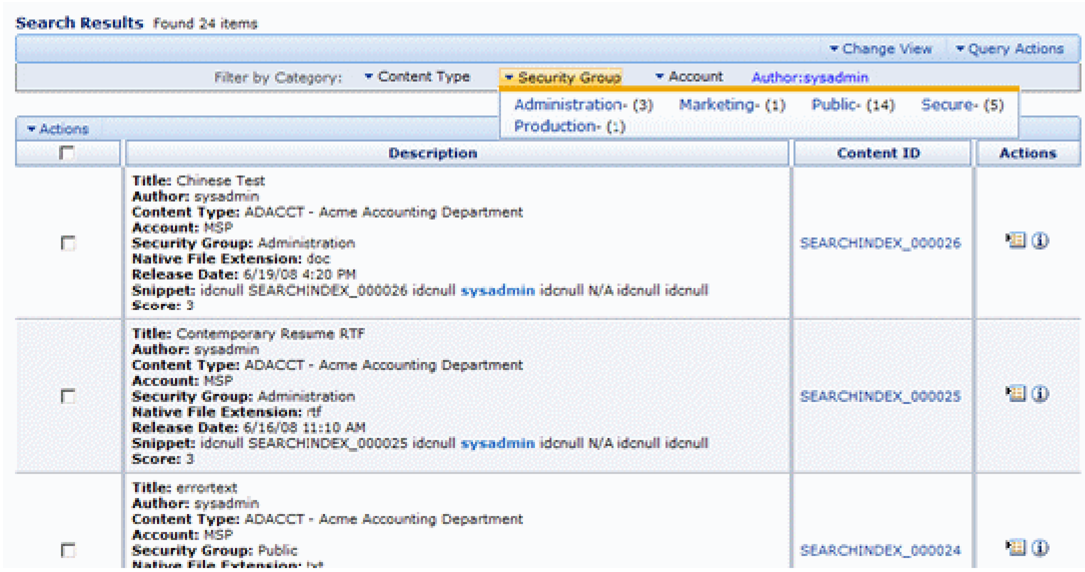
Figure 4–2 Search Results with Oracle Text Search Default Menu



If more than one content item is found for an option, an arrow is displayed next to the option name. When you move your cursor over the option name, a menu will display the list of the categories found in the search results for that option and the number of content items for each of the categories. You can click any category name on the menu to change the Search Results Page to list only the items that match the category.

Figure 4–3 shows a list of categories under Security Group and the number of items found in each category.

Figure 4–3 Search Results with Expanded Oracle Text Search Menu



Element	Description
Filter by Category	Displays the categories used to filter the search results; for example, Content Type, Security Group, Account. The system administrator can use the Content Server Configuration Manager to add categories to this list or remove them. If you want to change the categories used to filter the search results, see your system administrator.
Content Type	(Default) Lists the types and the number of each type of content items in the search results. Clicking one of the content type names will change the search results list to show only those items that match the content type.
Security Group	(Default) Lists the security groups and number of content items assigned to each group in the search results. Security groups include Administration, Public, and Secure. Clicking one of the security group names will change the search results list to show only those items that match the security group.
Account	(Default) Lists the account types and number of items assigned to each account in the search results. Clicking one of the account types will change the search results list to show only those content items that match the account.

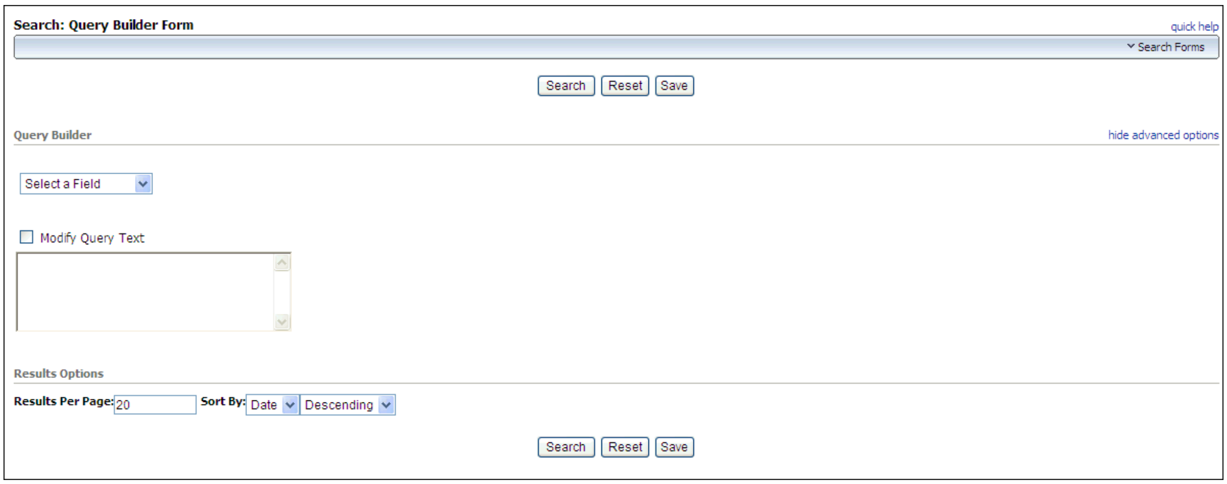
4.2.2 Specifying a Search on the Query Builder Form

On the Query Builder form, you can select search criteria from menus as required. The Query Builder form enables you to build and save complex queries by selecting options from a series of lists and to manually edit the query text.

> **Note:** When using Oracle Text Search with your Content Server instance, you cannot enter free-form metadata queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form. For more information, see"Specifying a Search on the Query Builder Form" on page 4-5.

Figure 4–4 shows the Query Builder Form for specifying Oracle Text Search queries.

Figure 4–4 Query Builder Form for Oracle Text Search



To specify a search on the Query Builder Form:

1. On the Oracle Content Server home page, display the Home Page Search Fields from the **Search** menu or the Search Tray.
2. On the **Search Forms Menu**, select **Query Builder Form**.
3. To edit the query, click **show advanced options**, and then select **Modify Query Text**.
4. In the Results Options area, you can change the Results Options for displaying the results.
5. To save the search query under **My Saved Queries**, click **Save**.
6. To run the search query, click **Search**.

4.2.3 Metadata Search Operators for Oracle Text Search

On the Advanced Search Page, search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in lists to the left of each field.

The following table describes the search terms used and provides examples for use.

Operator	Description	Example
CONTAINS	Finds content items with the specified whole word or phrase in the metadata field. This is available only for Oracle Text Search, or for Oracle Database and Microsoft SQL Server database with the optional DBSearchContainsOpSupport component enabled. See your administrator for more information.	When *form* is typed in the Title field, the search returns items with the word *form* in their title, but does not return items with the words *performance* or *reform*.
MATCHES	Finds items with the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items with the exact title of *address change form*. A query that uses the MATCHES operator on a nonoptimized field will behave the same as a query that uses the CONTAINS operator. For example, if the `xDepartment` field is not optimized, then the query `xDepartment MATCHES 'Marketing'` will behave like `xDepartment CONTAINS 'Marketing'`, returning hits on documents that have an `xDepartment` value of `'Marketing Services'` or `'Product Marketing'`.
HAS WORD PREFIX	Finds all content items with the specified word at the beginning of the metadata field. No wildcard character is placed before or after the specified value.	If you type *form* in the Title field, the search will find all content items with the word *form* at the beginning of their title but will not find a content item whose title begins with the word *performance* or *reform*.

4.2.4 Metadata Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. You can use wildcards in metadata searches, even when using the Quick Search field.

The following wildcards can be used in metadata search fields:

- An asterisk indicates zero or many alphanumeric characters. For example:
  - *form** matches *form* and *formula*
  - **orm* matches *form* and *reform*
  - **form** matches *form*, *formula*, *reform*, and *performance*
- A question mark **(?)** indicates one alphanumeric character. For example:
  - *form?* matches *forms* and *form1*, but not *form* or *formal*
  - *??form* matches *reform* but not *perform*

Note: If you want to search for an asterisk (`*`) or a question mark (`?`) without treating it as wildcard, you need to put quotation marks around your search term; for example: `"here*"`

4.2.5 Searching for Expired Content

By default, if you have write permission to any security group, you can access the Expired Content Page and perform a search for expired content. However, the search results will display only the content for which you have at least read permission.

This section covers the following topics:

- "Searching for Expired Content" on page 4-8
- "Searching for Content About to Expire" on page 4-8

4.2.5.1 Searching for Expired Content

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

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

   The Expired Content Page is displayed.
4. In the Find Expired Content area, select **Before** or **After** from the choice list.
5. Enter a date in the empty field. You can type in the date or select a relative date from the choice list.
6. Click **Get Expired**.

   The Search Results Page displays all content that expired before or after the specified date.

4.2.5.2 Searching for Content About to Expire

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

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

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

   The Search Results Page displays all content that will expire within the specified time period.

4.2.6 Setting Up Oracle SES to Use with Oracle Text Search

Oracle UCM 11*g* with the Oracle Text Search option can be configured to use Oracle Secure Enterprise Search (Oracle SES) 11*g* as its back-end search engine. If Oracle SES is configured to work with Content Server and Oracle Text Search, you can search multiple content servers for a file. Oracle SES 11*g* enables a secure, high quality, easy-to-use search across all enterprise information assets.

To set up Oracle SES to use with Oracle Text Search

1. After installing Oracle SES, edit the file *ORACLE_HOME*/network/admin/sqlnet.ora to comment out the following two lines:

   ```
   tcp.invited_nodes
   tcp.validate_checking
   ```

2. Shut down Oracle SES (the middle tier as well as the database) if it is already running:

   ```
   ORACLE_HOME/bin/searchctl stopall
   ```

3. Start the database:

   ```
   ORACLE_HOME/bin/searchctl start_backend
   ```

4. Find the database connection information in the following file:

   ```
   ORACLE_HOME/search/webapp/config/search.properties
   ```

5. Run the Repository Creation Utility (RCU) against SES and create an OCSEARCH schema.

   To create this schema, you need to select **Oracle Content Server 11g - Search Only** on the RCU Select Components screen. For more information about running RCU, see "Creating Oracle Enterprise Content Management Suite Schemas" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*.

For more information about Oracle SES, see *Oracle Secure Enterprise Search Administrator's Guide*.

4.3 Searching with Database Metadata Search

This section covers the following topics:

4.3.1 About Metadata Searching

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

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

Note: When searching for metadata, case sensitivity will vary depending on how your system administrator has configured Content Server. See your system administrator for your specific configuration.

When you use full-text searching, a search is case sensitive for metadata and case insensitive for full text. For Content ID, however, lowercase letters are converted to uppercase letters, so you cannot search Content ID with lowercase letters.

4.3.2 Performing a Metadata Search

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

1. Display the Home Page Search Fields or the Search Tray.
2. Enter your search criteria in the Expanded Form.
   - Select the appropriate Metadata Search Operators for a Database Metadata Search.
   - Use Metadata Wildcards as necessary.
   - Keep Metadata Search Case Sensitivity in mind.
3. Select the Results Options for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the Search Results Page.

4.3.3 Metadata Search Operators for a Database Metadata Search

On the Advanced Search Page, search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in lists to the left of each field.

The following table describes the search terms used and provides examples for use.

Operator	Description	Example
Substring	Finds content items with the specified string anywhere in the metadata field. This has the same effect as placing a wildcard before and after the search term. This is the default operator. This operator is not available for implementations that use Oracle Text Search.	When *form* is typed in the Title field, the search returns items with words such as *forms*, *performance*, and *reform* in their title.
Matches	Finds items with the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items with the exact title of *address change form*.
Starts	Finds items with the specified value at the beginning of the metadata field. This has the same effect as placing a wildcard after the search term when using the Matches operator.	When *form* is typed in the Title field, the search returns all items with titles that begin with the word *form*, including *forms*, *forming*, and so on.

Operator	Description	Example
Contains	Finds items with the specified whole word or phrase in the metadata field. This is available only for Oracle Text Search, or for Oracle Database and Microsoft SQL Server database with the optional DBSearchContainsOpSupport component enabled. See your administrator for more information.	When form is typed in the Title field, the search returns items with the word *form* in their title, but does not return items with the words *performance* or *reform*.
Ends	Finds items with the specified value at the end of the metadata field. This has the same effect as placing a wildcard before the search term when using the Matches operator.	When *form* is typed in the Title field, the search returns all items with titles that end with the word *form*, such as *form*, *perform*, *chloroform*, and so on.
Not Substring	Finds content items that do not have the specified string anywhere in the metadata field.	When *form* is typed in the Title field, the search returns items without words such as *forms*, *performance*, and *reform* in their title.
Not Matches	Finds items that do not have the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items without the exact title of *Address Change Form*.

4.3.4 Metadata Search Case Sensitivity

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

Note: See your system administrator for your specific configuration.

- **Microsoft SQL Server:** If the content server is using database searching with Microsoft SQL Server, metadata searches can be case sensitive or insensitive, depending on how the database is setup.
- **Oracle Database**: If the content server is using database searching with Oracle Database, metadata searches are always case sensitive. This is in contrast to full-text searches, which are not case sensitive when Oracle Database searching is used.
- **IBM DB2**: If the content server is using database searching with IBM DB2, metadata searches are case sensitive.

4.3.5 Metadata Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. You can use wildcards in metadata searches, even when using the Quick Search field.

The following wildcards can be used in metadata search fields:

- An asterisk indicates zero or many alphanumeric characters. For example:
  - *form** matches *form* and *formula*
  - **orm* matches *form* and *reform*
  - **form** matches *form*, *formula*, *reform*, and *performance*

- A question mark **(?)** indicates one alphanumeric character. For example:
  - *form?* matches *forms* and *form1*, but not *form* or *formal*
  - *??form* matches *reform* but not *perform*

4.3.6 Searching for Expired Content

By default, if you have write permission to any security group, you can access the Expired Content Page and perform a search for expired content. However, the search results will display only the content for which you have at least read permission.

This section covers the following topics:

- "Searching for Expired Content" on page 4-12
- "Searching for Content About to Expire" on page 4-12

4.3.6.1 Searching for Expired Content

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

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

   The Expired Content Page is displayed.
4. In the Find Expired Content area, select **Before** or **After** from the choice list.
5. Enter a date in the empty field. You can type in the date or select a relative date from the choice list.
6. Click **Get Expired**.

   The Search Results Page displays all content that expired before or after the specified date.

4.3.6.2 Searching for Content About to Expire

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

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

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

   The Search Results Page displays all content that will expire within the specified time period.

4.4 Searching with Database Full-Text Search

This section covers the following topics:

- "About Full-Text Searching" on page 4-13
- "Full-Text Search Rules" on page 4-13
- "Full-Text Search Case Sensitivity" on page 4-14
- "Full-Text Search Wildcards" on page 4-14
- "Oracle Database Full-Text Search Options" on page 4-15
- "Performing a Full-Text Search" on page 4-16

4.4.1 About Full-Text Searching

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

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

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

See "Full-Text Search Rules" on page 4-13 for more information.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

4.4.2 Full-Text Search Rules

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

- You can use wildcards in full-text search queries.
- You can use search operators in full-text search queries.

  For more information, see Section 4.4.5.1, "Oracle Database Full-Text Search Operators."
- Internet-Style Search Syntax is supported for full text searching.
- When you perform a full-text search, the search finds the word you specify **and** words that have the same "stem". For example, searching for the word *address* finds files with the word *address*, *addressing*, *addresses*, and *addressed* in them. If you want to limit the search to the word you specify, place the word in double quotes (for example, *"address"*).

- You can sort full-text search results by the number of occurrences of the search terms and the proximity of the search terms when an operator such as <NEAR> is used. Select the **Score** option from the Sort By list on the Search Results Page.

> **Note:** You can only sort the results using the **Score** option if you are using the Oracle 11g database search solution and have installed the Oracle Text Search option.

4.4.3 Full-Text Search Case Sensitivity

Case sensitivity for full-text searches varies depending on how your system administrator has configured the content server. By default, full-text searches with Oracle Database are not case sensitive. Full-text searches with Microsoft SQL Server vary based on how the database is setup.

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

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

4.4.4 Full-Text Search Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. You can use wildcards in metadata searches, even when using the Quick Search field.

With Microsoft SQL Server, a wildcard can be used only for prefix searches.

The following wildcards can be used in metadata search fields:

- An asterisk indicates zero or many alphanumeric characters. For example:
  - *form** matches *form* and *formula*
  - **orm* matches *form* and *reform*
  - **form** matches *form*, *formula*, *reform*, and *performance*
- A question mark **(?)** indicates one alphanumeric character. For example:
  - *form?* matches *forms* and *form1*, but not *form* or *formal*
  - *??form* matches *reform* but not *perform*

4.4.5 Oracle Database Full-Text Search Options

This section includes these topics:

- "Oracle Database Full-Text Search Operators" on page 4-15
- "Oracle Database Full-Text Highlighting" on page 4-15

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

4.4.5.1 Oracle Database Full-Text Search Operators

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

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

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

4.4.5.2 Oracle Database Full-Text Highlighting

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

4.4.6 Performing a Full-Text Search

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

1. Display the Quick Search Field, Home Page Search Fields, Search Tray, or Advanced Search Page.
2. Enter your search terms in the full-text search field.
   - Take the Full-Text Search Rules into account.
   - Keep Full-Text Search Case Sensitivity in mind.
3. Select the Results Options for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the Search Results Page or in the Results Tab under the Search Tray in the Portal Navigation Bar.

> **Note:** When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

4.5 Browsing to Content

This section covers the following topics:

- "Browsing Content to Find a File" on page 4-16
- "Browse Content Tray" on page 4-16

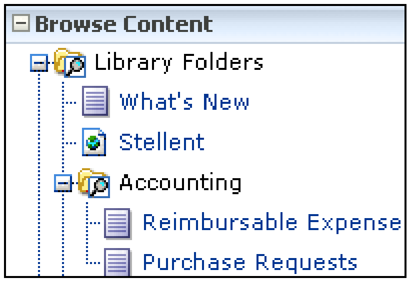
4.5.1 Browsing Content to Find a File

Use the following procedure to find information by browsing content:

1. Click the Browse Content Tray in the portal navigation bar to expand the tray.
2. Scan the list of folders until you find the one you are looking for.
3. Click the plus sign (+) next to the folder to expand the folder contents and continue drilling down through the folders until you reach a link to one of the following:
   - Search Results Page
   - A different web site
   - A content server report

4.5.2 Browse Content Tray

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



4.5.2.1 Library Folders

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

- A list of content items that match the folder's metadata and that you have permission to view
- A web site
- A report that provides information about content items, users, metadata fields, or other content server elements.

4.6 Using Additional Search Capabilities

This section covers the following topics:

- "Internet-Style Search Syntax" on page 4-17
- "Complex Queries and Alternate Query Formats" on page 4-18

4.6.1 Internet-Style Search Syntax

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

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

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

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

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

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

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

4.6.2 Complex Queries and Alternate Query Formats

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

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

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

Query	Interpreted As
dDocTitle:New	`dDocTitle <contains> `New``
dDocTitle:New product	(dDocTitle <contains> \`New\`) <AND> <ftx>\`product\`</ftx>
dDocTitle:New dDocTitle:product	dDocTitle <contains> \`New\` <AND> dDocTitle <contains> \`product\`
dDocTitle:New,dDocTitle:product	dDocTitle <contains> \`New\` <AND> dDocTitle <contains> \`product\`
dDocTitle:New dDocType:Presentations	dDocTitle <contains> \`New\` <AND> dDocType <contains> \`Presentations\`
dDocTitle:New,dDocType:"Test Plan"	dDocTitle <contains> \`New\` <OR> dDocType <contains> \`Test Plan\`

4.7 Search Pages

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

- Quick Search Field
- Home Page Search Fields
- Search Tray
- Advanced Search Page
- Query Builder Form

4.7.1 Quick Search Field

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

You or your system administrator can also build custom searches targeted to search one or more metadata fields you specify, and make them available through the Quick Search field. Targeted searches can be created using either the Query Builder Form or Expanded Form.

Internet-style search syntax is supported in the Quick Search field, as is complex construction and alternate query formats. For more information, see "Using Additional Search Capabilities" on page 4-17.

4.7.2 Home Page Search Fields

The Home Page Search Fields enable you to perform a metadata search, full-text search, or a combination of both from the content server Home Page. Only the most commonly used search fields are available from the home page.

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

4.7.3 Search Tray

The Search Tray enables you to perform a metadata, full-text, or combination search from the content server's Portal Navigation Bar. Only the most commonly used search fields are available from the Search tray.

The Criteria Tab on the Search Tray displays a form where you can enter your criteria. The Results Tab displays the results that are returned.

4.7.4 Advanced Search Page

The Advanced Search Page enables you to perform a metadata search, full-text search, or a combination of both on all available fields.

To access this page, click the **Advanced link** under the Search Tray or use the **Search** menu on the Toolbar.

The expanded form on the Advanced Search Page displays all search fields available to you on a single page. You can alternate between the expanded form and the query builder form using the **Search Forms** menu at the top of the search page.

Using a Content Profiles link under the My Content Server Tray to check in or search for content can help you define and display the most critical metadata fields necessary for those tasks.

Your User Profile enables you to specify which form is displayed by default on the Advanced Search page. See "User Profile Page" on page 3-10 for more information.

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

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

4.7.5 Query Builder Form

The Query Builder Form is used to create and save complex queries by selecting options from a series of lists. After a query is built you can edit the query directly, perform the search, or save the query for easy access from My Saved Queries.

Queries built using the Query Builder form allow you the choice of separating the metadata fields with either the <AND> operator or the <OR> operator. If the <AND>

operator is entered, then each search criteria entered into each field must be met for a result to be returned.

If the <OR> operator is entered, then only one of each field's criteria must be met. For example, if "January" is entered into the Title field and "presentation" is entered into the Type field, separated by <OR>, then a result is returned if content has either "presentation" as the type or has "January" in the title.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

4.8 Working with Search Results

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

The Results Options area of the Advanced Search Page is used to control the display of the Search Results Page.

This section covers the following topics:

- "Displaying Search Results" on page 4-21
- "Changing the Search Results View" on page 4-22

4.8.1 Displaying Search Results

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

1. Display the Home Page Search Fields or Advanced Search Page.
2. Scroll down to the Results Options.
3. Set **Results Per Page** to the maximum number of content items that you want to display on each Search Results Page.
4. Specify the **Sort By** method and order.
5. Click **Search**.
6. Click on the Actions choice list on a Search Results Page and select the desired view option to specify the search results view.

Notes:

- The **Clear** button clears the search fields, but does not clear the Results Options settings.
- For information about changing the defaults for sort field, sort order, and result count, see"Editing Your User Profile" on page 3-8.
- The system administrator can use the Content Server Configuration Manager to add or remove sortable fields. If you want to change the fields available for sorting, see your system administrator.

4.8.2 Changing the Search Results View

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

1. Display the User Profile Page.
2. Scroll down to **Search Template** option.
3. Click the Search Template choice list and select the desired search result view.
4. Click **Update**.

4.9 Searching Referenced Links (optional)

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

- Lists of links using specific search criteria
- Detailed information about a specific link
- The links to other documents for a specific content item, and any documents that reference this item

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

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

This section covers the following topics:

- About Searching Links
- "Link References on the Content Information Page" on page 4-23
- "Notification of Expiration" on page 4-24
- "Performing a Link Search" on page 4-25
- "Checking Content Item Link References" on page 4-25
- "Checking the Link Info of Specific Links" on page 4-26

4.9.1 About Searching Links

The Search Links Page is used to search for links, using criteria stored in the content server repository database. This page is useful for finding valid or invalid links, to determine where a resource is being used, to determine how deleting a content item would affect other documents linking to it, and so on.

The Link Search Results Page displays items matching your search criteria. Invalid or broken links are listed in bold font. Each item has an Item Actions Menu and an Info icon which displays a Link Info Page.

4.9.2 Link References on the Content Information Page

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

- **Show**: By default, the links are hidden when the Content Information page opens. Clicking the **Show** option displays all applicable links. If this content item contains one or more references to other documents, then these links are listed in the Links Contained in This Content Item section. If this content item is referenced by other documents, then these links are listed in the Links to This Content Item section.
- **Hide**: Clicking the **Hide** option closes the Links Contained in This Content Item section and the Links to this content item section and hides the links.

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

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

Clicking the **References** toggle switch enables you to hide or display link references.

Clicking **Show** opens the References sections that list all applicable links associated with the content item. For information about accessing the Content Information page and displaying the references, see "Checking Content Item Link References" on page 4-25.

Links that are invalid or broken are listed using bold font. Clicking the **Info** link in the Actions column displays the Link Info Page for that particular link.

When the References sections are open, the **Hide** toggle switch option is activated. Clicking **Hide** closes the References sections and hides the lists of links.

4.9.3 Notification of Expiration

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

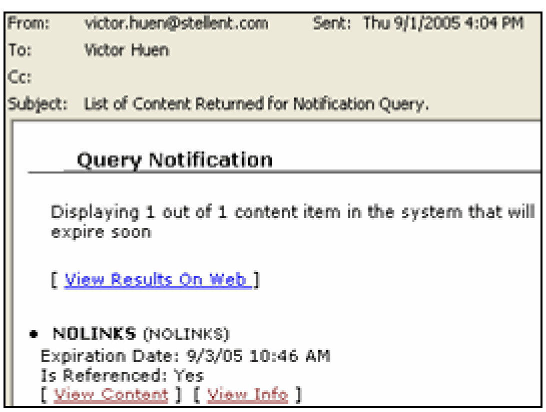
- Is Referenced: Yes
- Is Referenced: No

The e-mail does not provide a list of the content items that reference the soon-to-expire document. This information is available in the References section on the Content Information page. For more information, see "Checking Content Item Link References" on page 4-25.

E-mail notifications for expiring content items are sent if the applicable Content Server configuration variable (`EnableExpirationNotifier`) has been enabled. For more information about setting this configuration variable, see "EnableExpirationNotifier" in the *Oracle Fusion Middleware Idoc Script Reference Guide*. When this variable is enabled, an e-mail notification is sent to each author.

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

Figure 4–5 Notification of Expiration E-mail for Author



To have a separate e-mail notification sent to the system administrator, you can configure the `NotifyExtras` variable as follows:

```
NotifyExtras=sysadmin
```

4.9.4 Performing a Link Search

To search for links in content items:

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

4.9.5 Checking Content Item Link References

Use the Content Information page to display, check, and verify all the link references associated with a specific content item. You can access the Content Information page:

- "Checking Link References from the Content Server's Search Results Page" on page 4-25
- "Checking Link References from the Link Manager's Search Links page" on page 4-25

4.9.5.1 Checking Link References from the Content Server's Search Results Page

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

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

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

4.9.5.2 Checking Link References from the Link Manager's Search Links page

1. Open the Search Links page and search for links. See "Performing a Link Search" on page 4-25 for details.
2. Select a link from the Search Results section.
3. Click the **Content Info** icon in the Actions column.

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

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

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

4.9.6 Checking the Link Info of Specific Links

Use the Link Info page to view additional information about a specific link. You can access the Link Info Page for any link from:

- "From the Content Server's Content Information page" on page 4-26
- "From the Link Manager's Search Links page" on page 4-26

4.9.6.1 From the Content Server's Content Information page

1. Open the Content Information page for a specific content item and display the applicable links. See "Checking Content Item Link References" on page 4-25 for details.
2. Select a link from one of the lists in the References sections (either Links contained in this content item or Links to this content item).
3. Click the corresponding **Info** link in the Actions column.

   The Link Info page for the selected link is displayed.

4.9.6.2 From the Link Manager's Search Links page

1. Open the Search Links page and search for links. See "Performing a Link Search" on page 4-25 for details.
2. Select a link from the Search Results section.
3. Click the **Actions** icon in the Actions column. The Item Actions Menu is displayed.
4. Select the **Link Info** menu option.

   The Link Info page for the selected link is displayed.

4.10 Saving Queries

This section covers the following topics:

- "About Saved Queries" on page 4-26
- "Saving a Query" on page 4-27

4.10.1 About Saved Queries

To quickly display search results for searches that you perform often, you can save links to those searches in the My Saved Queries folder under the My Content Server Tray in the Portal Navigation Bar.

After you save a query link, you can modify or delete the link from your Saved Queries Page.

4.10.2 Saving a Query

Use the following procedure to save a search as a query link in your Portal Navigation Bar:

1. Specify the search criteria you want to save.
   - On the Search Tray, Home Page Search Fields, or Advanced Search Page, enter the search criteria in the desired fields.
   - On the Search Results Page, the criteria saved will be the criteria that were used to display the results.
2. Select **Save Search** from the Actions choice list on the Search Results Page.

   A prompt dialog is displayed.
3. Enter a title for the saved query. This is the link that will be displayed in your Portal Navigation Bar.
4. Click **OK**.

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

> **Note:** See "Editing Saved Queries" on page 3-10 for information about modifying and deleting saved queries.

4.11 Finding Recent Queries

Oracle Content Server saves queries that you recently performed in the My Recent Queries folder under the My Content Server Tray in the Portal Navigation Bar.

You can rerun or clear queries from the My Recent Queries folder.

4.11.1 Rerunning a Recent Query

Use the following procedure to rerun a recent query from your Portal Navigation Bar.

To rerun a recent query:

1. Open the My Recent Queries folder under the My Content Server Tray in the Portal Navigation Bar.
2. Double-click the link for the recent query that you want to rerun.

   The output from the query displays on your Search Results Page.

4.11.2 Clearing Recent Queries

Use the following procedure to clear all recent queries from your Portal Navigation Bar.

To clear recent queries:

1. Open the My Recent Queries folder under the My Content Server Tray in the Portal Navigation Bar.
2. Double-click the **Clear** link.

   Oracle Content Server deletes all links except **Clear** from the My Recent Queries folder.

4.12 Content Data Tracking and Reporting

Content Tracker and Content Tracker Reports are components that are automatically installed with Content Server, but are disabled by default. They are separate modules but, when enabled, they work together to provide information about system usage. This section covers the following topics:

- "About Content Tracker" on page 4-28
- "About Content Tracker Reports" on page 4-28

4.12.1 About Content Tracker

Content Tracker monitors your system and records information about various activities. This information is collected from various sources, then merged and written to a set of tables in your Content Server database. You can customize Content Tracker to change or expand the types of information it collects. Content Tracker monitors activity based on:

- Content item accesses:

  Content Tracker gathers information about content item usage. The data is obtained from Web filter log files, the Content Server database, and other external applications such as portals and web sites. Content item access data includes dates, times, content IDs, current metadata, user names, and profile information about users.

- Content Server services:

  Content Tracker tracks all services that return content, as well as services that handle search requests. And, with a simple configuration change, Content Tracker can monitor literally any Content Server service, even custom services.

4.12.2 About Content Tracker Reports

After Content Tracker extracts data and populates applicable database repository tables, the information is available for report generation. Content Tracker Reports enables you to do these tasks:

- Generate reports:

  Content Tracker Reports queries the tables created by Content Tracker and generates summary reports of various kinds of activities and the usage history of particular content items. The reports help you analyze specific groups of content or users based on metadata, file extensions, or user profiles. You can use the pre-defined reports that are provided, customize them to suit your installation, or use a compatible third-party reporting package.

- Optimize content management practices.

  You can also use the reported data for content retention management. That is, depending on the access frequency of particular content items during specific time intervals, you may decide to archive or delete some of the items. Similarly, applications can use the data to provide portlets with the top content for particular types of users.

This section covers the following topics:

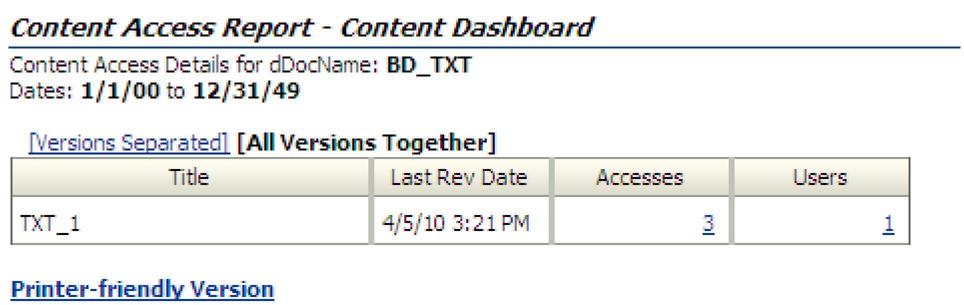
- "Content Access Reports" on page 4-29
- "Content Dashboard Feature" on page 4-29
- "Drill Down Report Feature" on page 4-29

4.12.2.1 Content Access Reports

Each report produced using the Content Tracker Report Generator main page has the same general format and visual layout. Only users that actually request and open content items are included in the Content Tracker Report Generator's compiled results. The opened content item can be the web location file (the absolute path to the content item), an HTML version (by using Dynamic Converter), or the actual native file. Users that open only the Content Information page are not included in the tracked data. There is generally a one-day delay from the time that a user accesses a content item until that information is included in the Content Tracker Report Generator's access history results. For more information, see "Content Tracker Interface" on page A-83.

4.12.2.2 Content Dashboard Feature

When a generated query report contains an active link to a specific content item, clicking the link displays the corresponding Content Dashboard. The content dashboard in the following screen capture shows that one version of a particular content item was accessed three times by one user. In this view, the revision access results are shown together.



4.12.2.3 Drill Down Report Feature

There are various levels of report results that are generated for each predefined report. Depending on the search criteria you enter on the Content Tracker Report Generator main page, the results are filtered accordingly. The top level reports are summary reports and provide very general information. You can use the links on the top level reports to drill down to more specific information.

5 Working with Files

This section covers the following topics:

5.1 Understanding a File's Life Cycle

This section covers the following topics:

5.1.1 Revision Life Cycle

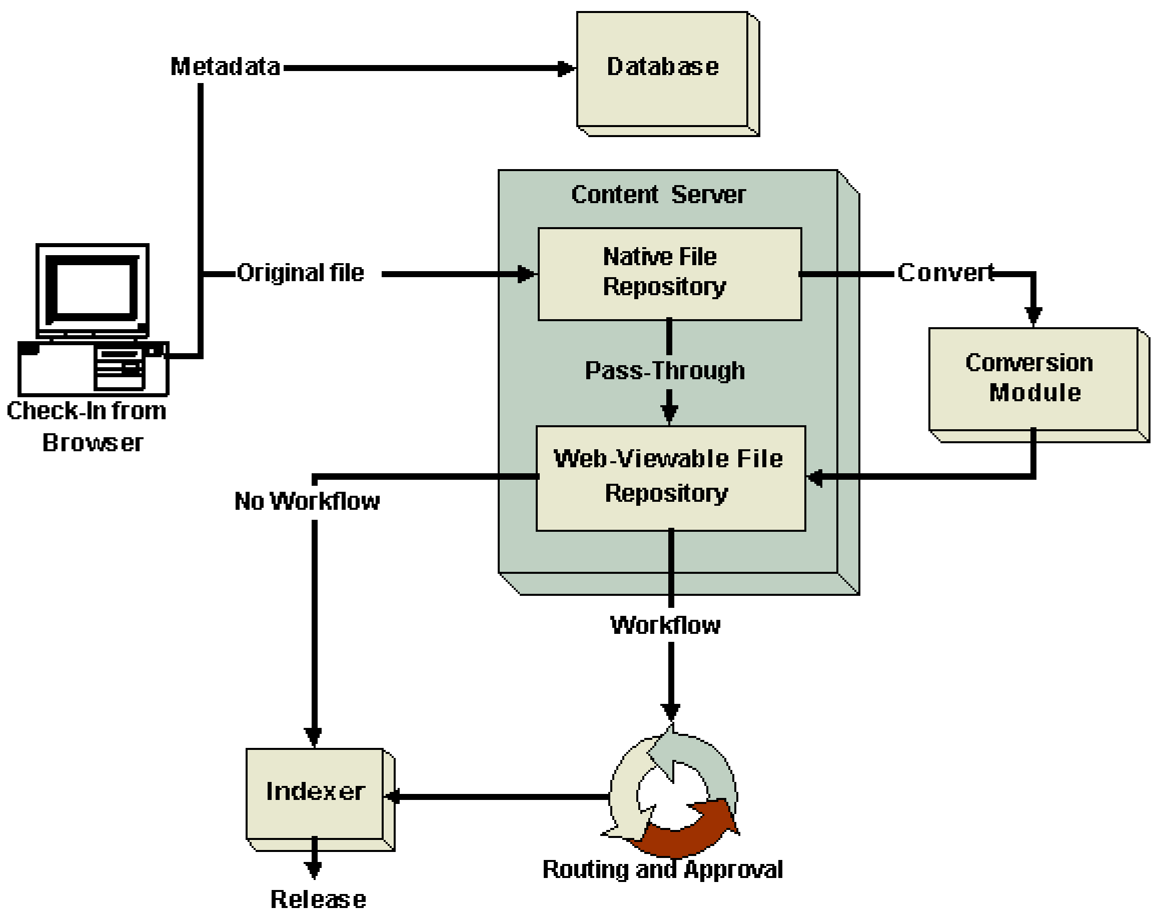
This section describes the process that a file goes through to become a content item revision in Content Server. The same process occurs when you check in a new file and when you check in a revision to an existing content item.

> **Note:** See "Revision Status" on page 5-3 for information on the status of a file at each step in the process.

1. The contributor logs in to Content Server through a web browser and displays a check-in window. This user will typically be the author of the content item.
2. The author specifies the file name, enters information about the file (metadata), and designates security information (security group and account, if enabled).
3. Upon check-in, a copy of the native file goes into the native file repository, and the file's metadata is saved to the content information database.
4. If a conversion product is set up for the specified file format, the file is converted to a web-viewable format (for example, PDF). If the file cannot be converted, it is "passed through" as is (that is, unconverted).

5. If the file was converted, the converted file is stored in the web-viewable file repository. If the file was passed through in unconverted form, a copy of the native file is stored in the web-viewable file repository.
6. If the file's metadata meets the criteria for an enabled workflow, it goes through the workflow process.
7. When the file meets all of the following criteria, the file contents or its metadata only are indexed in the web-viewable file repository:
   - Successful conversion or pass through
   - Approval at all steps of a workflow (if any)
   - Release date is reached
8. On the content item's release date, the file becomes available in the content server.
   - The content item can be found by browsing through the defined hierarchical link structure (the "Library"), or by searching for metadata or specific text.
   - When users view the content item, they can retrieve the web-viewable file, the native file, and/or the metadata.

Figure 5–1 Revision Life Cycle



5.1.2 Revision Status

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

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

5.1.3 Determining the Revision Status

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

1. Click the **Content Management** tray in the Portal Navigation Bar.
2. Click **Work In Progress**.

   The Work In Progress Page is displayed
3. If the content item you are looking for is listed, the status is shown next to the content ID.
4. If the content item you are looking for is not listed, it could be released (that is, have the Released status) or it could be in a workflow. Display the Content Information Page for the content item. The revision status is shown in the Status field.

5.2 Viewing Content Information

The content information page is used to view metadata and other information about a specific content item.

Use any of the following procedures to view the Content Information Page for a content item:

- From the Search Results Page, click the **Info** icon to view the Content Information page for that file.
- From the Search Results Page, click the **Action** icon to open a contextual menu and choose Content Information.
- From the Check-In Confirmation Page, click the **Content Info** link to view the Content Information Page for the file you just checked in.

5.3 Working with File Revisions

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

This section covers the following topics:

- "Viewing the Revision History" on page 5-4
- "Deleting Revisions" on page 5-4

5.3.1 Viewing the Revision History

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

- From the Content Information Page for a content item, scroll to the bottom of the page to view the Revision History

5.3.2 Deleting Revisions

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

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

---

1. Display the Content Information Page for the content item.
2. In the Revision History section, click the **Delete** button for the revision you want to delete.

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

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

5.4 Content Item Metadata

This section covers the following topics:

- "Updating Metadata" on page 5-4
- "Recategorizing Metadata" on page 5-5

5.4.1 Updating Metadata

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

- Change the metadata while checking in a revision to the file. For details see "Checking In a Revised File" on page 6-5.
- Update the metadata without creating a new content item revision. For details see "Updating Metadata" on page 5-4.

Use the following procedure to update content item metadata:

1. Display the Content Information Page for the revision you want to update.
2. Select **Update** from the **Content Actions** menu.

   The Info Update Form is displayed.
3. Change the metadata fields as necessary.

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

4. Click **Submit Update**.

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

5.4.2 Recategorizing Metadata

When enabled, the Content Categorizer component can be used to suggest metadata values for documents being checked into Content Server, and can be used to recategorize the metadata of documents that are already in Content Server. The metadata values are determined according to search rules provided by the system administrator.

To categorize or recategorize documents, Content Categorizer can operate in Interactive mode. In this mode, Content Categorizer is integrated with the Content Check In form in Content Server. Users click the **Categorize** button on either form to run Content Categorizer on a single content item. Any value that is returned by Content Categorizer is a suggested value, because the contributor can edit or replace the returned value.

5.5 Viewing a File

This section covers the following topics:

- "About Viewing a File" on page 5-5
- "Viewing a Web-Viewable File" on page 5-5
- "Viewing a Native File" on page 5-6

5.5.1 About Viewing a File

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

5.5.2 Viewing a Web-Viewable File

To view the web-viewable rendition of a file, you must have the appropriate helper application or web browser plug-in installed. For example, to view the PDF version of a file, you must have the Adobe Acrobat plug-in.

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

- From a Content Information Page, click the **Web Location** link.
- From a Search Results Page, click the **Content ID** link in the ID column (Headline view) or Description column (Classic View), or the thumbnail (Classic and Thumbnail views).

If a web-viewable file does not exist, or you do not have the correct helper application or plug-in installed, you will be prompted to either save the file or open it in its native application. For details see "Viewing a Native File" on page 5-6.

5.5.3 Viewing a Native File

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

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

- From a Content Information Page, click the **Get Native File** link.
- From a Check-Out Confirmation Page, click the **Native File Link**.
- From a Workflow Review Notification Message, click the **Native File** link.

5.6 Discussing Content

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

This section covers the following topics:

5.6.1 About Discussion Posts and Threads

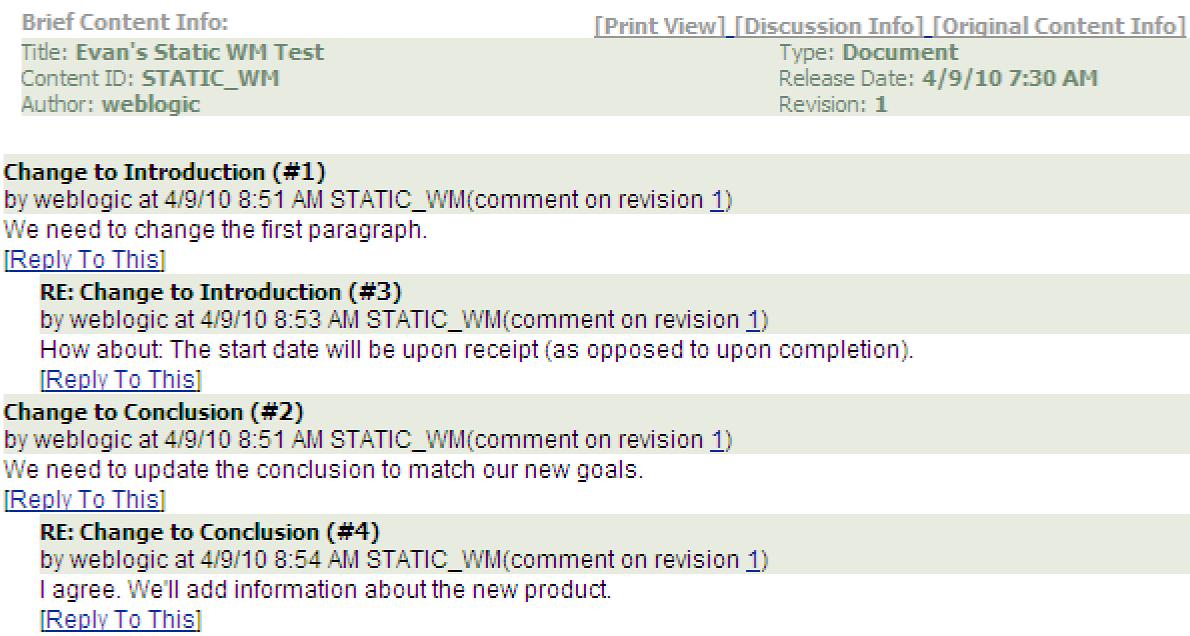
Threaded discussions enable users to track thoughts, record how and why changes were made to content, and make notes when content is in a workflow. Because threaded discussion posts follow content through multiple revisions and refer to the revision for which the comment was made, threaded discussions can be used to help contributors keep track of enhancement requests or other recommendations for future changes to the content. Each discussion post conveniently lists the revision number of the content to which it refers, so you do not need to view the content information of previous revisions in order to post to a discussion item.

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

Figure 5–2 Threads and Posts

In Figure 5–2, each top-level post represents a thread. Posting number one (#1) and posting number two (#2) are threads. The reply (#3) to thread number two represents a post within a thread.

Figure 5–3 Posting Order



The number of the post represents the chronological order in which the comments were posted. Figure 5–3 shows posts #1, #2, #3 and #4. The reply to "Change to Introduction (#1)", "RE: Change to Introduction (#3)", was made after "Change to Conclusion (#2)".

5.6.2 Initiating a Discussion from the Content Information Page

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

1. From the main menu, click **New Check In**. The Content Check-In Form is displayed.
2. Check in the content item with the desired criteria. On the Check-In Confirmation Page, click the **Content Info** link. The Content Information Page is displayed.

> **Note:** If you have a content item that has a document name that is within 1 of the database storage maximum, which is 30 by default, you cannot create a threaded discussion for it.

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

5.6.3 Initiating a Discussion from the Search Results Page

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

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

1. From the main menu, click **Search**. The Advanced Search Page is displayed.
2. Enter any search metadata fields to narrow your search, and click **Search**. For example, selecting ***Discussion Type=Not applicable***, prevents your search results from displaying content items that are discussions. Your search results are displayed.
3. In the **Content Actions** menu for the content you want to discuss, click the **Create Discussion** link in the popup menu. The Post Comment Form is displayed.
4. Enter a subject for the posting in the **Subject** box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Form (Brief Content Info page) displays the new post.

5.6.4 Initiating a Discussion from the Workflow Review Page

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

To initiate a discussion about a workflow document:

1. Open your My Content Server Tray and click the **My Workflow Assignments** link. The Workflow in Queue Page is displayed.
2. In the Actions column, click the Workflow Review icon. The Workflow Review Page is displayed.
3. In the Links list, click the **Create Discussion** link. The Post Comment Form is displayed.
4. Enter a subject for the posting in the **Subject** box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Form (Brief Content Info page) displays the new post.

5.6.5 Viewing a Threaded Discussion

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

- The **ID of the content item to discuss** link on the Content Information Page
- The **Discuss This Item** link on the Workflow Review Page or Search Results Page page
- The **Web Location** link on the Discussion Info Page
- The **Content ID** link of a discussion on the Search Results Page

The Discussion link indicates how many discussion posts have been created for the document. The number of items is generated by the Discussion Count custom information field.

To view a discussion thread, perform the following steps:

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

5.6.6 Replying to a Posting

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

To reply to a post, perform the following steps:

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

5.6.7 Printing a Threaded Discussion

Use this procedure to print a threaded discussion.

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

5.6.8 Deleting a Threaded Discussion

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

To delete a discussion:

1. In the Search results page, click the **Content Item info** link for the discussion you want to delete. The Discussion Info Page is displayed.
2. Click **OK**. A message indicates the revision has been successfully deleted from Content Server.

5.6.9 Searching with the Discussion Type Field

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

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

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

5.6.9.1 Searching for Content that is a Discussion

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

To search for content that is a discussion:

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

5.6.9.2 Searching for Content that is not a Discussion

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

To search for content that is not a discussion:

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

5.7 Subscribing to New Revisions of a Content Item

This section covers the following topics:

- "About Subscriptions" on page 5-12
- "Subscribing to a Content Item" on page 5-12
- "Viewing Your Current Subscriptions" on page 5-12
- "Unsubscribing from a Content Item" on page 5-13
- "Unsubscribing from a Criteria Group" on page 5-13

5.7.1 About Subscriptions

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

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

  For example, the system administrator sets up a criteria subscription with ***Author*** as the criteria. Whenever you view a Content Information Page, you can choose to subscribe to all content items checked in by the author of the current content item.

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

5.7.2 Subscribing to a Content Item

Use the following procedure to subscribe to a content item:

1. Display the Content Information Page for the content item that you want to subscribe to.
2. Select **Subscribe** from the **Content Actions** menu. If the item is part of a criteria group, the Subscribe To "Item" Page is displayed
3. Click **Subscribe** under the Subscribe To This Item section.
4. If no e-mail address has been specified in your User Profile Page, you are prompted to enter an e-mail address for this subscription. Enter an e-mail address and click **OK**.

5.7.3 Viewing Your Current Subscriptions

Use the following procedure to view your current subscriptions:

- Open the My Content Server Tray and select **My Subscriptions**.

  The Subscriptions Page is displayed, listing all of your current subscriptions.

5.7.4 Unsubscribing from a Content Item

Use the following procedure to unsubscribe from a file:

1. Open the My Content Server Tray and select **My Subscriptions**.

   The Subscriptions Page is displayed, listing all of your current subscriptions.

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

5.7.5 Unsubscribing from a Criteria Group

Use the following procedure to unsubscribe from a file:

1. Open the My Content Server Tray and select **My Subscriptions**.

   The Subscriptions Page is displayed, listing all of your current subscriptions.

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

6 Checking In Files

This section covers the following topics:

6.1 About Manual File Check-In

Manual File Check-in is the process of submitting a file to the content server repository. You must have the correct permission to check a file into the content server. This permission is associated with your user name and password, which the system administrator assigns. During the check-in process, you will specify metadata for your file so that the content item can be found by drilling down or by searching. You can check in files and have metadata automatically applied through your desktop application by using Desktop Integration Suite. For more information, see "Setting Metadata To Be Remembered for Form-Based Check-ins" in *Oracle Fusion Middleware User's Guide for Desktop Integration Suite*.

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

6.2 Primary and Alternate Files

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

- **A web-viewable version of the native file.** This is typically used when the native file cannot be converted by the content server, or you want to convert the native file manually.
- **A file in a format that can be converted to a web-viewable file.** This is typically used when the native file cannot be converted by the content server, and you have an alternate file format that can be converted by the system (such as PostScript).

- **A file explaining what the native file contains.** Typical uses include providing a text file that describes the contents of a compressed file (such as a zip file) and supplying documentation for an executable file.

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

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

6.3 Watermarks and File Check-In

This section covers the following topics:

- "About PDF Watermark" on page 6-2
- "Watermark Templates" on page 6-2
- "Content Check-In Form" on page 6-3

6.3.1 About PDF Watermark

PDF Watermark is an optional component that is automatically installed with Content Server. If enabled, this component allows watermarks to be applied to PDF files generated by the PDFConverter component of Oracle Inbound Refinery (Oracle IBR), or to native PDF content in the `weblayout` directory.

There are two types of watermarks: Static and Dynamic. A static watermark is applied to a PDF file during content check-in as a follow-on step to the Oracle IBR conversion. Only documents that are converted by Oracle IBR to PDF can receive a static watermark. After a watermark is applied to a document, all viewers of the document will see the same watermark.

Dynamic watermarks are generated on the fly, when the document is requested for viewing or downloading, and can contain variable information (for example, the user name, date, and time of download). System administrators define rules and set up specific conditions for determining which requested content will get a dynamic watermark. Different users might see the same content with different watermarks.

6.3.2 Watermark Templates

The appearance of a watermark that gets applied to a PDF document is determined by a special kind of template. A watermark template defines the text fields and images used for the watermark and to which pages each field and image can be applied. The template might also enforce certain security measures, such as requiring a password for viewing or printing the watermarked content. The system administrator creates and manages watermark templates.

6.3.3 Content Check-In Form

When you check in certain document formats to the system, they might be automatically converted to PDF for viewing on the web. In such cases, you might be allowed to specify a static watermark template that will be used to apply the static watermark.

To request that a document receive a static watermark, enter the content ID of the template to be used. Your system administrator will provide you with a list of templates that are available and appropriate for your use.

6.4 Checking In Single Files

This section covers the following topics:

- "Checking In a New File" on page 6-3
- "Checking In a Similar File" on page 6-5
- "Checking In a Revised File" on page 6-5

6.4.1 Checking In a New File

Use the following procedure to check in a new file:

1. Click the New Check In link.
2. The Content Check-In Form is displayed.
3. If applicable, enter a unique name in the Content ID field. Content ID values are generated automatically by the content server if your system administrator has enabled this feature. However, you can override an automatically generated content ID by entering a new value.

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

4. From the Type list, select the option that best describes the file.
5. Enter a descriptive title in the Title field.
6. From the Security Group list, select the security group for the content item. Keep in mind that this content item will be available to users who have permission to the specified security group.
7. If accounts are enabled for your system, select an option from the Account list, or enter a new account name. Keep in mind that this content item will be available to users who have permission to the specified account.
8. Specify a **primary file** using one of these methods:
   - Click **Browse** next to the Primary File field. Navigate to and select the native file then click **Open**.
   - Enter the complete path name and file name of the native file in the Primary File field (for example, *c:/My Documents/ABC Project/MyFile.doc*).

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

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

```
c:/placeholder
```

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

---

9. If the Format field is displayed under the Primary File field, select the conversion format for the file.
   - If the Use Default option is selected, Content Server converts the file format based on its file name extension.
   - If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
10. (Optional) Specify an **alternate file** by browsing or entering the path name and file name.
    - The alternate file must have a different file extension than the primary file.
    - The alternate file is typically in a web-viewable format or a format that can be converted to a web-viewable file, such as *.pdf*, *.txt*, *.doc*, and so on.
11. If the Format field is displayed under the Alternate File field and you specified an alternate file, select a conversion format for the file.
    - If the Use Default option is selected, Content Server converts the file format based on its file name extension.
    - If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
12. Accept the default revision in the Revision field. (You should change the revision only if there is a specific reason to do so.)
13. Enter any notes about the file in the Comments field.
14. Use the default release date, or enter a future release date in the Release Date field.
15. If you want the file to be unavailable in the content server on a particular date, enter a date in the Expiration Date field.
16. If applicable, fill in any of your organization's custom metadata fields.
17. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the Check-In Confirmation Page is displayed.

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

6.4.2 Checking In a Similar File

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

Use the following procedure to check in a similar file:

1. From the Check-In Confirmation Page or the Content Information Page of the existing content item, click **Check In Similar**.

   The Content Check-In Form is displayed. Most of the metadata fields will display the same values as those assigned to the existing content item.

2. Continue with step 3 of the procedure for Checking In a New File, changing or adding metadata values and member permissions as necessary.

6.4.3 Checking In a Revised File

Use the following procedure to check in a revised file:

1. Click the My Content Server Tray.
2. Click **My Checked-Out Content**.

   The Checked-Out Content for [User] Page is displayed.

3. Click the Action icon for the appropriate content item to display a contextual menu and select **Check In**. You can now check in the revised file using the procedure for Checking In a New File.

Please note the following considerations:

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

6.5 Checking In Multiple Files

This section covers the following topics:

- "About Multiple File Check-In" on page 6-6
- "Upload Applet Requirements" on page 6-6
- "Checking in Multiple Files Using Upload" on page 6-7

6.5.1 About Multiple File Check-In

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

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

There are two ways to check in multiple files:

- Create a compressed zip file **outside** of Content Server using a compression program such as WinZip or PkZip then check in this zip file as a single file. For details refer to "Checking In a New File" on page 6-3.
- Create a compressed zip file **within** Content Server by selecting the **Upload Multiple Files** check box in the Content Check-In Form. Checking in multiple files using this method is possible if all of the following conditions are true:
  - The system administrator has enabled the upload applet on the content server.
  - The **Enable upload applet** check box is selected in your User Profile Page.
  - You are using a Java-enabled browser.

  For details see "Checking in Multiple Files Using Upload" on page 6-7.

6.5.2 Upload Applet Requirements

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

- The system administrator has enabled the upload applet on the content server.
- The **Enable upload applet** check box is selected in your User Profile Page.
- You are using a Java-enabled web browser.

The upload applet requires permission to access the local drive. When you access the Content Check-In Form for the first time after enabling this applet, you may see a Java security warning:

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

6.5.3 Checking in Multiple Files Using Upload

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

Note: You can also check in multiple files by creating a compressed zip file *outside* of Content Server using a compression program such as WinZip or PkZip, and then checking in the zip file as a single file. For details see "Checking In a New File" on page 6-3.

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1. Make sure that you have enabled the upload applet in your user profile. For details refer to "Editing Your User Profile" on page 3-8.
2. Follow the general procedure for Checking In a New File, Checking In a Similar File, or Checking In a Revised File.
3. Before specifying the primary file or alternate file, select the corresponding **Upload Multiple Files** check box.
4. Click the corresponding **Browse** button.

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

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

   a. Click **Select File**.

      The Select File Window is displayed.

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

      The file is displayed in the Files to Upload list.

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

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

   a. Click **Select Multiple**.

      The Select Files Window is displayed.

   b. To select the drive where the files are located, click **Change Drive**, select the drive on the Change Drive Window, and click **OK**.

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

   d. To select multiple files in the Files list:

      – To select non-contiguous files, hold down the Ctrl key and click on each file.

      – To select contiguous files, hold down the Shift key and click the first and last file.

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

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

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

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

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

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

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

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

8. Follow the general check-in procedure to complete the check-in. For details see "Checking In a New File" on page 6-3.

   If the chunking function is enabled, the Upload Message Screen displays a progress bar during upload.

6.6 Important Considerations

This section covers the following topics:

- "Multi-Byte Characters" on page 6-8
- "Content Profiles" on page 6-8

6.6.1 Multi-Byte Characters

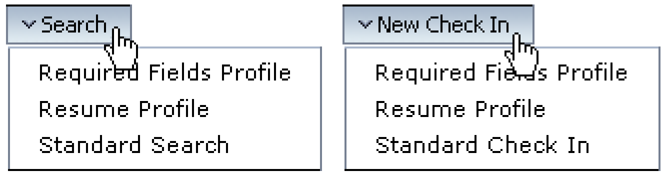
You should not use multi-byte characters (for example, Japanese or Korean) in content IDs and content types, even if Content Server is to be used in a multi-byte environment. The values of these fields are included in the URLs of content items, and limitations in current web technology prevent web servers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

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

6.6.2 Content Profiles

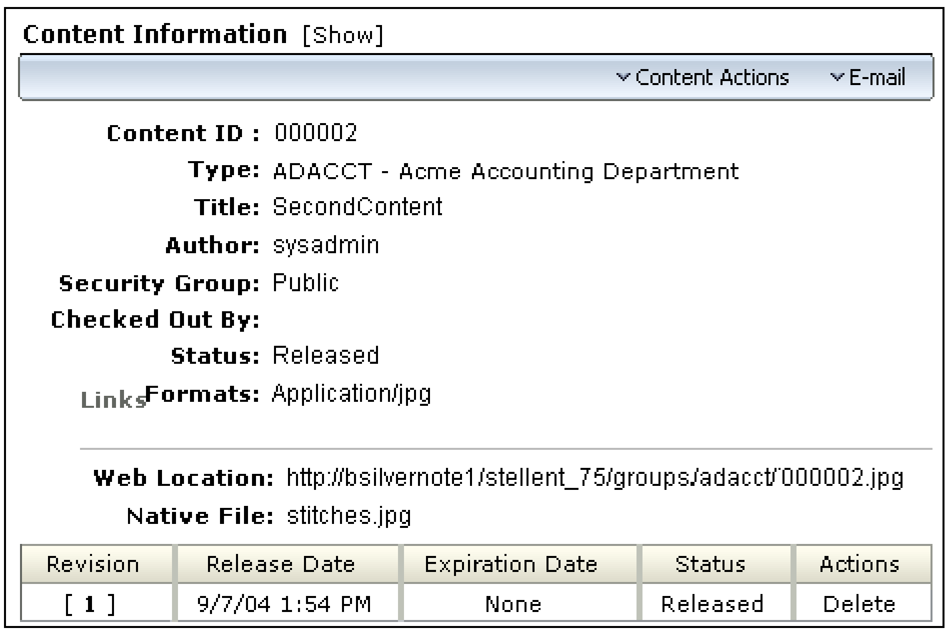
Content profiles are defined by your system administrator, and determine what metadata fields are displayed and how they are grouped and titled on the associated check in, search, and information pages based on rules established by the system administrator. By default, all content profiles are displayed as links under both the Search and New Check In lists on the Toolbar.

Figure 6–1 Content Profile Links Under the Search and New Check In Lists on the Toolbar



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

Figure 6–2 Content Information Page Streamlined by Content Profiles



7

Checking Out Files

This section covers the following topics:

7.1 About Manual File Check-Out

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

There are two approaches to checking out files manually:

- For content items that could be revised by other users, it is a good idea to check out the file as soon as you know that you need to edit it. This prevents other users from checking in a new revision with potentially conflicting changes.
- For content items that are unlikely to be revised by other users, you can make revisions to a copy of the file, check out the content item, and immediately check it back in with the edited file.

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

You can check out files automatically through your desktop application by using Desktop Integration Suite. For more information, see "Checking Out Content Files" in *Oracle Fusion Middleware User's Guide for Desktop Integration Suite.*

7.2 Checking Out Single Files

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

To check out single files from a Content Information page:

1. Display the Content Information Page of the content item you want to check out.
2. Select **Check Out** from the **Content Actions** menu. The Check-Out Confirmation Page is displayed.
3. If applicable, click **Native File Link** to get a copy of the native file.

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

From a Search Results Page

To check out single files from a Search Results page:

1. Search for content to view a search results list.
2. Select **Headline View** or **Thumbnail View** from the **Content Actions** menu.
3. Click the **Action** icon and select **Check Out from the contextual menu**. The Check-Out Confirmation Page is displayed.
4. If applicable, click **Native File Link** to get a copy of the native file.
5. If a dialog window appears before the Save As window, choose to save the file to disk.
6. On the Save As window, navigate to the location where you want to save the file and click **Save**.
7. Start the native application (for example, Word or PowerPoint) and locate the file where you saved it in step 6.
8. Edit the file in its native application and then save the file.

7.3 Using Check Out and Open

When the Check Out and Open component is enabled, which it is by default, you may open content items using the added Check Out and Open option in the item action menu on a search results page, or from the Content Actions menu on a content information page. This opens the item directly in a WebDAV-compliant native application from Content Server. Before using Check Out and Open, verify with your system administrator what WebDAV-compliant applications are in use, and make sure that the content item you are checking out is associated with one of the compliant applications.

This section covers the following topics:

- "About Checking Out and Opening Content" on page 7-2
- "Opening Content from Content Server" on page 7-3

7.3.1 About Checking Out and Opening Content

When you check out and open a content item, the content item opens in its native application if the application is WebDAV-compliant (for example, Microsoft Word). You can edit the content item and check it back into the content server using that application. Each time you save the content item in the native application, a new revision of the item is checked into the content server.

Important: Pay close attention to the status of a content item you attempt to check out using Check Out and Open, both in Content Server and in the native application you are using to edit the file. If you open the file and notice that the title bar designates the file to be Read Only, then it is not available for editing. Any changes you make to the file will not be checked in as a new revision.

Instead, the application prompts you to save the file as a new item on a local file system. A file is designated as Read Only if it is in a workflow process. This does not prevent you from opening the file for viewing or editing as a new item. This is identical to the behavior of opening a file whose properties are set to Read Only on a file system. A content item will not open if it is checked out by another user.

Figure 7–1 Check Out and Open Option on Search Results Page

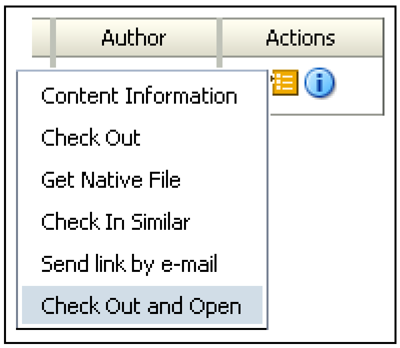
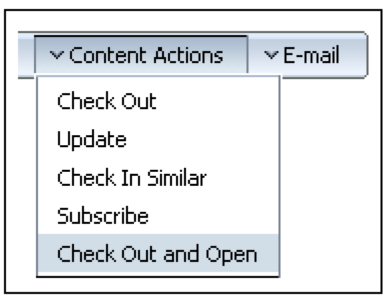


Figure 7–2 Check Out and Open Option on Content Information Page



7.3.2 Opening Content from Content Server

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

To open content from a Content Information page:

1. Display the Content Information Page of the content item you want to check out.
2. Select **Check Out and Open** from the **Content Actions** menu. The content item is checked out from Content Server transparently and opened in a WebDAV compliant native application, such as Microsoft Word.
3. Edit the content item, save the changes and close the file. The content is checked back into Content Server transparently as a new revision.

To open content from a Search Results page:

1. Search for content to view a search results list.
2. Select **Headline View** or **Thumbnail View** from the **Content Actions** menu.
3. Click the **Action** icon and select **Check Out and Open from the contextual menu**. The content item is checked out from Content Server transparently and opened in a WebDAV compliant native application, such as Microsoft Word.
4. Edit the content item, save the changes and close the file. The content is checked back into Content Server transparently as a new revision.

Note: The Check Out and Open options are available in the Content Actions menu of a content item's current revision only.

7.4 Checking Out Multiple Files

This section covers the following topics:

- "About Multiple File Check-Out" on page 7-4
- "Download Applet Requirements" on page 7-4
- "Download Options on Search Results Pages" on page 7-5
- "Downloading Multiple Files" on page 7-5

7.4.1 About Multiple File Check-Out

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

7.4.2 Download Applet Requirements

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

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

- The **Enable download applet** check box is selected in your User Profile Page.
- You are using a Java-enabled web browser.

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

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

7.4.3 Download Options on Search Results Pages

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

Element	Description
Download	This link downloads the selected content items.
Select All check box	Selects all items in the search result list.
Select check boxes	Selects content items to be downloaded when the Download Selected button is clicked.

7.4.4 Downloading Multiple Files

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

1. Locate the files to download by drilling down the hierarchical link structure (the "Library") or by performing a search. For details see Chapter 4, "Finding Content Items".

   The Download Files Screen is displayed.
2. To download all content items on the Search Results page, click **Download All**.
3. To download selected content items, select the corresponding **Select** check boxes and click **Download Selected**.

   The Download Files Screen is displayed.
4. Select the type of file to download: **Web Viewable** or **Native**.
5. To uncompress zip files during the download process, select the **Extract zip file contents** check box.
6. If you selected the Native option and you want to check out the content items upon download, select the **Check out file** check box.
7. In the Download Location field, enter the path where you want the files to be copied. You can click **Browse** and navigate to the directory to select it.
8. If you want a different file name for the downloaded file, change the file name in the Download Location field. This applies only to the current file. If you click **Download All**, all other files will retain their default file names.
9. Click one of the following buttons:
   - **Download**: to download the current file only.
   - **Download All**: to download all selected files that have not been skipped (you will not be prompted for each file that was selected).
   - **Skip**: to not download the current file and go to the next selected file.
   - **Cancel**: to cancel the download.
10. If a file with the same file name already exists in the target location, you will be asked whether you want to overwrite it. Click a button to indicate whether you want to overwrite one or more files.

    When downloading is complete, the Download Results Summary is displayed.
11. Click **OK**.

8

Working with Workflows

This section covers the following topics:

- "About Workflows" on page 8-1
- "Participating in a Workflow" on page 8-3
- "Viewing Workflow Information" on page 8-6

8.1 About Workflows

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

This section covers the following topics:

- "Workflow Types" on page 8-1
- "Workflow Steps" on page 8-1
- "Post-Process Workflow Options" on page 8-2
- "Workflow Process" on page 8-2
- "Workflow Tasks" on page 8-2

8.1.1 Workflow Types

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

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

8.1.2 Workflow Steps

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

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

8.1.3 Post-Process Workflow Options

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

8.1.4 Workflow Process

The workflow process is as follows:

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

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

8.1.5 Workflow Tasks

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

- Entering a File to a Workflow
- Reviewing Revisions in a Workflow
- Working with a Rejected Revision

8.2 Participating in a Workflow

This section covers the following topics:

- "Entering a File to a Workflow" on page 8-3
- "Reviewing Revisions in a Workflow" on page 8-4
- "Working with a Rejected Revision" on page 8-5

8.2.1 Entering a File to a Workflow

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

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

1. Read the Workflow Started Notification message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items Page is displayed.
3. Select **Check Out** from the contextual menu under the Actions column.

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

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

   ---
6. Click **Check In**.

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

8.2.2 Reviewing Revisions in a Workflow

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

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

1. Read the Workflow Review Notification Message message.
2. Click the **Review Workflow Item** link.

   The Workflow Review Page is displayed, indicating the actions that can be performed.

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

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

   The Check-Out Confirmation Page is displayed.
5. Get a copy of the original file and edit it. For details see Chapter 7, "Checking Out Files".
6. Check the content item back in to the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
   - Open the Content Management tray, click **Active Workflows**, click the name of the workflow, then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
7. Fill in the Checked-Out Content Page.
   - If you check the **Approve Revision** box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow when the required number of approvals is reached. Step 8 is not required.
   - If you leave the **Approve Revision** box unchecked, the revision is checked in but remains in Review status instead of moving to GenWWW status. You will still need to approve or reject the revision.
8. Click **Check In**.

9. Approve or reject the revision by clicking the appropriate link in the Workflow Review panel.

   - If the revision is approved by the appropriate number of reviewers, the content item goes to the next step in the workflow.
   - If the revision is rejected, the Reject Content Item Page is displayed so that the reviewer can enter a message explaining the reason for rejecting the content item. When a content item is rejected, it is sent back to the most recent workflow step that permitted contribution.

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

8.2.3 Working with a Rejected Revision

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

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

1. Read the Workflow Content Item Reject Notification message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items Page is displayed.
3. Select **Check Out** from the contextual menu under the Actions column.

   The Check-Out Confirmation Page is displayed.
4. Get a copy of the original file and edit it. For details see Chapter 7, "Checking Out Files".
5. Check the content item back into the system using one of the following methods:

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

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

8.3 Viewing Workflow Information

This section covers the following topics:

- "Workflow Information" on page 8-6
- "Viewing a List of Active Workflows" on page 8-6
- "Viewing a List of Your Workflows" on page 8-6
- "Viewing Workflow History and Information About a Workflow Step" on page 8-6
- "Viewing Content Information" on page 8-7

8.3.1 Workflow Information

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

- Viewing a List of Active Workflows
- Viewing a List of Your Workflows
- Viewing Workflow History and Information About a Workflow Step
- Viewing Content Information

8.3.2 Viewing a List of Active Workflows

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

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

   The Active Workflows Page is displayed.

8.3.3 Viewing a List of Your Workflows

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

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

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

8.3.4 Viewing Workflow History and Information About a Workflow Step

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

1. Display either the Workflow Content Items Page or the Workflow in Queue Page.
2. Select **Workflow Info** from the contextual menu under the Actions column.

   The Workflow Info For Item Page is displayed.

8.3.5 Viewing Content Information

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

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

   The Workflow in Queue Page is displayed.
3. Select **Content Info** from the contextual menu under the Actions column.

   The Content Information Page is displayed.

9

Storing and Moving Content with Folders/WebDAV

This chapter discusses how to store and move content with folders/WebDAV. The chapter contains the following sections:

9.1 Introduction

This section covers the following topics:

9.1.1 About Folders

Folders is an optional component for use with Content Server that, when enabled, provides a hierarchical folder interface to content in Content Server in the form of *virtual folders* (also called *hierarchical folders*). Virtual folders enable you to create a multilevel folder structure.

Virtual folders provide this main benefit: Users can apply default metadata to content items by checking them in through a particular folder.

9.1.1.1 Content Item Security

The user logins and security controls in Content Server also apply to content that is managed through virtual folders. For example, if you have Read permission for a content item, you will be able to view the file, but you will not be able to check in a revision to the file.

9.1.1.2 Folder Metadata Inheritance

When you create a new folder, the metadata from the parent folder will populate the fields for the new folder. This allows the folder to initially *inherit* metadata, but enables you to make changes to the new folder. A folder has the same metadata as a content item.

Subsequent changes to a parent folder's metadata do not affect the metadata for existing subfolders. If you want to apply a parent folder's metadata to subfolders and content items, you can use Metadata Propagation.

9.1.1.3 Default Metadata Values

When a file is checked into the content server through a virtual folder, default metadata values are entered on the content check-in form automatically. Default metadata values are evaluated in the following order:

1. **Virtual folder default values:** When you click New Folder from the New Item menu, any content default metadata values defined for that virtual folder are entered on the content check-in form. These values are defined on the Hierarchy Folder Configuration Page.
2. **User default metadata values:** If any content metadata defaults are not defined for the virtual folder, the user's default metadata values are applied. These values are defined by each user for new content items on their Default Information Field Configuration Page, and for revised content items on their Revision Information Field Configuration Page.

   > **Important:** User default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server web interface.

3. **System default metadata values:** The system default values are applied to any fields that are not defined by the virtual folder or the user's default metadata. These values are defined by the system administrator.

   > **Important:** System default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server web interface.

4. **None:** A metadata field can be blank as long as it is not a required field. If a required field is left blank, an error will occur and the content item will not be checked in.

9.1.1.4 Trash Bin

The *Trash Bin* function is an optional feature that sends deleted items to a Trash folder, rather than permanently deleting the items. Items in the Trash folder can then be permanently deleted or restored to their original location in the folder hierarchy. This enables users to recover files and folders that have been mistakenly deleted.

Please note the following considerations with regard to the Trash Bin feature:

- The Trash folder works much like a normal folder except that items deleted from the Trash folder are permanently deleted. See "Trash Exploring Page" on page A-60.
- Deleting a revision from a content information page bypasses the Trash folder and permanently deletes the revision.
- Users can select whether they want to make use of the Trash folder, or permanently delete items immediately. They can also choose whether to see all deleted items in the Trash folder, or just the items they deleted themselves. See "Folder Configuration Page" on page A-53.
- Deleting an item from the Exploring page will put the item into the Trash folder.
- Deleting an item from WebDAV will put it into the Trash folder.

9.1.1.5 Metadata Propagation

The *metadata propagation* function enables contributors to copy default metadata values from a folder to its subfolders and content items. Typical uses for this function include:

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

Note the following considerations with regard to metadata propagation:

- The propagation function applies each folder's metadata to all "uninhibited" subfolders and content items within those folders. This means that each uninhibited subfolder and content item will inherit the metadata of the folder from which propagation was launched.
- When you inhibit a folder, it is not affected by metadata propagation from a higher-level folder. However, you can still launch metadata propagation *from* an inhibited folder.
- The system administrator selects which metadata fields are included in propagation. (This is a system-wide setting.) By default, no metadata fields are included until they are specifically selected for metadata propagation.
- If a folder metadata field does not have a value defined, subfolders and content items within that folder may not inherit the "blank" value during propagation and any existing metadata values may stay intact for these items. This depends on how the system administrator has set up the system.
- When you launch metadata propagation, only folders and content items for which you have Write permission to the security group will be affected.

9.1.1.6 Folder Content Item Revisions

When documents are edited and checked into the content server, the revised document must undergo a process that involves being converted, indexed, and released. Before this process is complete, the system considers the revised document to be the "latest" version. After the process is complete, the system considers the revised document to be the "latest released" version.

Depending on how Folders has been set up, users with read access to the content item will see either the latest version or nothing at all if the item is not released. Authors, however, will always see the latest version. By default, the latest version is available to all users with read access.

9.1.2 About WebDAV

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

9.1.2.1 What is WebDAV?

WebDAV is an extension to the HTTP/1.1 protocol that allows clients to perform remote web content authoring operations. The WebDAV protocol is specified by RFC 2518.0. See the WebDAV Resources page at `http://www.webdav.org` for more information.

When WebDAV is used with a content management system such as Content Server, the WebDAV client serves as an alternate user interface to the native files in the content repository. The same versioning and security controls apply, whether an author uses the web browser interface or a WebDAV client.

Desktop Integration Suite (DIS) provides a set of embedded applications that help you seamlessly integrate your desktop experience with the WebDAV-based Oracle Content Server repository. DIS provides convenient access to the content server directly from Microsoft Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), and supported e-mail clients (Microsoft Outlook and Lotus Notes). Integrating Oracle Content Server with your desktop applications improves your ability to work with files on the content server. You can easily manage files on the server and share files with other users directly from your desktop in addition to logging in to the content server and using the web browser interface. For more information about DIS, see *Oracle Fusion Middleware User's Guide for Desktop Integration Suite*.

The WebDAV interface in Content Server is based on the hierarchical Folders interface. See "About Folders" on page 9-1 for more information.

9.1.2.2 WebDAV Clients

A WebDAV client is an application that can send requests and receive responses using the WebDAV protocol.

You can use WebDAV virtual folders in Windows Explorer to manage files that were created in a non-WebDAV client, but you cannot use the native application to check content in to and out of the content server repository.

9.1.2.3 WebDAV Connection Strings

With the use of a form-based login, WebDAV connection strings now require the `_dav` root before the webroot. For example:

```
http://host_name:7044/_dav/cs/idcplg/webdav/
```

9.2 Working With Folders

This section covers the following topics:

- "Propagating Metadata" on page 9-12
- "Searching for Content in Folders" on page 9-12

This guide assumes that your content server is using the Trays layout with the Oracle skin, which is the default for Content Server 11gR1.

9.2.1 Naming Folders

The Folders component mimics the Windows file system. Therefore, when you create a folder, you are not allowed to use double quotes in the name (for example, "doublequotedfolder"). Using double quotes will cause an error. You must use the standard naming conventions for Windows when creating folders.

9.2.2 Defining User Configuration Settings

Use the following procedure to define your virtual folder configuration settings:

1. Open the **My Content Server** tray.
2. Click **My Folder Configuration**.

   The Folder Configuration Page is displayed.
3. Select a **Content Style** option.
4. If the Hide/Unhide feature is enabled, select or clear the "Show hidden when browsing" check box.
5. If the Trash Bin function is enabled, select or clear the following check boxes:
   - Remove items immediately when deleted
   - Show only items that user has deleted in trash virtual folder
6. Click **Update**.

9.2.3 Defining User Metadata Defaults for New Content

Use the following procedure to define default metadata values for new content checked in by a particular user.

These defaults will be applied to any new content item checked in through a virtual folder ***only*** if a value is not defined for the folder. See "Default Metadata Values" on page 9-2 for more information.

These metadata values are applied only on initial check-in of a content item. These settings do not affect revisions to existing content. See "Defining User Metadata Defaults for Revised Content" on page 9-6 to set metadata defaults for revisions.

> **Important:** Each user should follow this procedure to define their default metadata before using WebDAV to check in content through a virtual folder. This is recommended to ensure that content items do not all have the same metadata, and to ensure that content can be checked in if required values are not defined for the folder or in the system defaults. Each WebDAV contributor should repeat this procedure after a required metadata field is added to the content server or after accounts are enabled.

To define user metadata defaults for new content:

1. Open the **My Content Server** tray.
2. Expand the **My Folder Configuration** link.
3. Click **Default Information Field Configuration for *[User]***.

   The Default Information Field Configuration Page is displayed.
4. Specify the default values to be applied to new content upon check-in. Idoc Script can be used in any information field.
5. Click **Update**.

9.2.4 Defining User Metadata Defaults for Revised Content

Use the following procedure to define default metadata values for revised content checked in by a particular user. These defaults will be applied to any content item revision checked in through a virtual folder ***only*** if a value is not defined for the folder. See "Default Metadata Values" on page 9-2 for more information.

These metadata values are applied only upon check-in of a revision; these settings do not affect new content items. See "Defining User Metadata Defaults for New Content" on page 9-5 to set metadata defaults for new content.

To define user metadata defaults for revised content:

1. Open the **My Content Server** tray.
2. Expand the **My Folder Configuration** link.
3. Click **Revision Information Field Configuration for *User***.

   The Revision Information Field Configuration Page is displayed.
4. Specify the default values to be applied to revised content upon check-in. Idoc Script can be used in any information field.
5. Click **Update**.

9.2.5 Viewing Virtual Folders

Use the following procedure to view a virtual folder from a content server web page:

1. Open the **Browse Content** tray.
2. Click the **Contribution Folders** link.

   Exploring Contribution Folders is displayed. Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.
3. Click folder links to drill down to the desired folder.
4. To view the Hierarchical Folder Information Page for a folder, click the Folder Information icon, select Folder Information from the Action menu, or explore the folder and click the Info link.
5. If the Web Folder feature is enabled and you are using Internet Explorer 5.0 or higher, you can view the folder in Windows Explorer by selecting **Open Web Folder** from the **Content Actions** menu.

9.2.6 Viewing Content Items

Use the following procedure to view content items from a virtual folder:

1. View the Exploring page for the virtual folder that contains the content item.

   Depending on how the system administrator set up the system, long display lists might be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

   For more information, see "Exploring Contribution Folders" on page A-58.

2. To view the content information for a content item, click the **Information** icon or choose **Content Information** from the Actions icon popup menu.

3. To view a file, click the file link in the Name column.

   - If you selected the Native option under Content Style on the Folder Configuration Page, the File Download screen enables you to open or save the file.

   - If you selected the Web Viewable (Browse only) option under Content Style on the Folder Configuration Page, the web-viewable file is displayed.

9.2.7 Checking In Content

Use the following procedure to check in a file through a virtual folder:

1. View the Exploring page for the virtual folder you want to check the content item into.

   For more information, see "Exploring Contribution Folders" on page A-58.

2. Display the content check-in form using one of the following methods:

   - Select **New Content** from the New Item link.

   - Click the Actions icon for an existing content item and select **Check In Similar**.

   The content check-in form is displayed, with the folder's default metadata already filled in.

3. Enter the required metadata and any optional metadata for the content item.

4. Enter the path and file name of the **Primary File**. You cannot check two files with the same file name into the same folder.

5. In the **Inhibit Propagation** field, specify whether the content item should be included during metadata propagation.

   - Set the value to *false* if propagated metadata should be applied to the content item.

   - Set the value to *true* if the content item's metadata should remain unchanged during metadata propagation.

6. Click **Check In**.

If the number of content items in the folder exceeds the limit set by the system administrator, you receive an error message and will not be able to check in the new content item.

9.2.8 Adding Virtual Folders

To add a virtual folder, you must be a contributor.

Use the following procedure to add a virtual folder:

1. Select **New Folder** from the **New Item** link on the Exploring Folder page:
2. Specify an owner for the virtual folder.
3. Specify any additional metadata values for the folder.
   - These metadata values will be applied to content items upon initial check-in to this folder.
   - These metadata values override any values inherited from the parent folder.
   - Idoc Script can be used in any information field.
4. In the **Inhibit Propagation** field, specify whether the folder should be included when metadata is propagated from a higher-level folder.
   - Set the value to *false* if the folder should be included in metadata propagation.
   - Set the value to *true* if the folder's metadata should remain unchanged during metadata propagation.
5. Click **Save**).

   The new virtual folder is displayed on the Exploring Contribution Folders.

If the number of folders exceeds the limit set by the system administrator, you receive an error message and will not be able to check in the new folder.

9.2.9 Modifying Virtual Folders

To modify a virtual folder, you must have Admin permission to the folder's security group.

Use the following procedure to modify a virtual folder:

1. Open the Hierarchical Folder Information Page.
2. Select **Update** from the **Folder Actions** list.

   The Hierarchy Folder Configuration Page appears.
3. Revise one or more metadata values for the folder.
   - These metadata values will be applied to content items upon initial check-in to this folder; these settings do not affect revisions to existing content in the folder.
   - These metadata values override any values inherited from the parent folder.
   - Idoc Script can be used in any information field.
4. In the **Inhibit Propagation** field, specify whether the folder should be included when metadata is propagated from a higher-level folder.
   - Set the value to *false* if the folder should be included in metadata propagation.
   - Set the value to *true* if the folder's metadata should remain unchanged during metadata propagation.

5. Click **Submit Update**.

   The modified virtual folder is displayed on the Exploring Contribution Folders.

If the number of folders exceeds the limit set by the system administrator, you receive an error message and will not be able to check in the new folder.

9.2.10 Moving Virtual Folders and Content

Use the following procedure to move virtual folders and content items from one virtual folder to another:

1. View the Exploring page for the virtual folder that contains the folders, content items, or both that you want to move.

   For more information, see "Exploring Contribution Folders" on page A-58.

2. Select the check boxes next to the folders and/or content items to be moved.
3. Click item **Actions**, and select **Move**.
4. Click the folder to move the selected items to. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
5. Click **OK**.

   The selected items are moved to the target folder.

If local folder mapping is setup, if you move a file from one folder to another (either through the Folders user interface or WebDAV), the copy of that file in the local folder associated with the source folder is not deleted. For example, if you have a folder *WebSite*, files in this folder are automatically copied to its local folder, *C:/Website/*. If you now move a file from the folder *WebSite* to another folder, say, *Intranet*, with *Z:/Intranet/* as the local folder, then the file copy in *C:/Website/* is not deleted.

9.2.11 Creating a Shortcut

Use either of the following procedures to create a shortcut link to a virtual folder or content item in the folder hierarchy. You can create shortcuts in two ways:

- Creating a Shortcut from an Exploring Page
- Creating a Shortcut from a Folder Information or Content Information Page

9.2.11.1 Creating a Shortcut from an Exploring Page

Use the following procedure to create a shortcut from an exploring page:

1. View the Exploring page for the virtual folder that contains the folder or content item for which you want to create a shortcut.

   For more information, see "Exploring Contribution Folders" on page A-58.

2. Click Folder Actions menu or Content Actions menu, and then click **Create Shortcut**.

   The Browsing Window is displayed.

3. Click the folder where you want to create the shortcut link. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
4. Click **OK**.

   A shortcut link is created in the target folder.

9.2.11.2 Creating a Shortcut from a Folder Information or Content Information Page

Use the following procedure to create a shortcut from a folder information page or content information page:

1. View the Hierarchical Folder Information Page or content information page for the folder or content item for which you want to create a shortcut.
2. Select **Create Shortcut** from the **Content Actions** menu.

   The Browsing Window is displayed.
3. Click the folder where you want to create the shortcut link. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
4. Click **OK**.

   A shortcut link is created in the target folder.

9.2.12 Deleting Virtual Folders and Their Content

This section covers the following topics:

- "About Deleting Folders and Content" on page 9-10
- "Deleting a Folder or Content Item" on page 9-11
- "Permanently Deleting Folders and Content from Trash" on page 9-11

9.2.12.1 About Deleting Folders and Content

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

Keep the following in mind when deleting virtual folders and content items:

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

Trash Bin function enabled by system administrator	"Remove items immediately when deleted" check box on the Folder Configuration Page	Result of Delete Action
Enabled	Cleared	Deleting a folder or content item moves it to the Trash folder. Items can be permanently deleted or restored from the Trash folder.
Enabled	Selected	Deleting a folder or content item permanently deletes it. **Items cannot be restored.**
Disabled	Selected or cleared	Deleting a folder or content item permanently deletes it. **Items cannot be restored.**

- To delete a content item, you must have Delete permission to the content item's security group. If accounts are enabled, you must have Delete permission to the account as well.

- To delete a virtual folder, you must be the owner of the folder or a user with Delete permission to the folder's security group. If accounts are enabled, you must have Delete permission to the account as well.
- If a folder contains any content items or subfolders that you do not have permission to delete, you will not be able to delete the folder.

9.2.12.2 Deleting a Folder or Content Item

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

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

Use the following procedure to delete folders and content items:

1. View the Exploring page for the virtual folder that contains the folder or content item you want to delete.

   For more information, see "Exploring Contribution Folders" on page A-58.
2. Select the check box next to each folder and content item to be deleted.
3. For multiple selections, choose **Delete** from the Actions menu. For an individual selection, choose **Delete** from the Action icon menu.

   You are asked to confirm that you want to remove the selected items.
4. Click **OK**.

   All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are deleted. Whether or not they can be restored depends on how Folders has been set up.

9.2.12.3 Permanently Deleting Folders and Content from Trash

Use the following procedure to permanently delete items from the Trash folder:

1. View the Exploring page for the Trash folder.

   For more information, see "Exploring Contribution Folders" on page A-58.
2. Select the check box next to each folder and content item to be permanently deleted.
3. For multiple selections, choose **Delete** from the Actions menu. For an individual selection, choose **Delete** from the Action icon menu.

   You are asked to confirm that you want to remove the selected items.
4. Click **OK**.

   All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are permanently deleted from the content server. **They cannot be restored.**

9.2.13 Restoring Folders and Content from Trash

If you delete a folder or content item from the Trash folder, the folder or item is permanently deleted from Content Server. To prevent permanent deletion of folders and content, you can restore them from the Trash folder to their original parent folders. Items that remain in the Trash folder are still searchable.

Use the following procedure to restore an item from the Trash folder to its original parent folder:

1. View the Exploring page for the Trash folder.

   For more information, see "Exploring Contribution Folders" on page A-58.

2. Click the **Actions** icon and select **Restore**. (You can restore only one item at a time.)

3. Click **OK**.

   The item is restored to its original parent folder.

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

9.2.14 Propagating Metadata

Use the following procedure to copy metadata from a folder to its subfolders and content items.

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

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

You can only propagate metadata for a folder if you are the owner or administrator of that folder. Empty metadata field values may not be propagated, depending on how the system has been set up.

1. Display the Hierarchical Folder Information Page for the folder from which you want to propagate metadata.

2. Select **Propagate** from the Folder Actions.

   The metadata values defined for the current folder are copied to any uninhibited subfolders and content items within those folders. Only content items and folders for which you have Write permission to the security group will be affected.

9.2.15 Searching for Content in Folders

You Content Server instance might or might not be configured for subfolders. If it is not, then you can still search for items in a single folder. Otherwise, you have the choice to search for content in a folder or the folder and everything below. If there are many subfolders, you might be limited in how many are actually searched.

If Folders is configured to support searching in a folder and its subfolders, then follow this procedure to search for content items in Folders:

1. Click **Search** in the content server.

   The Search page is displayed with a Browse button.

2. Click **Browse** to find and select the folder, including its subfolders, that you want to search.

3. Specify other parameters on the Search page as needed, then click **Search**.

9.3 Working with WebDAV

This section covers the following topics:

- "Setting Up a Web Folder" on page 9-13
- "Working with Virtual Folders" on page 9-13
- "Working with Content" on page 9-15
- "Displaying Web Pages" on page 9-19

9.3.1 Setting Up a Web Folder

See your system administrator for details about the specific documentation available that provides instructions about setting up a WebDAV web folder on a client machine.

9.3.2 Working with Virtual Folders

This section covers these topics:

- Folder Name Constraints
- Viewing Virtual Folders
- Creating a New Virtual Folder
- Deleting a Virtual Folder
- Restoring a Virtual Folder
- Setting Default Folder Metadata

9.3.2.1 Folder Name Constraints

The following characters cannot be used in the name of a virtual folder:

- Forward slash (/)
- Backward slash (\)
- Number sign (#)

9.3.2.2 Viewing Virtual Folders

Virtual folders can be viewed in Windows Explorer or from the Open or Save As dialog in a WebDAV client. The virtual folders can be accessed in either of the following ways:

- Select the Web folder under the My Network Places node
- Expand the Web Folders node under the My Computer node, and then select the Web folder

9.3.2.3 Creating a New Virtual Folder

You can create a new virtual folder in Windows Explorer or from the Open or Save As dialog in a WebDAV client. Select an existing web folder, right-click, and select **New** in the context menu, and then **Folder**.

- The newly created folder will have the same default metadata as its parent folder. To modify the default metadata, see "Setting Default Folder Metadata" on page 9-14.
- You cannot create a new folder at the root level.
- The following characters cannot be used in the folder name:
  - Forward slash (/)
  - Backward slash (\)
  - Number sign (#)
  - Quotation mark (")

9.3.2.4 Deleting a Virtual Folder

You can delete a virtual folder from Windows Explorer or from the Open or Save As screen in a WebDAV client. Browse to the folder you want to delete, right-click, and choose **Delete** from the popup menu (or press the Delete key).

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

See "Deleting Virtual Folders and Their Content" on page 9-10 for detailed information on security and the Trash Bin function.

9.3.2.5 Restoring a Virtual Folder

If the Trash Bin function is enabled, you can restore a virtual folder from Windows Explorer using one of the following methods:

- Drag and drop the folder from the Trash folder to another virtual folder.
- Cut the folder from the Trash folder and paste it into another virtual folder.

9.3.2.6 Setting Default Folder Metadata

Setting default metadata cannot be done from the WebDAV client. Use the web user interface and the following procedure to define the metadata defaults for a virtual folder:

1. Open the Hierarchy Folder Configuration Page for the folder.
2. Enter the default metadata for the folder.
3. Click **Update**.

9.3.3 Working with Content

This section covers the following topics:

- "Checking In Content" on page 9-15
- "Checking Out Content" on page 9-16
- "Viewing Content" on page 9-16
- "Modifying Content" on page 9-16
- "Deleting Content" on page 9-17
- "Restoring Content" on page 9-17
- "Copying Content" on page 9-18
- "Moving Content" on page 9-18

Files that were not created in a supported WebDAV client can be checked in, viewed, deleted, copied, and moved through WebDAV virtual folders in Windows Explorer, but they must be checked out through the browser interface.

9.3.3.1 Checking In Content

Placing a file in a virtual folder checks the file into the content server repository. Keep the following points in mind when checking in files through WebDAV:

- You cannot check two files with the same file name into the same folder.
- If an error occurs during check-in, a value might not have been defined for a required field. Make sure that you have defined user default values for required fields on the Default Information Field Configuration Page.
- If the Save As screen appears when you attempt to place a file in a virtual folder, you do not have Write privileges to the security group defined for that folder. You must select a different virtual folder, or save the file on your hard drive and then check in the file through a web browser where you can select the appropriate metadata.
- The title of the checked-in content item depends on the value of the WebDAV title allocation configuration parameter as set by the system administrator. The title will be either the file name (with or without the file extension) or the default title metadata value defined for the folder that the content item is dropped into. Content item titles are assigned as follows:
  - If the WebDAV title inheritance configuration setting is disabled (the default value), the file name *without* the file extension is used as the title (for example, "monthly_report"). This is the naming convention regardless of whether a default title metadata value has been defined for the folder.
  - If the WebDAV title inheritance configuration setting is enabled and no default title metadata value has been defined for the folder, the file name *with* the file extension is used as the title (for example, "monthly_report.doc").
  - If the WebDAV title inheritance configuration setting is enabled and a default title metadata value has been defined for the folder, the defined name is used as the title (for example, "Monthly Report").
- In most WebDAV configurations, an open file is not checked into the content server repository until it is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save creates a new revision in the content server.

- If your file has double-byte characters (for example, Chinese, Japanese, or Korean) in the file name and the content server is running on a Western European operating system, you may not be able to check in the file through WebDAV due to a limitation in Microsoft's WebDAV clients. Eliminate double-byte characters from the file name or check in the file through the web browser interface of the content server.
- Do not use the number sign (#) in your file name. The number sign (#) is an illegal WebDAV character.

9.3.3.1.1 Check-In Through Windows Explorer Use either of the following methods to check in a content item through Windows Explorer:

- Drag and drop a file from your hard drive or another network drive into a virtual folder.
- Copy a file from your hard drive or another network drive and paste it into a virtual folder.

9.3.3.1.2 Check-In Through Microsoft Office Use the following method to check in a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Save a file in a virtual folder and then close the file.

9.3.3.2 Checking Out Content

Opening a file from a virtual folder checks out the file from the content server repository, and locks the file so that other users can only view it. Any of the following actions will check out a content item:

9.3.3.2.1 Check-Out Through Windows Explorer Use the following method to check out a content item through Windows Explorer:

- Open a file from a virtual folder.

9.3.3.2.2 Check-Out Through Microsoft Office Use the following method to check out a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Open a file from a virtual folder.

The Undo Check Out option cancels the content item check-out. This option is displayed only if the content item is checked out, and it is only available to the user who checked out the content item.

9.3.3.3 Viewing Content

You can view a content item without affecting the revision number by opening the content item and then closing the file without saving it. This results in an "Undo Checkout" rather than a check-in of a new revision.

> **Caution:** If you save any changes to a file opened from a WebDAV folder, you will create a new revision.

9.3.3.4 Modifying Content

Modifying a file in a virtual folder checks in a new revision of the content item. Use one of the following procedures to modify a content item.

9.3.3.4.1 Modifying a File in a WebDAV Client Format Use the following procedure to modify a file that is in a WebDAV client supported format (Word, Excel, PowerPoint, and so on):

1. Open the file from a virtual folder, either through Windows Explorer or from a WebDAV client.

   The file is checked out of the content server repository.

2. Make changes to the file.
3. Save the changes.
4. Close the file.

   The file is checked in as a new revision.

In most WebDAV configurations, an open file is not checked into the content server repository until it is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save, including automatic saves, creates a new revision in the content server.

9.3.3.4.2 Modifying a File in a Non-WebDAV Client Format Use the following procedure to modify a file that is not in a WebDAV client supported format:

1. Copy the file from a virtual folder to a temporary location. Make sure that you do not change the file name.
2. Make changes to the file.
3. Save the changes and close the file. Make sure that you use the same file name.
4. Move or copy the file to its original virtual folder, and replace the existing file.

   The file is checked in as a new revision.

9.3.3.5 Deleting Content

Deleting a file from a virtual folder deletes all revisions of the content item. Any of the following actions will delete a content item. See "Deleting Virtual Folders and Their Content" on page 9-10 for detailed information on security and the Trash Bin function.

9.3.3.5.1 Deleting Through Windows Explorer Use the following method to delete a content item through Windows Explorer:

- Delete a file from a virtual folder.

9.3.3.5.2 Deleting Through Microsoft Office Use the following method to delete a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Delete a file from a virtual folder within the Open or Save As dialog box.

9.3.3.6 Restoring Content

If the Trash Bin function is enabled, you can restore content items from Windows Explorer using one of the following methods:

- Drag and drop the file from the Trash folder to another virtual folder.
- Cut the file from the Trash folder and paste it into another virtual folder.

9.3.3.7 Copying Content

Copying a file from one virtual folder to another will check in the copied file as a new content item, or, if the file has the same file name as an existing file in the target folder, it will check in a new revision. The new content item or new revision is stored with the file name and metadata of the latest revision of the source. Any of the following actions will copy a content item from one virtual folder to another if you elect to replace the existing file:

9.3.3.7.1 Copying Through Windows Explorer Use the following method to copy a content item through Windows Explorer:

- Right-drag a file from a virtual folder to another, release, and select **Copy Here**.
- Copy a file from a virtual folder and paste it into another virtual folder.

9.3.3.7.2 Copying Through Microsoft Office Use the following method to copy a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Open a file from a virtual folder, from the **File** menu, select **Save As**, select a different virtual folder, click **OK**, and close the file.

> **Important:** If the Save As dialog appears twice, you do not have Write privileges to the security group defined for the virtual folder. You must select a different virtual folder, or save the file on your hard drive and then check in the file through a web browser where you can select the appropriate metadata.

9.3.3.8 Moving Content

Any of the following actions will move a content item from one virtual folder to another:

9.3.3.8.1 Moving Through Windows Explorer Use the following method to move a content item through Windows Explorer:

- Drag and drop a file from one virtual folder to another.
- Cut a file from a virtual folder and paste it into another virtual folder.

9.3.3.8.2 Moving Through Microsoft Office Use the following method to move a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Open a file from a virtual folder, from the **File** menu, select **Save As**, select a different virtual folder, click **OK**, and close the file.

Moving a file to a different virtual folder does not change the metadata. To apply the new parent folder's metadata, you can use the Metadata Propagation function.

9.3.4 Displaying Web Pages

You can access the content server virtual folder web pages through Windows Explorer rather than through a web browser.

9.3.4.1 Configuring Windows Explorer

To be able to display web pages through Windows Explorer, the application must be set to display the full path in the title bar:

1. In Windows Explorer, from the **Tools** menu, select **Folder Options**.

   The Folder Options screen is displayed.

2. Open the View tab.
3. Under Files and Folders, select the "Display the full path in title bar" check box.
4. Click **OK**.

9.3.4.2 Displaying a Web Page

Use the following procedure to display a content server web page from Windows Explorer:

1. Make sure that you have a Web Folders folder displayed in Windows Explorer. This folder can be in a number of possible locations, but it is usually under My Computer.

   If the Web Folders folder is not displayed, access your contribution folders under My Network Places. You might have to do this a few times for the Web Folders folder to appear.

2. In the right pane of Windows Explorer, double-click the folder for which you want to display the web page.
3. Click in the **Address** bar at the top of the screen.
4. Press the **Enter** key.

   The exploring page for the folder is displayed.

10 Grouping Content with Folios

This chapter discusses grouping content with folios. The chapter covers the following topics:

10.1 Content Folios

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

This section contains the following topics:

10.1.1 About Content Folios

This section defines what a folio is and how it is used.

10.1.1.1 What Is a Folio

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

10.1.1.1.1 The Folio Structure Within Content Server, a folio is displayed starting at the root, or top level. Each simple folio contains content items displayed in a table similar to a standard search results page. Content is added to a simple folio by searching through Content Server.

Each advanced folio can contain folders, called nodes, placeholders for content, called slots, and content items, displayed by default in a hierarchical structure, similar to a standard file system. Slots in an advanced folio are populated with content items by either checking in a new item, or searching for an existing item in Content Server and inserting it into the slot.

Figure 10–1 Simple Folio Structure

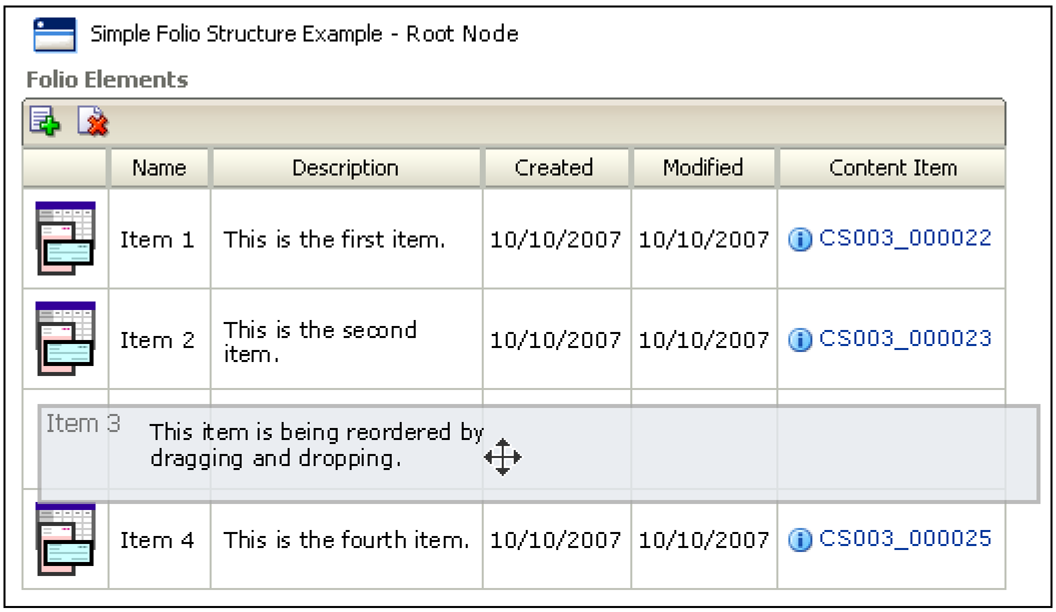
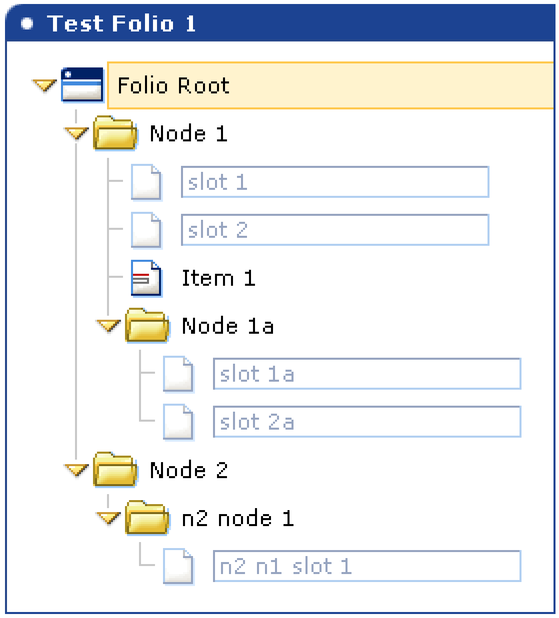


Figure 10–2 Advanced Folio Structure



10.1.1.2 When to Use a Folio

A folio should be used any time you want to create a logical grouping of content, or when you want to provide a structure for other people to create a logical grouping of content. This could be if content needs to be collected for a vendor, if content is associated with one or more projects, or any other time multiple content items need to be grouped in a hierarchy.

10.1.1.2.1 Structured Organization of Content Folios can be used for organization. For example, a company has a consistent way of giving sales presentations to prospective clients, with existing content items used in each new presentation, along with new content specific to the prospective client. Each presentation includes printed material with current background information on the company, printed material of recent press coverage, a slide presentation pertinent to the prospective client, and comments by members of several different departments. A folio template is created that includes content items of the most recent background and press coverage automatically, and has empty slots for the new slide presentation and new comments from each department. When a presentation is being developed for a new client, the selected template is used to create a folio that is routed in workflow. The background information and press coverage reflects the most recent information automatically, and the necessary people insert the required slide presentation and comments as it passes to them in the workflow.

10.1.1.2.2 Managing Records and Reports Folios are useful when a group of documents needs to be created and reviewed as part of one or more workflow processes. For example, an agency generates intelligence reports on various topics. Each report typically has many documents arranged in a particular hierarchy, and every report has the same hierarchy. A system administrator creates a template with nodes in the correct hierarchy. In the appropriate nodes of the hierarchy, he clones required forms, inserts current versions of standard content items included in each report, and creates slots where new content items need to be inserted, with labels for the slots indicating what each is for.

When an agent begins a new report, the agent creates a new folio based on the template created by the system administrator. Once certain crucial information is collected and entered, additional information is contributed by other agents. Once all the required parts of the report are contributed, meaning that all slots in the folio are filled, the folio is sent through one or more workflow processes. The processes may involve further editing and analysis of the data. There may also be processes where one or more the documents contained in the report need to be translated. The translated documents may be added as part of the report if required, or a link could be inserted in the folio to the translations, stored separately.

Security is maintained throughout the creation, review, and translation process based on existing Content Server permissions, meaning that not all contents of the folio are visible to all participants of the workflow. For example, certain employees with *Secret* clearance will not see documents or nodes that require *Top Secret* clearance. In such cases, the agents with *Secret* clearance also remain unaware of the existence of *Top Secret* items in the folio. Employees who have *Top Secret* clearance will see all *Top Secret* and *Secret* documents in the folio. At any stage in the creation or workflow process, an authorized agent is able to easily collect all the items in the folio and download them as a compressed file. Similarly, an authorized user can compile PDFs or content converted to PDF (with PDF Converter) as a single PDF file for easy printing.

10.1.1.2.3 Managing Digital Assets and Production Often catalogs, technical manuals, and other collateral material require many separate files that need to be managed, reviewed, and sent to a vendor for production. A folio is an ideal way of organizing such content.

For example, a large retail chain produces advertising biweekly flyers distributed with newspapers, quarterly catalogs distributed by mail, and an online web site. The three products, flyer, catalog, and web site, share images and text. Each flyer has 8 pages of products, the catalog has 120 pages, and the web site lists the entire inventory.

An advertising/marketing manager at the company begins a new flyer by selecting the Flyer template from the folio template options, and begins a new catalog by selecting the Catalog template.

The new flyer folio contains a slot for the design file, and 8 nodes representing each page. Each node contains a sub-node for images and slots for ad copy. Depending on how the template is set up, the slots could be blank or filled will cloned versions of the previous flyer copy and images as a starting point.

The new catalog folio contains a slot for the catalog design file, a slot for discussion of the catalog design, a node for global images, and 7 nodes representing each section of the catalog. Each section node has a slot for the section design file, a sub-node for images, and another sub-node for ad copy.

The folios are sent into workflow to others who create content for the empty slots or modify the existing content. As items are checked into Content Server, a single item can be added to each of the folios. When all items are checked in to a folio, the folio is continues on in the workflow to the layout designers, who create the flyer and catalog designs. Once each folio is done, it is locked and future flyers and catalogs may be started by copying these or beginning fresh using the appropriate template.

10.1.1.2.4 Custom Uses The above examples are only a few ways in which Oracle Content Server can be used. Additional uses depend on your business needs. If you would like help implementing Content Server within your organization, contact Oracle Consulting Services.

10.2 Working with Folios

Like any other item in Content Server, folios are created and checked in. Associated metadata can be searched for and reviewed. Revisions can be tracked by making snapshots of a folio, and folios can be locked or unlocked to control whether changes can be made.

This section covers the following topics:

10.2.1 Creating a Simple Folio

A simple folio creates a flat folio with no additional hierarchy. The content of a simple folio is displayed in a table, similar to a search results page. A simple folio can be converted to an advanced folio later if additional structure is required, however an advanced folio cannot be converted to a simple folio.

Although a simple folio displays content in a manner similar to a standard Content Server search results page, there is an important difference. A standard search results page displays content information from a content item's metadata. The Edit Simple Folio Page displays element information from the XML file stored in Content Server that defines the folio. This element information is unique to the folio, and can be changed in the folio without affecting the content item's metadata. For more information, see the section on the "Element Info Tray" on page A-74 of an advanced folio, and the section "Updating Simple Folio Element Information" on page 10-8.

To create a simple folio once you have logged in to Content Server:

1. Open the Content Management tray in the tray area.
2. Click **New Folio**. The Pick Folio Type Page is displayed.
3. Accept the default **Simple Folio**.
4. Click **Load folio**. The Edit Simple Folio Page is displayed.
5. Select **Save folio** from the Actions menu. The Set Folio Profile Page is displayed.

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

6. Choose the profile to be used with the folio, if any, and click **Next**. The Folio Check In Page is displayed.
7. Enter the required information and click **Check in**. The Folio Check In Confirmation Page is displayed.
8. Select how to proceed and click **Finish**. Options are:
   - Continue editing the folio to add content. The Edit Folio Page is displayed.
   - View content information for the folio. The Content Server content information page for the folio is displayed.
   - View the folio. The View Folio Page is displayed.

10.2.2 Creating an Advanced Folio

An advanced folio is a folio that allows for a hierarchical structure. The structure may be predefined in a template by the system administrator, or if no template is associated, it may be modified dynamically as the folio is created and edited. The structure of a template-based folio may or may not be modified later, depending on the template.

To create an advanced folio once you have logged in to Content Server:

1. Open the Content Management tray in the tray area.
2. Click **New Folio**. The Pick Folio Type Page is displayed.
3. Select **Advanced Folio** and select a template if needed.
4. Click **Load folio**. If a content item associated with a selected folio template is set to be cloned, then the Set Folio Profile Page is displayed and you are prompted to first check in the folio and skip to step 6. If not, The Edit Folio Page is displayed.
5. Select **Save folio** from the Actions menu. The Set Folio Profile Page is displayed.

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

6. Choose the profile to be used with the folio, if any, and click **Next**. The Folio Check In Page is displayed.
7. Enter the required information and click **Check in**. The Folio Check In Confirmation Page is displayed.
8. Select how to proceed and click **Finish**. Options are:

- Continue editing the folio to add structure or content. The Edit Folio Page is displayed.
- View content information for the folio. The Content Server content information page for the folio is displayed.
- View the folio. The View Folio Page is displayed.

10.2.3 Modifying Folio Structure and Content

Simple folios have a flat structure displayed as a table. The order of the content is displayed in the table and can be changed using the Edit Simple Folio Page. Content can be added or deleted, but simple folios do not have a hierarchical structure.

Structure can be added to a simple folio by converting it to an advanced folio, but once done, it cannot be converted back to a simple folio.

Advanced folios have a hierarchical structure. If a predefined template was selected when the folio was created, the folio may or may not be modified, depending on the properties set when the template was created by the system administrator. If no template was selected when the folio was created, the folio has a single, root node. Structure can be defined and modified later. Nodes, slots, and content items can be added, deleted, modified and moved within an advanced folio's structure, and the associated properties set using the Edit Folio Page.

This section covers the following topics:

- "Editing a Simple Folio" on page 10-7
- "Editing an Advanced Folio" on page 10-8

10.2.3.1 Editing a Simple Folio

Simple folios have a flat structure. Items can be added, deleted, or reordered within a simple folio. Unlike advanced folios, items added to a simple folio must already be checked in to Content Server.

10.2.3.1.1 Adding Items to a Simple Folio Items can be added to a simple folio using the Edit Simple Folio Page.

To add content to a simple folio:

1. On the Edit Simple Folio Page, click **Add Icon** in the table heading above the thumbnail column. A search profile page is displayed.
2. Select a search profile, if necessary, and click **Next**. The appropriate Content Server search form is displayed.
3. Enter your search criteria and click **Search**. A search results page is displayed.
4. Select the item or items you want to add to the simple folio and click **Next**. The selected items are added to the content listed in the simple folio.
5. Select **Save changes** from the **Actions** menu to save the content to the folio.

> **Important:** You must save the page before navigating away from it. If you do not save the folio, it and any changes to it will be lost.

10.2.3.1.2 Deleting Items from a Simple Folio Items can be deleted from a simple folio using the Edit Simple Folio Page.

To delete content from a simple folio:

1. Select the item to be removed from the folio on the Edit Simple Folio Page by clicking once on the row of the item to be deleted. The row is highlighted.

> **Tip:** Multiple sequential items can be selected by holding the shift key down while clicking the first and last items to be selected. Multiple non-sequential items can be selected by holding the control key down while clicking each item to be selected.

2. Click the Delete Icon in the table heading above the thumbnail column. The item or items are removed from the displayed list of items in the folio.

3. Select **Save changes** from the **Actions** menu to save the content to the folio.

Important: You must save the page before navigating away from it. If you do not save the folio, it and any changes to it will be lost.

10.2.3.1.3 Reordering Items in a Simple Folio Items in a simple folio can be reordered by dragging and releasing them.

To reorder items in a simple folio:

1. Click and hold on the row you want to move and drag it to the new position, then release.

2. Select **Save changes** from the **Actions** menu to save the content to the folio.

10.2.3.1.4 Updating Simple Folio Element Information Although a simple folio creates a flat folio with no additional hierarchy, the content of a simple folio is associated with the folio using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the table of the Edit Simple Folio Page. This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.

To update the element information in a simple folio:

1. On the Edit Simple Folio Page, double-click the information you want to update. An editable text field is displayed above the information. By default, only the name and description can be updated.

2. Modify the information and press the **Enter** key, or click anywhere outside of the text field. The changes are applied.

3. Select **Save changes** from the page **Actions** menu. The element information is updated.

10.2.3.2 Editing an Advanced Folio

An advanced folio is a folio that allows for a hierarchical structure and the insertion of *Hypertexts*, which are hyperlinks to web sites. Like a simple folio, items can be added, deleted, or reordered within an advanced folio. Unlike simple folios, items can be nested in folders (nodes), empty slots can be created as placeholders for content items, and items can be added to an advanced folio by searching Content Server for existing content, or by checking in new content through the folio interface.

The structure and content associated with an advanced folio is defined using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the Element Info Tray area of the Edit Folio Page. This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.

The structure of an advanced folio may be predefined in a template by the system administrator. The structure of a template-based folio may or may not be modified later, depending on the template.

10.2.3.2.1 Adding and Organizing Nodes and Slots Nodes and slots can be added to, moved within, and removed from folios using the Edit Folio Page. Working with the folio hierarchy and organizing items within it is similar to working with folders and files in other environments, such as a computer file system. For example, you can drag-and-drop content items into a folder or slot from the Source Items Tray, and drag-and-drop nodes, slots, and items within the folio hierarchy area to reorganize them. Additionally, right-clicking on a node, slot, or item in the folio hierarchy section displays a contextual menu with options for the selection identical to those in the contextual menu of the Element Info area.

To add nodes or slots to a folio:

1. Navigate to the Edit Folio Page of the folio to modify.
2. Select the node in which to add a new node or slot. This can be the root node, or a node within another node.
3. Right-click on the selected node or click the contextual menu icon in the Element Info area to open an element contextual menu.
4. Select **Create Node** or **Create Slot** from the contextual menu. A new node or slot is displayed.
5. Select **Save changes** from the *Actions* menu to save the changes to the folder hierarchy.

Important: If you do not save changes before navigating away from the folio, any changes will be lost.

10.2.3.2.2 Adding Content Items to an Advanced Folio Content items are added to an advanced folio by using the Source Items tray on the Edit Folio Page, the Element Info contextual menu, a search results page, or a digital asset basket. For example, content items are added to a folio by one of the following ways:

- By using the Source Items area on the Edit Folio Page to search Content Server for existing content, and then dragging the items into the folio hierarchy. See "Adding Items from the Source Items Area" on page 10-10.
- By displaying a digital asset basket in the Source Items area on the Edit Folio Page, and then dragging the items into the folio hierarchy. See "Adding Items from the Source Items Area" on page 10-10.
- By selecting *Insert Item by Search* from the Element Info contextual menu to search for existing Content Server content and add it to the folio. See "Inserting an Existing Item Using a Contextual Menu" on page 10-10.
- By selecting *Insert Item by Checkin* from the Element Info contextual menu to check a new content item into Content Server and add it to the folio. See "Inserting an New Item Using a Contextual Menu" on page 10-11.
- By using a search results page to add existing content to the Source Items area of a new or existing advanced folio. See "Adding Items from a Search Results Page" on page 10-11.
- By publishing content gathered in a digital asset basket to a new folio created during the publishing process. See "Adding Items from a Digital Asset Basket" on page 10-12.

10.2.3.2.3 Adding Items from the Source Items Area The Source Items area of an Edit Folio Page displays content already checked into Content Server. The content may be collected in a digital asset basket that is displayed in the Source Items area, or collected using the Source Items area search feature. The source items contextual menu lists each set of items that can be displayed in the Source Items area.

To add items to a folio from the Source Items area:

1. Navigate to the Edit Folio Page of the folio to which content is being added.
2. Select the content set containing the items to add from the Source Items area contextual menu.
3. Select the appropriate item in the Source Items area, and drag it to the node or slot in the folio to which to add the item.
4. Select **Save changes** from the Edit Folio Page Actions menu.

Important: If you do not save changes before navigating away from the folio, any changes will be lost.

If no items have been collected into a digital asset basket or into the Source Items area, you can search for items using the Source Items area search function.

To collect items into the Source Items area using the search function

1. Navigate to the Edit Folio Page of the folio to which content is being added.
2. Click **Search** in the Source Items area. The Search for Items page is displayed.
3. Select a profile to use for searching, if any, and click **Next**. A search form is displayed.
4. Choose the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page is displayed.
5. Select the items to collect by enabling the check box next to the item or items in the search results, then click **Next**. The items are listed in the Source Items area.
6. Select **Save changes** from the Edit Folio Page Actions menu.

Note: Items cannot be selected across multiple pages of search results.

10.2.3.2.4 Inserting an Existing Item Using a Contextual Menu Items that have already been checked into Content Server can be searched for and inserted directly into a folio node or slot by using *Insert Item by Search* in the Element Info contextual menu. This contextual menu is also available by right-clicking the appropriate node or slot.

To search for and insert a content item directly into a folio node or slot:

1. Navigate to the Edit Folio Page of the folio to which content is being added.
2. Select the node or slot into which the content will go.
3. Open the Element Info contextual menu by either right-clicking on the node or slot, or by clicking the contextual menu in the Element Info area. The Element Info contextual menu is displayed.
4. Select **Insert Item by Search.** The Search for Item page is displayed.

5. Choose the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page is displayed.

6. Click **Select** next to the item to insert. The item is inserted into the folio.

10.2.3.2.5 Inserting an New Item Using a Contextual Menu New items that have not yet been checked into Content Server can be inserted directly into a folio node or slot by using *Insert Item by Check In* in the Element Info contextual menu. This contextual menu is also available by right-clicking the appropriate node or slot.

To search for and insert a content item directly into a folio node or slot:

1. Navigate to the Edit Folio Page of the folio to which content is being added.

2. Select the node or slot into which the content will go.

3. Open the Element Info contextual menu by either right-clicking on the node or slot, or by clicking the contextual menu in the Element Info area. The Element Info contextual menu is displayed.

4. Select **Insert Item by Check In.** The Item Check In page is displayed.

5. Fill in the appropriate criteria for the item you are checking in, and click **Check In**. A check in confirmation page is displayed.

6. Click **Add Item to Folio**. The item is inserted into the folio.

7. Select **Save changes** from the Edit Folio Page Actions menu.

10.2.3.2.6 Adding Items from a Search Results Page You can add items from a search results page either directly to a new folio, or to the Source Items area of an existing folio or new template-based folio. Once listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. See "Adding Items from the Source Items Area" on page 10-10 for more information.

To add items from a Search Results Page to a new folio:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the folio.

2. Select **Add items to folio** from the table actions menu above the check boxes. The Add Items To Folio page is displayed.

3. Ensure **New folio** is enabled and click **Next**. The Pick Folio Type page is displayed.

4. Select **Simple Folio,** or select **Advanced Folio** and choose an appropriate template, if any.

   - Selecting Simple Folio inserts the selected content items in the root node of a flat, single node folio. See "Edit Simple Folio Page" on page A-69 for more information.

   - Selecting Advanced Folio enables the Folio Template choice list, providing access to folio templates with structure predefined by a system administrator. See "Edit Folio Page" on page A-71 for more information.

5. Click **Load folio**. If Simple Folio was selected in step 4, then the Edit Simple Folio Page is displayed with the selected elements listed. If Advanced Folio was selected in step 4, then the Edit Folio Page is displayed with the selected content items inserted into the root node of the advanced folio.

6. Select **Save changes** from the Edit Folio Page Actions menu.

Important: If you do not save changes before navigating away from the folio, any changes will be lost.

To add items from a Search Results Page to an existing folio:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the folio.
2. Select **Add items to folio** from the table actions menu above the check boxes. The Add Items To Folio page is displayed.
3. Enable **Existing folio** and click **Next**. The Select Folio Profile page is displayed.
4. Select the appropriate profile, if any, and click **Next**. The Search for Existing Folio page is displayed.
5. Choose the criteria appropriate to the folio for which you are searching, and click **Search**. The Folio Listing page is displayed.
6. Click **Select** by the folio to which the content items are to be added. The Edit Folio Page of the selected folio is displayed, with the content items listed in the Source Items area. Once listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. See "Adding Items from the Source Items Area" on page 10-10 for more information.
7. Select **Save changes** from the Edit Folio Page Actions menu.

10.2.3.2.7 Adding Items from a Digital Asset Basket Digital asset baskets are used to manage collected items. Items in digital asset baskets are displayed in the Source Items area of a folio when a digital asset basket is selected from the Source Items contextual menu. Once displayed in the Source Items area, content in a digital asset basket can be added to the folio by dragging it to the appropriate node or slot. See "Adding Items from the Source Items Area" on page 10-10 for more information.

Additionally, items in a digital asset basket can be published to a new folio from the Digital Asset Basket page.

To publish content in a digital asset basket:

1. Open **My Baskets** under the **My Content Server** tray and select the digital asset basket that contains the items to be published to a new folio. The digital asset basket page for that basket is displayed.
2. Select **Publish to folio** from the page Actions menu. The Edit Folio Page is displayed with the published items inserted at the root level of a new folio.
3. Select **Save folio** from the Edit Folio Page Actions menu.
4. Continue with step 6 of the section Creating an Advanced Folio.

Important: If you do not save changes before navigating away from the folio, any changes will be lost.

10.2.3.2.8 Updating Advanced Folio Element Information The content of an advanced folio is associated with the folio using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the Element Info Tray. This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.

To update the element information in an advanced folio:

1. Select the node, slot, or item you want to update in the Folio Structure Tray of the Edit Folio Page. The element information is displayed in the Element Info Tray.
2. Modify the information and press the **Enter** key, or click anywhere outside of the text field. The changes are applied.
3. Select **Save changes** from the page **Actions** menu. The element information is updated.

10.2.4 Taking Snapshots

A folio's hierarchy is defined in an XML file checked into Content Server as a content item. Like any content item in Content Server, a folio can have multiple revisions. Unlike other content items, however, new revisions of a folio are created by taking a snapshot of the folio using the Edit Folio Page Actions menu, rather than explicitly checking out the content and checking in a new revision.

When a snapshot is taken, the current hierarchy is saved and duplicated as a new revision. The new revision can continue to be edited. The previous revision maintains the folio hierarchy at the point the snapshot was taken. Like any content item in Content Server, revision history of the folio is accessed from the folio content information page.

To take a snapshot of a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Select **Actions**, **Create snapshot**. The Edit Folio page refreshes.

> **Tip:** You can verify that a new revision has been created by selecting **Actions**, **Content Item** info from the Edit Folio Page and reviewing the revision history on the Content Information page.

10.2.5 Locking and Unlocking Folios

Locking a folio takes a snapshot of a folio and locks it, preventing it from being edited. Once a folio is locked, people who have rights to edit the folio are directed to the View Folio page instead of the Edit Folio Page.

To lock a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Select **Actions**, **Lock folio**. The View Folio page is displayed.

If required, a locked folio can be unlocked for additional edits. Unlocking a folio duplicates the locked folios hierarchy as a new revision available for editing.

To unlock a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Select **Actions**, **Create editable revision**. The Edit Folio page is displayed.

10.2.6 Downloading Folio Renditions

Once content in Content Server is associated in a folio, renditions of the associated content can be made. Renditions are defined and made available by your system administrator, and can be in a variety of forms. For example, a zip rendition could be a single compressed file containing all folio content to which you have access. Or a PDF rendition could assemble all folio content to which you have access into a single PDF file suitable for printing. Additional renditions can be defined to meet your organizations needs.

To download renditions of a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Select the rendition you require from the **Renderers** menu. A dialog box asking for the download location is displayed.

> **Important:** A PDF rendition is only possible if the content associated with the folio has a PDF web-viewable file. This means that either the associated content item is a PDF file, or that you system administrator has set up PDF Converter to generate a PDF version. If the folio is associated with items that do not have a PDF version as well as items that do, only the items with PDF versions become part of the PDF rendition.

10.2.7 Finding Existing Folios

Because a folio is managed by Content Server as a single XML file, folios can be found by searching Content Server in the same way you would find any content item. You can use the search tray, the Advanced Search page, or the Quick Search field to search for folio titles or other associated metadata. Only folios for which you have permissions are displayed in the search results. A folio icon is displayed in the Actions column of the search results field. Clicking the icon displays the folio. If you can edit the folio, the Edit Folio Page is displayed, otherwise, the View Folio Page is displayed.

On the content info page of a content item that is in a folio, you will see a Folio Membership section (above the Revision table). This has a "show" link which, when clicked, lists the folios to which the content is a member. There are also action icons next to the listed folios with the option to View the Folio or see it's content info.

10.2.8 Viewing Folios

Folios can be viewed in the following ways:

- Using the Edit Folio Page, which displays the folio hierarchy and allows the folio to be edited, provided you have the rights to do so
- Using the View Folio Page, which by default shows the folio hierarchy but cannot be edited. Additional views can be defined by your system administrator, and may not resemble the default folder hierarchy view.
- Viewing the native XML file (file extension .xcsr) from a content information page link.

10.2.9 Viewing Folio Information

Folio information, including revision history, is displayed on the content information page of the XML file checked into Content Server. It is accessed by clicking the Info icon next to a folio in the Actions column on a search results page, or by selecting **Content Item info** from the **Actions** menu on the Edit Simple Folio Page, Edit Folio Page, or View Folio Page.

10.2.10 Subscribing to Folios

You can subscribe to simple and advanced folios like any other item in Content Server. Because changes can be made to folios and folio items without causing a new revision to the folio, however, you can choose the types of changes that cause you to be notified using the Subscribe to <folio_name> page.

To subscribe to changes made to a folio or folio items:

1. Select **Subscribe** from the **Content Actions** menu on the content information page of the folio to which you want to subscribe. The Subscribe to <folio_name> page is displayed.
2. Select one or more of the actions for which to be notified by enabling the check box:
   - Child update: This will notify on any change to content linked to by this folio
   - Add: This will notify when anything is added to this folio
   - Modify: This will notify when attributes are modified in this folio
   - Delete: This will notify when anything is deleted from this folio
3. Click **Subscribe**. The standard Content Server content information page for the folio is displayed.

10.2.11 Using Digital Asset Baskets

Digital asset baskets are a useful way to collect items checked into Content Server. Content is added to a digital asset basket from the search results page. Once collected in a digital asset basket, items can be published to new folios or easily accessed from within existing folios in the Source Items Tray of the Edit Folio Page. Multiple baskets can be created using the Manage Content Baskets Page to help organize content by project, author, date, type, or any other way that you find useful.

Content added to digital asset baskets still resides in the Content Server repository. It does not change physical locations. Instead, the metadata for items in a digital asset basket is updated to reflect the basket or baskets to which a content item is added. Clicking on a digital asset basket link executes a search for the metadata reflecting that digital asset basket, and returns a search result page listing the content items. This allows content to be collected in more than one basket.

10.2.11.1 Managing Digital Asset Baskets

Digital asset baskets are created and deleted using the Manage Content Baskets Page. Multiple baskets can be created, but only one basket can be active at a time. Only the active basket can have content added to it.

To create a digital asset basket:

1. Click **My Baskets** under the **My Content Server** tray. The Manage digital asset baskets page is displayed.
2. Click **Append basket**. A new field is displayed on the page.
3. Enter a name for the basket in the new field.
4. Enable **Active** next to the new basket to make it the active basket if desired, otherwise leave disabled. Only the active basket can have content added to it.
5. Click **Update**. The new basket is displayed under **My Baskets** in the **My Content Server** tray.

To delete a digital asset basket:

1. Click **My Baskets** under the **My Content Server** tray. The Manage digital asset baskets page is displayed.
2. Enable **Delete** next to the basket to delete and click **Update**. The basket is removed from the Manage digital asset baskets page and from under **My Baskets** in the **My Content Server** tray.

10.2.11.2 Working with Digital Asset Baskets

Multiple digital asset baskets can be created to help organize collected content. Only the active basket can have content added to it. Content is added to the active basket from a search results page. Content can be moved between baskets, copied into another basket, or reordered within a basket.

10.2.11.2.1 Setting the Active Basket

You can set the active basket on the Manage Digital Asset Baskets page.

To set the active basket:

1. Click **My Baskets** in the **My Content Server** tray. The Manage Digital Asset Baskets page is displayed.
2. Select **Active** next to the desired basket and click **Update**. The Basket Icon changes, and *Active* is displayed next to the newly active basket under **My Baskets** in the **My Content Server** tray.

10.2.11.2.2 Adding Content to the Active Basket You can add content to the active basket from a search results page.

To add content to the active basket:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the active basket.
2. Select **Add to active basket** from the table actions menu above the check boxes. The Home page is displayed.
3. You can verify that the content is added to the active basket by opening **My Baskets** in the **My Content Server tray** and clicking the active Basket Icon. The active basket page is displayed.

10.2.11.2.3 Moving and Copying Content Items If you inadvertently add content to the wrong basket and want to move it, or if you want to reorganize your content into different baskets, you can do so. Also, you can copy content in one basket into another basket, so that it is displayed in both.

To move or copy content items from one basket to another:

1. Open **My Baskets** in the **My Content Server tray** and click the basket link of the basket from which you want to move or copy content.
2. Select content to move or copy by enabling the check box next to the item or items.
3. Using the table Actions menu, select **Actions**, **Move selected items** to move content, or **Actions**, **Copy selected items** to copy content. The Move Basket Items page or Copy Basket Items page is displayed.
4. Click the basket to which the items are to be moved or copied. The Home page is displayed.

10.2.11.2.4 Removing Content Items

Items can be removed from any digital asset basket.

To remove content items from a basket:

1. Open **My Baskets** in the **My Content Server tray** and click the basket link of the basket from which you want to remove content.
2. Select content to remove by enabling the check box next to the item or items.
3. Using the table Actions menu, select **Actions**, **Remove selected items**. The Home page is displayed.

10.2.12 Understanding Folio Workflows

When working with folios in a workflow, it is important to remember that technically a folio is an XML file checked into Content Server that lists associated content in a meaningful way. When a folio is routed in a workflow, it is the XML file that is being routed, so it is the structure of the folio that is being reviewed and edited, not the content items associated with the folio. They are not routed.

Think of the folio as a list of items. When a folio is routed in a workflow, you are being asked to review the list of items, and possibly update, add to, or rearrange them. Looking at the example used in the section "Structured Organization of Content" on page 10-3, a company used a template to create a folio to include information for a sales presentation. The new folio already has the latest press releases and company background associated with it automatically, based on the template, and empty slots for slide presentations from several departments pertinent to the prospective client.

In this case, when the folio gets routed through a workflow, the appropriate people are being asked to create slide presentations and insert them into the appropriate slots on the folio. The slide presentations they work on can go through any number of separate workflows and be checked in and out of Content Server any number of times, but the folio won't move on in the workflow until content is associated with the specified empty slots. Once that is done and the folio moves out of workflow, the folio is associated with the latest revisions of the content items listed in the folio, until a snapshot of the folio is taken or the folio is locked.

11

Using Images and Video

This chapter describes how to manage images and videos from within Content Server using the Digital Asset Manager functionality. This functionality is installed and disabled by default. Your system administrator chooses whether to enable this functionality for your site. The chapter covers the following topics:

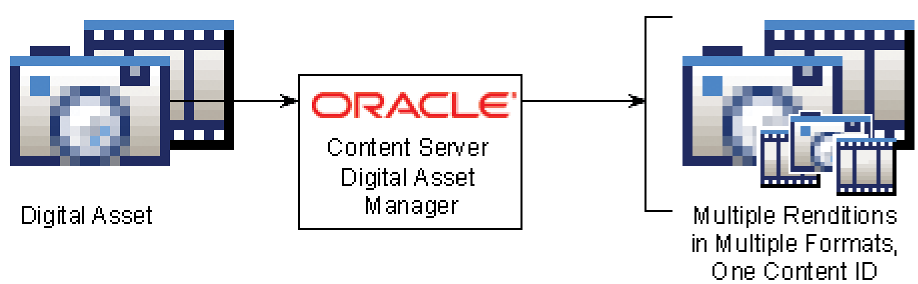
- "About Digital Asset Manager" on page 11-1
- "Working with Digital Asset Manager" on page 11-2
- "FlipFactory Supported Formats" on page 11-26
- "Included Image Rendition Sets" on page 11-29

11.1 About Digital Asset Manager

Digital Asset Manager enables you to quickly find, group, convert, and download images and videos of various sizes, formats, and resolutions to meet your business needs, all while maintaining a consistency of use across your organization. For example, an organization's logo may need to be available in a variety of sizes for advertisements, web pages, and presentation, or a company training video may need to be available in a variety of formats for streaming on an intranet, presenting to an audience, or copying to tape.

Your system administrator will have worked with you and other contributors to define the desired size and output. At check in, the digital asset is automatically converted into the defined formats and sizes, known as renditions. You can then search for the asset using standard metadata or closed-caption text if it is a video asset. From the Rendition Information page you can add renditions to a digital asset basket and download a single compressed file of the renditions you need.

Figure 11–1 Overview



Digital Asset Manager adds the following pages to Content Server:

- Rendition Information Page
- Video Preferences Page
- Digital Asset Basket Page
- Add a Rendition Page
- Rendition Parameters Page
- DAM Search Fields Administration for *content-server* page
- Link E-Mail Confirmation
- Image Data page
- Add/Edit Attachments page

Digital Asset Manager also adds functionality to the Content Check In, Content Information, and Content Information Update pages, as well as all search result pages and the **My Content Server** tray.

11.2 Working with Digital Asset Manager

This section covers the following topics:

11.2.1 About Using Digital Asset Manager

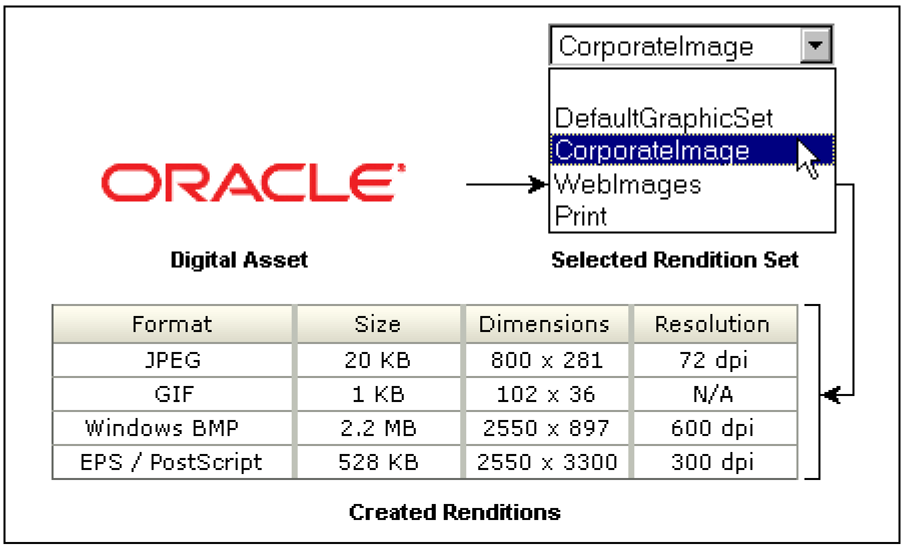
Digital Asset Manager enables you to create and find images and videos in specified formats and sizes. This helps your organization maintain consistent standards for branding and asset use, while providing the right content to the right people in the right format.

Digital Asset Manager creates multiple formats of digital assets automatically when checked into Content Server, and lists the formats under one content ID. If you create digital assets, such as a corporate artwork or commercial videos, this ensures that the assets maintain a standard size and quality in each format required by your organization. And the content management and workflow features of Content Server ensure that all versions used are approved, because Digital Asset Manager creates them from a single source managed by Content Server.

If you use digital assets, Digital Asset Manager gives you the confidence that you are using the approved asset in the format for your needs. For example, an image of the logo in a format for use on a web-site can be bundled and downloaded with other formats of the logo for use in office presentations or print collateral, all from a single digital asset checked into Content Server. Or, a low-bandwidth version of a training video can be posted to a streaming server while a high-bandwidth version can be provided to a vendor for replication to tape or DVD.

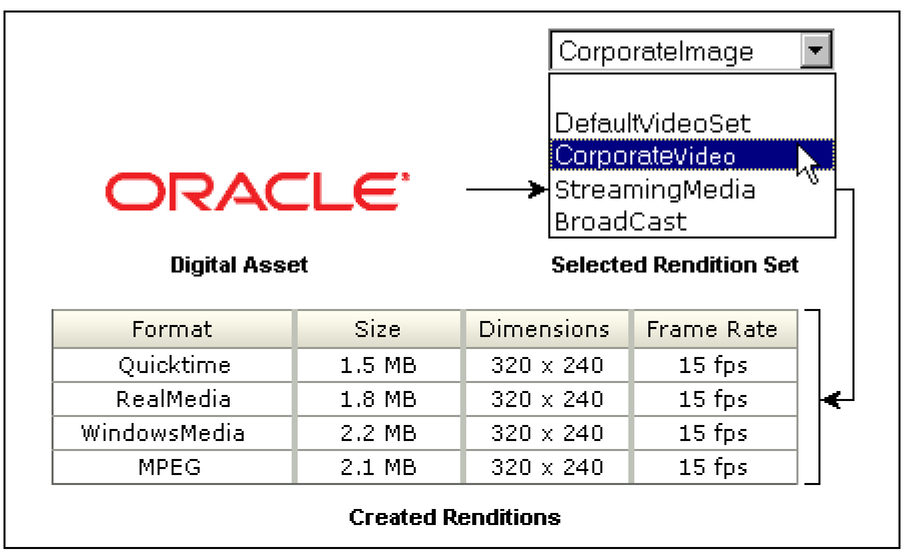
Each format created by Digital Asset Manager is called a rendition. Each image rendition is created based on information regarding size, color, format, and other criteria defined by your system administrator. Each video rendition is created based on information regarding display size, bandwidth, and expected use. Renditions are grouped into rendition sets. When you check in a digital asset, you choose a rendition set, which then determines what renditions are created for the asset. When finding a digital asset for use, all renditions of the asset are listed on the asset's rendition information page, and are available for download.

Figure 11–2 Example Image Rendition Set and Resulting Rendition Listing



Format	Size	Dimensions	Resolution
JPEG	20 KB	800 x 281	72 dpi
GIF	1 KB	102 x 36	N/A
Windows BMP	2.2 MB	2550 x 897	600 dpi
EPS / PostScript	528 KB	2550 x 3300	300 dpi

Figure 11–3 Example Video Rendition Set and Resulting Rendition Listing



Format	Size	Dimensions	Frame Rate
Quicktime	1.5 MB	320 x 240	15 fps
RealMedia	1.8 MB	320 x 240	15 fps
WindowsMedia	2.2 MB	320 x 240	15 fps
MPEG	2.1 MB	320 x 240	15 fps

11.2.2 Supported Input Formats

Supported input formats are determined by the graphic or video conversion application being used as set up by your system administrator.

Image Input Formats

Common image input formats include the following:

- JPG/JPEG (Joint Photographic Expert Group)
- GIF (Graphics Interchange Format)
- BMP (Bitmap)
- PNG (Portable Network Graphics)
- TIFF (Tag Image File Format)
- PSD (PhotoShop)
- AI (Adobe Illustrator)
- PDF (Portable Document Format)

Image Video Formats

Common video input formats include the following:

- Flash Media Format
- MPEG Layer 3 and 4 Elementary Stream Media Format
- PacketVideo MPEG4 Format
- QuickTime Media Format
- QuickTime Streaming Format
- Windows Media Format
- AVI Media Format
- DVD Stream Media Format
- MPEG1 System Stream Media Format
- MPEG2 Program Stream Media Format
- MPEG2 Transport Stream Format
- MPEG4 Media Format
- Pinnacle MediaStream Media Format

See the conversion application documentation for a comprehensive listing of supported formats.

Formats supported by the conversion application must also be associated with the conversion process within Content Server by the system administrator using the Content Server Configuration Manager. See your system administrator if a supported format is not being rendered.

11.2.3 Supported Video Output Formats

Output formats are limited to what can be displayed effectively in your browser. Only output formats supported by Windows Media Player, Real Player, Flash Player, or Quicktime Player are available for viewing in your web browser. Any assets rendered in a format not supported by those players will still be managed by Content Server, but will be available only for download.

Digital Asset Manager currently supports the following video output formats:

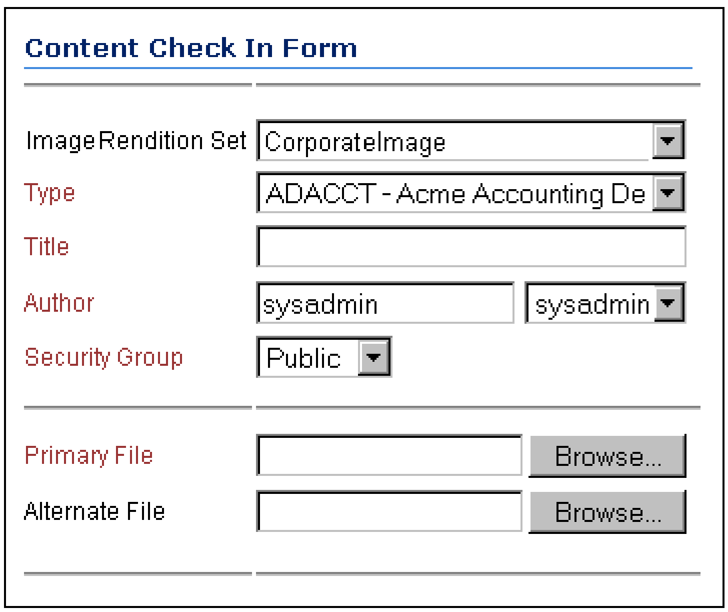
- MPEG Layers 1, 2, and 4 (.mpg, .mpeg, .mp2, .mp4)
- Quicktime (.mov)
- Audio Video Interleave (.avi)
- Flash Video (.flv)

Other output formats not listed here but supported by your media player may work when set up properly by your system administrator. See your system administrator for additional format requests. For information on formats supported by your media player, see the player's help system.

11.2.4 Checking In a Digital Asset

With Digital Asset Manager installed, the Rendition Set list is displayed.

Figure 11–4 Content Check in Form with Rendition Set List



To check in a digital asset, perform these steps:

1. Open the content check-in form.
2. Select a rendition set from the Rendition Set list.
3. Enter a title and any additional metadata for the asset.
4. Click **Browse** to locate the primary file.
5. Click **Check In**. The Check In Confirmation page is displayed.

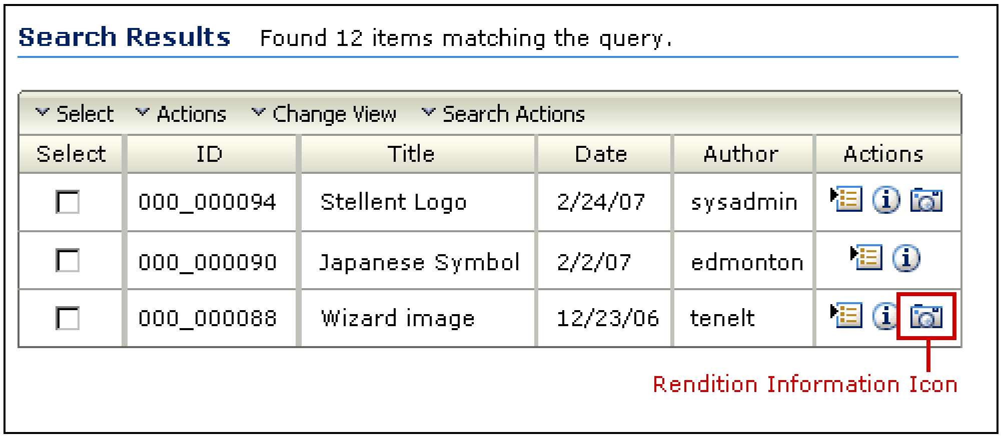
Content Server uses the file extension, such as .psd, .jpg, .mov, or .avi, to determine if an item is a digital asset. You must make sure that all digital assets checked in to Content Server have the correct file extension amended to the file name. For example, a Photoshop file named CorporateLogo.psd will be correctly identified by Content Server as a digital asset, but one named CorporateLogo will not be.

Do not select an alternate file when checking in a digital asset. Doing so prevents the primary file from rendering.

11.2.5 Finding Renditions and Information

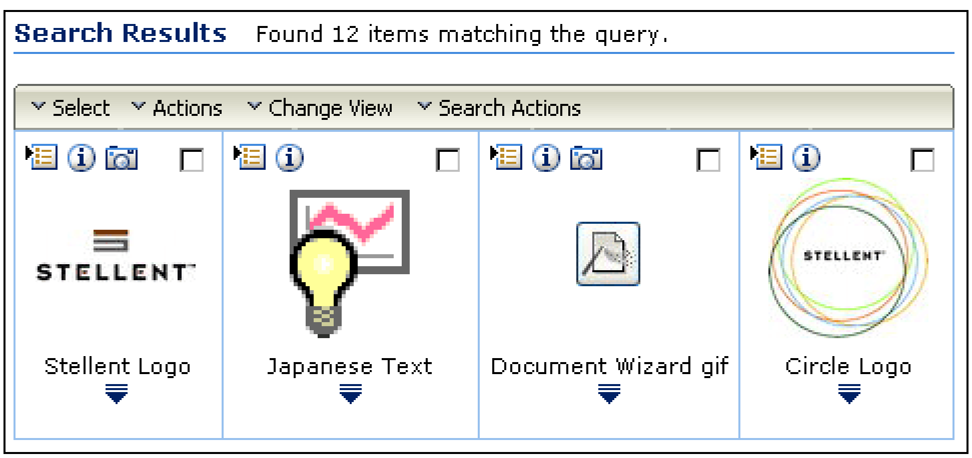
Digital Asset Manager builds on the functionality of Content Server. Searching for digital assets is identical to searching for other types of content. Digital assets have an additional icon displayed in the standard search results page. The Rendition Information icon (Figure 11–5) links to the Rendition Information page of the asset.

Figure 11–5 Search Result Page with Rendition Information Icon



Because you are working with images and videos, you may want to set your default search result view to Thumbnail View. To do so, select **Thumbnail View** from the **Content Actions** menu on a search results page.

Figure 11–6 Thumbnail View Search Results Page.

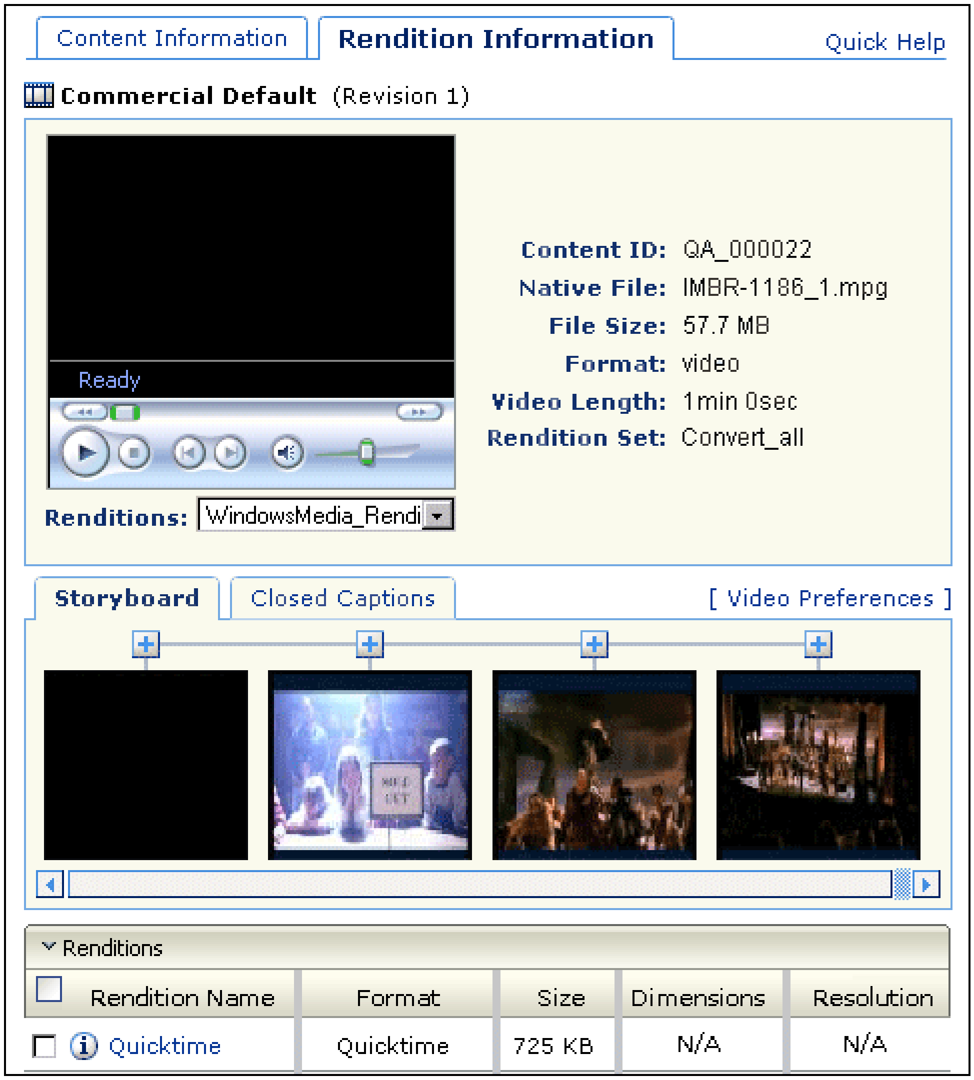


11.2.6 Rendition Information Page

When a digital asset is checked into Content Server, multiple renditions are created based on the rendition set chosen at the time of check in. Just like with standard content, information about the original content item is indexed and displayed on the Content Information page. However, with a digital asset, information about the created renditions, is also displayed on the Rendition Information page, as well as a story board, and any closed-captioned text for video assets.

The Rendition Information page is accessed by a link on the Content Information page, or from a search result page using the Rendition Information icon or the Rendition information link in the Item Action contextual menu.

The Rendition Information page lists the renditions of an asset and provides a variety of information about each rendition.

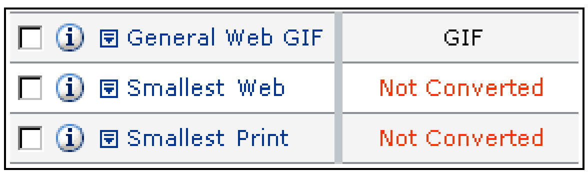


Page Item	Description
Content Information	Displays the Content Information page for the digital asset, showing metadata indexed by Content Server and a listing of any revision history of the asset. It also provides access to actions that can be taken on content items.
Preview Section	Shows a web-viewable rendition of the content item with minimal metadata. For an image asset, clicking the preview image displays the primary rendition in a new window. The primary image is specified by the system administrator, and is typically larger than the preview image.
Renditions list (video asset only)	Switches the rendition format in the preview section, based on available rendition formats.

Page Item	Description
Content ID	The unique identifier used by Content Server to manage the digital asset. Specified at check in.
Native File	The name of the source file of the digital asset.
File Size	The storage size of the source file.
Format	Identifies the format of the native file, the `mime` type.
Video Length (video asset only)	Specifies how much time it takes to play the full video.
Rendition Set	Identifies the metadata option selected when the digital asset was checked in that determines what renditions are created.
Navigation Section (video asset only)	Provides options for navigating through a digital asset using keyframes in a storyboard, or closed caption text if it is available.
Storyboard (video asset only)	Displays a series of keyframes from various intervals in the video. Clicking on a keyframe initiates the video at that point in the preview section. The number of keyframes displayed is configured on the Video Preferences page. Clicking the plus icon above a keyframe expands the storyboard, inserting additional keyframes after the one whose icon was clicked. This enables you to drill down to view keyframes representing shorter intervals of time in the video.
Closed Captions (video asset only)	Displays the closed captioned text of a video if it is available. Clicking on the icon next to a line of text initiates the video at that point in the preview section. If no closed captioned text is available in the video, this tab is not displayed.
Video Preferences (video asset only)	Displays the Video Preferences page, on which you can specify the video format and bandwidth preference for the preview on the Rendition Information page, and the number of keyframes displayed.
Plus/Minus icon (video asset only)	Clicking the plus icon above a keyframe expands the storyboard, inserting additional keyframes after the one whose icon was clicked. Clicking **Refresh** in the upper right of page collapses all opened keyframes.
Renditions Section	Lists the renditions stored under the content ID.
Rendition Name	Name for each rendition, defined in the rendition set chosen at the time the digital asset was checked in or updated.
Rendition Name Info Icon	Displays the Rendition Parameters page. The Rendition Parameters page lists information regarding the parameters of the specific rendition as logged by the conversion application when the rendition was created. This information is valuable to you if you need detailed information about the rendition creation process, or about rendition parameters otherwise unavailable to you.
Rendition Name Description Icon (image asset only)	Displays a more detailed description of the rendition. If no icon is present, then no description exists for the rendition.
Format	Identifies the rendition's file format, or way of organizing and storing the information in the rendition file, as the `mime` type. If an image rendition fails, then the format column displays **Not Converted** for that rendition. Clicking the Rendition Name Info Icon of a failed rendition displays the Rendition Parameters page with information about the cause of the failure (Figure 11–7).
Size (video asset only)	Lists the required storage size of a rendition.

Page Item	Description
Dimensions (video asset only)	Lists the height and width, in pixels, of a rendition.
Framerate (video asset only)	The rate at which each frame of a video is presented, specified in Frames Per Second.
Renditions menu	**Download**—Bundles the selected renditions into a single compressed file and copies the file to a local or networked storage space. **Add to Basket**—Adds the selected renditions and the native file to the digital asset basket. **E-mail Links**—Opens a prompt that enables the user to enter one or more e-mail addresses. Then the e-mail is generated and sent from within the server, after which a confirmation page is shown that displays the format of the e-mail. The URL links to the selected rendition or native file are copied into the body of a new message. **Delete**— (image asset only) Removes selected renditions from the rendition set. **Add a New Rendition**— (image asset only) Displays the Add a Rendition page, enabling a user to manually attach a file to the existing rendition set.

Figure 11–7 Rendition Parameters listing with information about the cause of the failure.



Accessing The Rendition Information Page

To access the Rendition Information page of a digital asset from any page in Content Server, perform one of these steps:

1. Search for the digital asset for which to view rendition information.
2. Click the Rendition Information icon next to the appropriate digital asset on a search results page, or select Rendition Information from the Item Action Contextual menu. The Rendition Information page is displayed.

Alternately, you can access the Rendition Information page from the digital asset basket by performing these steps:

1. Open the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.
2. Click the Rendition Information icon next to the appropriate digital asset in your digital asset basket. The Rendition Information page is displayed.

Once the Rendition Information page is displayed, you can toggle between the Content Information page, the Rendition Information page, and the Image Data page for the asset by clicking the tabs at the top.

11.2.7 Image Data Page

The Image Data page displays information about the native image file checked into Content Server. However, what that information is and how it is displayed is contingent on:

- The specific information the camera or application captures, and
- Whether the image is generated by a digital camera or an application (such as Photoshop).

Image Information

The specific information that is displayed is dependent on the type of camera or application being used to generate the image. Different digital cameras collect different information, depending on the camera features and capabilities. For example, Figure 11–8 shows the contents of the Image Data page for a checked in digital photo. In this case, the information includes the image thumbnail and the photo's digital properties.

Additionally, one camera might have a built-in GPS system and can record GPS coordinates into the image file. Another camera might not have that capability, and so wouldn't be able to output that information to the Image Data page. Similarly, an application such as Photoshop may generate information specific to its feature set while Paintshop Pro would generate different information specific to its different feature set.

Display Formats

How the information is displayed in the image tab is dependent on whether the native image file is a JPEG from a digital camera or if it is from an application. Digital cameras store information using the EXIF standard (Exchangeable Image File format), which is a subset of the XMP standard (Extensible Metadata Platform). Both methods use Oracle's OutsideIn filters to generate XML to structure the data.

If the image is a JPEG from a digital camera, Outside In specifies the document type as JPEG File Interchange, and the EXIF data is displayed on the image data tab in a flat listing (for example, the digital photo shown in Figure 11–8). If the image is from an application such as Adobe Photoshop, Outside In specifies the document type as coming from the application (for example, document type="Adobe Photoshop"), and the XMP data is displayed on the image data tab with some hierarchical structure (for example, the Photoshop image shown in Figure 11–9).

> **Note:** If the image is a digital photograph that has been manipulated in Photoshop, the EXIF data gets aggregated and formatted as part of the XMP data, because EXIF is a subset of XMP.

Figure 11–8 Image Data Page of a Digital Photo

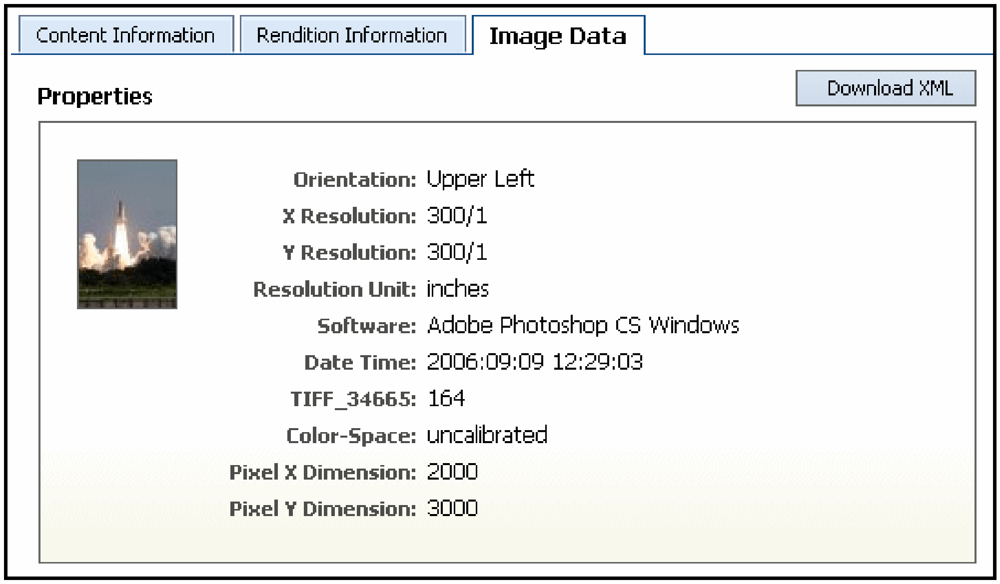
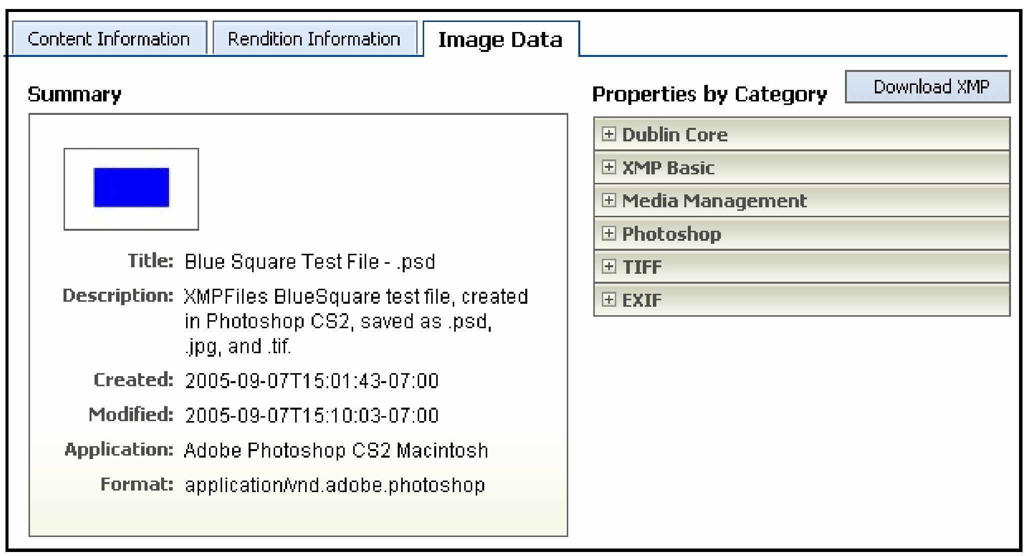


Figure 11–9 Image Data Page of a Photoshop Image



Accessing The Image Data Page

To access the Image Data page of a digital asset from any page in Content Server, perform one of these steps:

1. Search for the digital asset for which to view rendition information.
2. Navigate to either the Rendition Information page or the Content Information pages, and click the **Image Data** tab
3. Select the Image Data tab.

Alternately, you can access the Image Data page from the digital asset basket by performing these steps:

1. Open the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.
2. Click the Rendition Information icon next to the appropriate digital asset in your digital asset basket. The Rendition Information page is displayed.

Once the Image Data page is displayed, you can toggle between the Content Information page, the Rendition Information page, and the Image Data page for the asset by clicking the links at the top.

11.2.8 Rendition Parameters Page

The Rendition Parameters page is accessed by clicking the Rendition Name Information icon next to a rendition name on the Rendition Information page.

If an image rendition fails, the format column in the Renditions section of the Rendition Information page displays **Not Converted** for that rendition. In the case of a failed rendition, the Rendition Parameters page displays information about the cause of the failure.

Figure 11–10 Example of an image Rendition Parameters page.

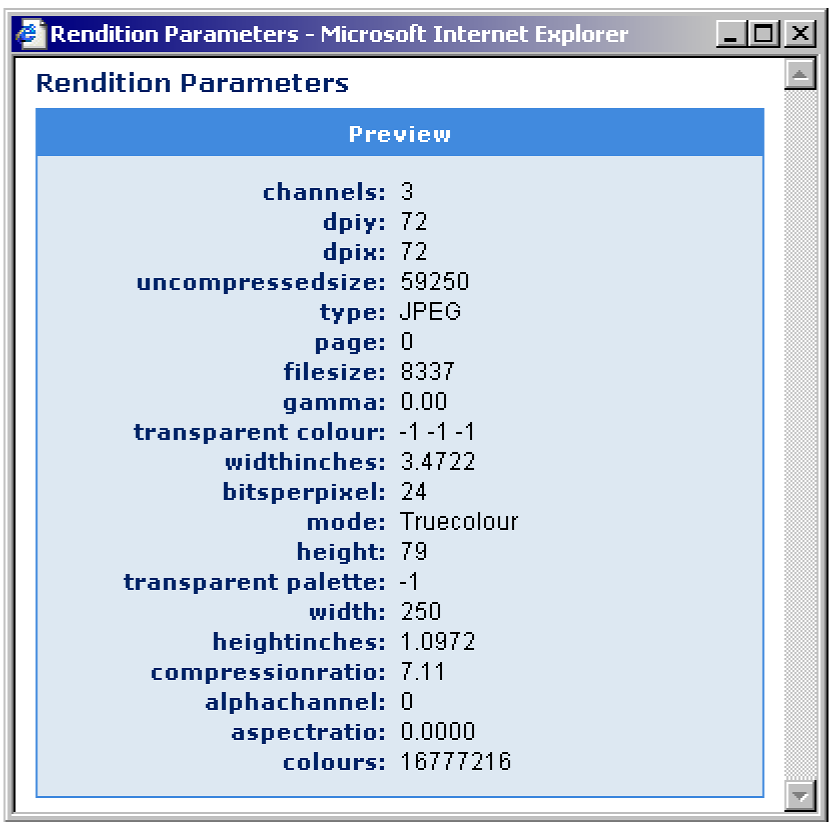
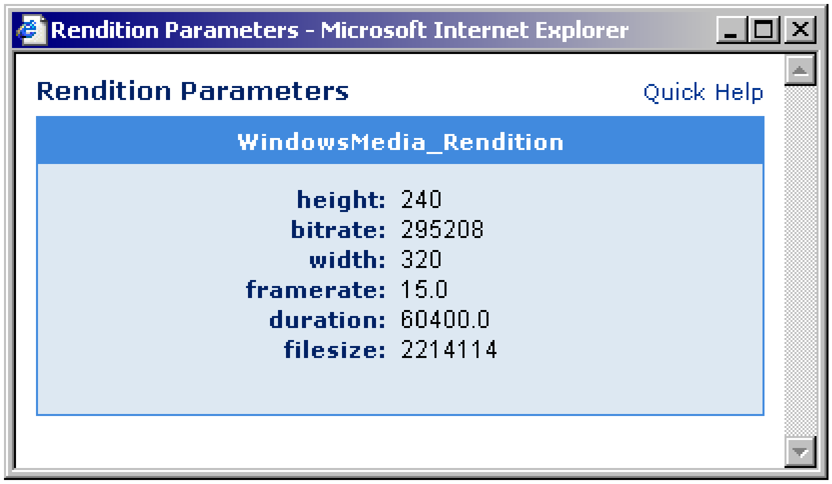


Figure 11–11 Example of a Video Rendition Parameters Page.



Accessing The Rendition Parameters Page

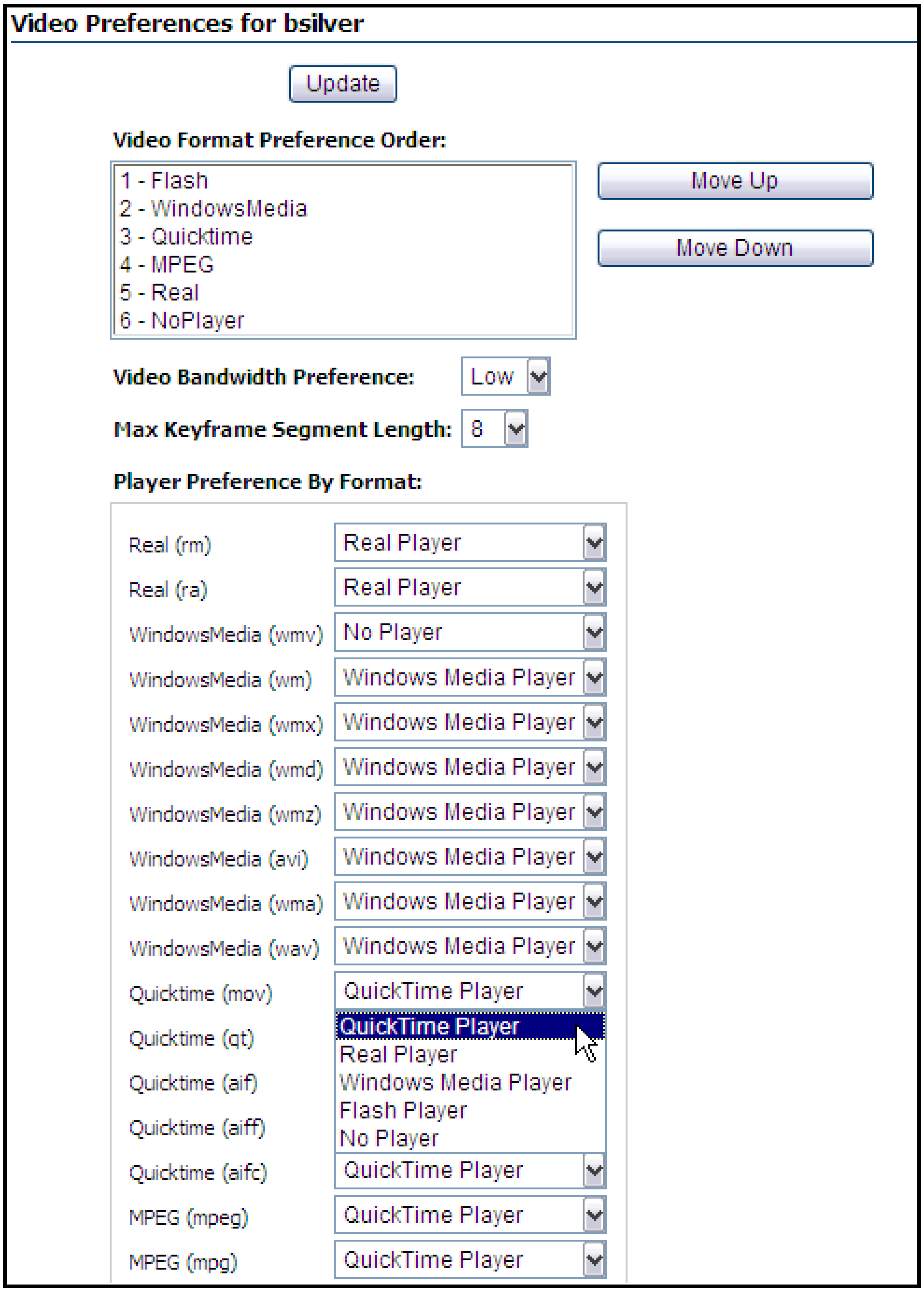
To access the parameters of each specific rendition, perform these steps:

1. Access the Rendition Information page.
2. Click the Rendition Name Info icon. The Rendition Parameters page is displayed.

11.2.9 Video Preferences Page

A video rendition can be played in the preview section of the Rendition Information Page or by clicking a web-viewable link on the Content Information, digital asset basket, or search results pages. Digital Asset Manager determines what format to use as the default for the preview window based on information you specify on the Video Preferences page. You can also specify the number of keyframes displayed in the storyboard on the Rendition Information page, and your preferred bandwidth for the preview.

Other features of the Video Preferences page enable you to specify a video player for each rendition format and to set a No Player Option and a No Format Option for both that affect the preview display on the Rendition Information Page. Renditions can also be opened and played in a stand-alone player by clicking the rendition name in the rendition section of the Rendition Information page. The player chosen is then determined by file format and helper application settings unique to your computer and browser, outside of Video Manager.



Accessing the Video Preferences Page

To access the Video Preferences page, perform these steps:

1. Access the **Rendition Information page** or open the **My Content Server** tray.
2. Click **Video Preferences**. The Video Preferences page is displayed.

Page Item	Description
Video Format Preference Order	Specifies the preferred media format used in the Rendition Information page preview section for renditions, as well as when clicking on a rendition's web-viewable link in a search result, digital asset basket, or content information page. Because a rendition set may not have a rendition in the preferred format, Video Manager will play the rendition using the first available format found in the order listed here. The NoPlayer option enables you to suppress one or more of the media formats here, depending on your preference. The placement of the NoPlayer option determines what media format is available. For example, if you move the NoPlayer option immediately following WindowsMedia, then all other formats are ignored. For more information, see the "No Format Option" on page 11-15.
Move Up	Moves a selected media format up in the preference order.
Move Down	Moves a selected media format down in the preference order.
Video Bandwidth Preference	Specifies the preferred size of streaming and local videos by using the size information from the rendition listing. **Low**—Smaller video best suited when connecting to Video Manager using a modem to dial in. **High**—Larger video best suited when connecting to Video Manager through a high speed connection, such a corporate network or broadband internet connection.
Max Keyframe Segment Length	Specifies the maximum number of keyframes displayed at each drill-down level in the storyboard section of a Rendition Information page.
Player Preference By Format	Enables you to specify a video player for each media format included in the list. For more information, see the "No Player Option" on page 11-16.
Update	Submits changes made to the Video Preferences page.

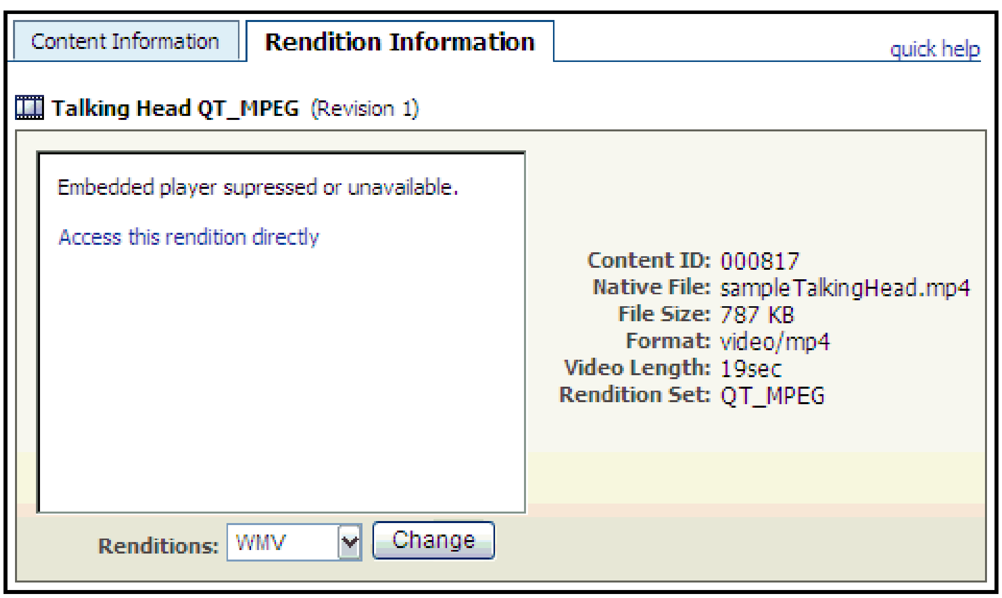
11.2.9.1 No Format Option

Depending on what priority you have assigned to the No Format option in the Video Format Preference Order section on the Video Preferences Page, the preview area of the Rendition Information Page page may or may not display the video preview player. For example, the following graphic illustrates that this rendition set does not contain any preferred video format. That is, all formats available in this set appear below the No Format option in the Video Format Preference Order which means that they have been suppressed.

11.2.9.2 No Player Option

The Player Preference By Format section of the Video Preferences Page enables you to set a video player for each media format included in the list. For example, if you set the preference for Quicktime to be No Format, then this option suppresses that format in the preview area of the Rendition Information Page page as illustrated in the following graphic. Clicking the Access this rendition directly link opens a new window and plays the video using the applicable default player.

> **Note:** The No Format Option placement will always override the selected settings for media formats listed in the Player Preference By Format section.



11.2.10 Working with Renditions

Digital Asset Manager not only creates renditions automatically, it provides a personal space where you can store renditions you are currently working on, called the digital asset basket. Your digital asset basket is unique to you, and contains only the renditions you choose to include.

You can add items to your digital asset basket from a search results page, from the Rendition Information page, or from the Content Information page. You can view the items in your digital asset basket by clicking **My Baskets** and then **Digital Asset Basket** in the **My Content Server** tray.

By design, the digital asset basket can contain renditions from different revisions of the same digital asset. If you use your basket to quickly find a rendition of an asset, such as a corporate logo or video, remember that you may not be accessing the most recent revision of the asset. If a newer revision has been checked into Content Server, a notification is displayed next to the revision number in the Description column. Clicking the notification displays the Content Information page of the latest revision.

You can do the following with renditions:

- Storing Renditions in Your Digital Asset Basket
- Viewing Items in Your Digital Asset Basket
- Removing Items from Your Digital Asset Basket
- Adding and Removing Renditions in a Rendition Set
- Downloading Multiple Items
- Creating Renditions
- Updating Renditions

11.2.10.1 Storing Renditions in Your Digital Asset Basket

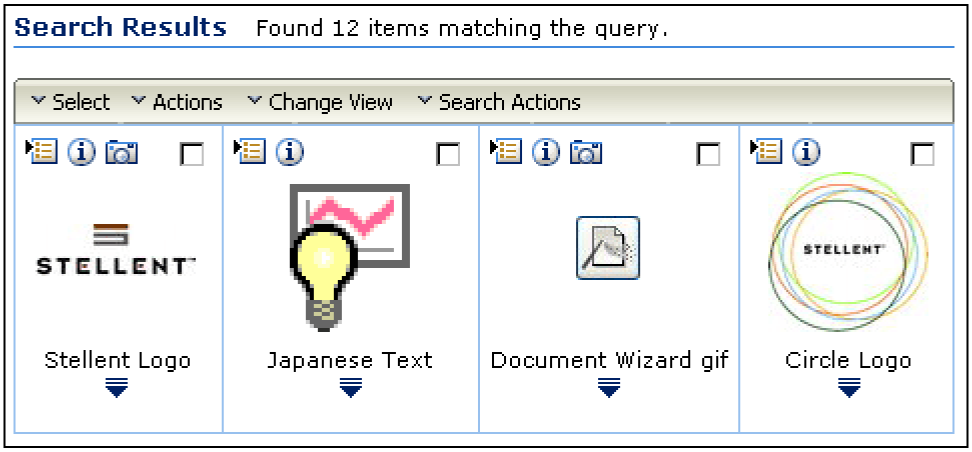
You can store any rendition from any revision of a digital asset in your digital asset basket, and the web-viewable or native file from any revision of a content item, provided the revision is released by Content Server.

From the digital asset basket, you can select renditions from one or multiple assets to be compressed into a single file and downloaded to a local or networked drive, or send links to selected renditions in an e-mail. You can also use the digital asset basket to access the content information and rendition information pages of content items and digital assets.

You can add items to your digital asset basket from the following pages:

- Rendition Information page (native file and all renditions)
- Content Information page (native and web-viewable files only)
- Search Results page (native and web-viewable files only)

When you add a rendition to the digital asset basket, it may not be listed at the top of the digital asset basket page. Items in the digital asset basket are listed in descending order first by content ID and then by revision number. If a rendition of a content item revision is already in the digital asset basket, additional renditions are added to that revision’s listing. Additionally, if a newer revision of a content item in your digital asset basket has been checked into Content Server, a notification is displayed next to the revision number in the Description column. Clicking the notification displays the Content Information page of the latest revision.



To add renditions to your digital asset basket from the Rendition Information page, perform these steps:

1. Access the rendition information page of an asset. The rendition information page is displayed.
2. Select the renditions to add to your digital asset basket by enabling the check box next to the rendition.
3. From the **Renditions** list, select **Add to Basket**. The Digital Asset Basket page is displayed with the renditions you selected listed in the Selected Renditions column of the item.

To add all renditions to your digital asset basket, select all items. You do not need to select the check box next to any rendition if using this option.

To add the native or web-viewable file to your digital asset basket from the Content Information page, perform the following steps:

1. Access the Content Information page of an item.
2. From the **Content Actions** menu, select one of these:
   - **Add Native File to Digital Asset Basket**, or
   - **Add Web-Viewable File to Digital Asset Basket**.

The Digital Asset Basket page is displayed with the selected items listed in the Selected Renditions column of the item.

You cannot add both the native file and the web-viewable file to the digital asset basket at the same time using the Content Information page. If the item is a digital asset and has a Rendition Information page, use it to add multiple items to the digital asset basket at the same time.

To add the native or web-viewable file to your digital asset basket from a search results page, perform the following steps:

1. From a search results page, select the check box next to the item or items you want to add to your digital asset basket.
2. From the **Content Actions** menu, select either of these items:
   - **Add Native Files to Digital Asset Basket**
   - **Add Web-Viewable Files to Digital Asset Basket**.

   The Digital Asset Basket page is displayed with the selected items listed in the Selected Renditions column of the item.

To add all native or web-viewable items on a search results page to your digital asset basket, select **All** from the **Select** menu. You do not need to enable the check box next to any item if using this option. Also, web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. They cannot be downloaded from the digital asset basket. To download a rendition, use the Rendition Information page.

11.2.10.2 Viewing Items in Your Digital Asset Basket

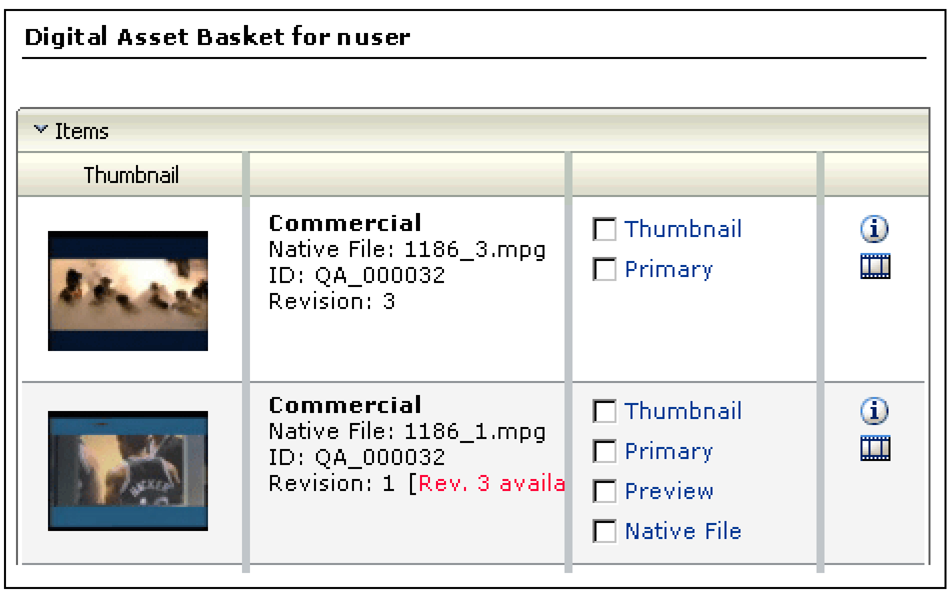
The digital asset basket is accessed by clicking **My Basket** and then **Digital Asset Basket** in the **My Content Server** tray. From the digital asset basket, you can select renditions from one or multiple assets to be compressed into a single file and downloaded to a local or networked drive, or send links to selected renditions in an e-mail. You can also use the digital asset basket to access the content information and rendition information pages of content items and digital assets.

To access the Digital Asset Basket page, perform these steps:

1. Open the **My Content Server** tray.
2. Click **My Baskets**.
3. Click **Digital Asset Basket**.

   The digital asset basket page is displayed.

Digital Asset Basket Page



Page Item	Description
Thumbnail	Opens the web-viewable rendition in a separate window. The web-viewable rendition is specified by your system administrator, and is typically larger than the thumbnail or preview renditions. And for video assets the web-viewable rendition is determined by the choices made on the Video Preferences Page.

Page Item	Description
Description	Title, native file, Content ID, and Revision metadata of the content item. If a newer revision of the content item has been checked into Content Server, a notification is displayed next to the revision number. Clicking the notification displays the Content Information page of the latest revision.
Selected Renditions	Listing of all renditions of a content item saved to the digital asset basket.
Content Info icon	Links to the Content Information page of an item.
Rendition Info icon	Links to the Rendition Information Page of an item.
Items menu	■ **Download**—Bundles the selected items into a single compressed file and copies the file to a local or networked storage space. Web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. They cannot be downloaded from the digital asset basket. To download a rendition, use the Rendition Information Page. ■ **E-mail Links**—Opens a prompt that enables the user to enter one or more e-mail addresses. Then the e-mail is generated and sent from within the server, after which a confirmation page is shown that displays the format of the e-mail. The URL links to the selected items are copied into the body of a new message. ■ **Remove**—Removes the selected items from the digital asset basket. ■ **Empty Basket**—Removes all items from the digital asset basket.

Items in the digital asset basket are listed in descending order first by content ID and then by revision number. If a rendition of a content item revision is already in the digital asset basket, additional renditions are added to that revision's listing.

11.2.10.3 Removing Items from Your Digital Asset Basket

Your digital asset basket is meant to store renditions to which you currently need access. Because you can store renditions from different revisions of a digital asset in the digital asset basket, renditions listed in the digital asset basket are not necessarily the latest revision. It is a good idea to remove the renditions from your digital asset basket when you are no longer working with them.

You can store a link to the most recent revision of any content item in Content Server by searching for the item's content ID, then selecting **Save Search** from the **Content Actions** menu on the search result page. This saves the search as a link in the My Saved Queries folder in your **My Content Server** tray. Click the saved search link to always access the most recent revision of a content item.

To remove individual renditions from your digital asset basket:

1. Open the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.

   The digital asset basket page is displayed.

2. Enable the check box next to the renditions to be removed in the Selected Renditions column on the digital asset basket page.

3. Select **Remove** from the **Items** menu.

   The items are removed from the digital asset basket.

To remove all items from your digital asset basket:

1. Open the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.

   The digital asset basket page is displayed.

2. Select **Empty Basket** from the **Items** menu.

   All items in the digital asset basket are removed. You do not need to enable the check box next renditions when removing them all from your basket.

Removing renditions and other items from your digital asset basket does not remove them from Content Server. Renditions and other items can be removed from Content Server using the Rendition or Content Information pages. Renditions and other items listed in your digital asset basket are not available if they have been removed from Content Server.

11.2.10.4 Adding and Removing Renditions in a Rendition Set

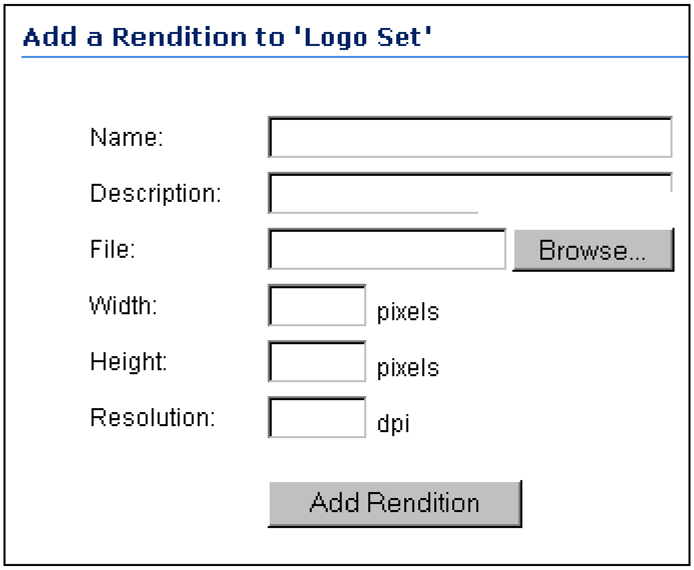
Digital Asset Manager automatically creates multiple renditions of digital assets and manages them in Content Server under one content ID. This provides the content management and workflow benefits of Content Server while ensuring that you have access to all the types of renditions you need. One content ID provides single-point access to all items relevant to the digital asset.

In some situations, you may want to associate an additional rendition or other file to a digital asset, or remove a rendition that is no longer useful. For example, you may need a rendition that is a slightly different size than the one created by the rendition set, or uses a different color palette, so you want to add the new one and remove the old one. Or, you may have a text file with instructions to a vendor on how they are to use a logo. Files such as these can be added to a digital asset's existing set of renditions using the Add a Rendition page, accessed from the Rendition Information page, and removed directly from the Rendition Information page.

Add a Rendition Page

The Add a Rendition page is accessed from the **Renditions** menu on the Rendition Information page of an asset. An added rendition is assumed to be a graphic file, and metadata fields on the Add a Rendition page allow you to manually add information pertinent to graphic renditions. Added renditions can be any type of file, however. For example, if you have a text file with instructions on how to output a PDF file, you can attach the text file as a rendition of the original asset. You should note, though, that Content Server does not manipulate added renditions. It does not modify a rendition based on information entered into the metadata fields, nor does it convert an added rendition to a web-viewable format, nor index it for searching.

- Metadata on the Add a Rendition page is for information only. It does not change the size of an added graphic file, and it does not get indexed for searching.
- Any type of file can be added as a rendition. It does not have to be a graphic file. To view added renditions, you must have the native application or suitable viewer for the added rendition's file format.



Page Item	Description
Name	A descriptive name given to the attached file, listed in the Rendition Name column on the Rendition Information page.
Description	Description of the attached file, listed on the Rendition Information page when the Rendition Name Description icon is clicked.
File	Used to locate the file to be attached.
Width	Used to specify the width of the attached file in the Dimensions column on the Rendition Information page. This assumes the attachment is a graphic file.
Height	Used to specify the height of the attached file in the Dimensions column on the Rendition Information page. This assumes the attachment is a graphic file.
Resolution	Used to specify the resolution of the attached file in the Resolution column on the Rendition Information page. This assumes the attachment is a graphic file.

To add a rendition to an existing rendition set:

1. Access the Rendition Information page.
2. Select **Add New Rendition** from the **Renditions** menu. The Add a Rendition page is displayed.
3. Enter a name for the rendition in the **Name** field (required). The name is displayed in the Rendition Name column of the Rendition Information page.
4. Enter a description for the rendition in the **Description** field (optional). The description is displayed when the Rendition Name Description icon in the Rendition Name column of the Rendition Information Page page is clicked.
5. Click **Browse** to locate the rendition or other file you want to add to the rendition set (required). It can be any type of file.

6. Fill in the pixel dimensions and resolution information in the **Width**, **Height**, and **Resolution** fields (optional).
7. Click **Add Rendition**. The Rendition Information page is displayed, showing the added rendition.

   Metadata on the Add a Rendition page is for information only. It does not change the size of an added graphic file, and it does not get indexed for searching.

To delete a rendition from an existing rendition set:

1. Access the Rendition Information page.
2. Enable the check box next to the name or name of the rendition you want to delete. You can select multiple renditions to delete.
3. Select **Delete** from the **Renditions** menu. The Rendition Information page is displayed without the deleted rendition.

   Renditions and other items are not available if they have been removed from Content Server. When a rendition is deleted from the system, it disappears from the basket display.

11.2.10.5 Downloading Multiple Items

Renditions and other content items can be compressed into a single file and downloaded to a local or networked drive. This is useful when you want to send a number of renditions or native files to others. This can be done from the Digital Asset Basket page or Rendition Information page.

To download multiple renditions:

1. Access the digital asset basket or Rendition Information page.
2. Enable the check box next to the renditions you want to download. The renditions are listed in the Selected Renditions column of the Digital Asset Basket page, or the Rendition Name column of the Renditions Information page.
3. Select **Download** from the **Renditions** menu on the Rendition Information page or from the **Items** menu on the Digital Asset Basket page.
4. Follow the download instructions as they are displayed on screen.

Notes:

- To download all renditions in your digital asset basket, or on the Rendition Information page, select all items, and then select the **Download** menu option. You do not need to enable the check box next to any rendition if using this option.
- Web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. They cannot be downloaded from the digital asset basket. To download a rendition, use the Rendition Information page.
- Renditions and other items can be removed from Content Server using the Rendition or Content Information pages.

11.2.10.6 Creating Renditions

Renditions are created automatically when a digital asset is checked in. The types of renditions created are determined by criteria defined in the selected rendition set.

To create renditions:

1. Access the Content Check In form.
2. Select a rendition set from the Rendition Set list.
3. Enter a title and any additional metadata for the asset.
4. Click **Browse** to locate the primary file.
5. Click **Check In**. The Check In Confirmation page is displayed.

Notes

- Content Server uses the file extension, such as .psd, .jpg, .mov, or .avi, to determine if an item is a digital asset. You must make sure that all digital assets checked in to Content Server have the correct file extension amended to the file name. For example, a Photoshop file named CorporateLogo.psd will be correctly identified by Content Server as a digital asset, but one named CorporateLogo will not be.
- Do not select an alternate file when checking in a digital asset. Doing so prevents the primary file from rendering.

11.2.10.7 Updating Renditions

If an incorrect rendition set was selected when a digital asset was checked in, or if a new rendition set has been created, you may want to update the renditions created for a digital asset.

If you want to update to a different rendition set, perform these steps:

1. Select **Update** from the **Content Actions** menu on the Content Information page.
2. Select a different rendition set from the Rendition Set list.
3. Click **Submit Update**. The Content Information page is displayed.

Notes

- Rendition information cannot be displayed while an asset is being processed by Content Server and Digital Asset Manager. If an asset is still being processed, the status in the revision history on the Content Information page is listed as GenWWW, and the Rendition Information page displays a message saying the content item is not released yet.
- Updating a rendition set replaces the previous renditions with a new set, effectively removing the previous set from Content Server.

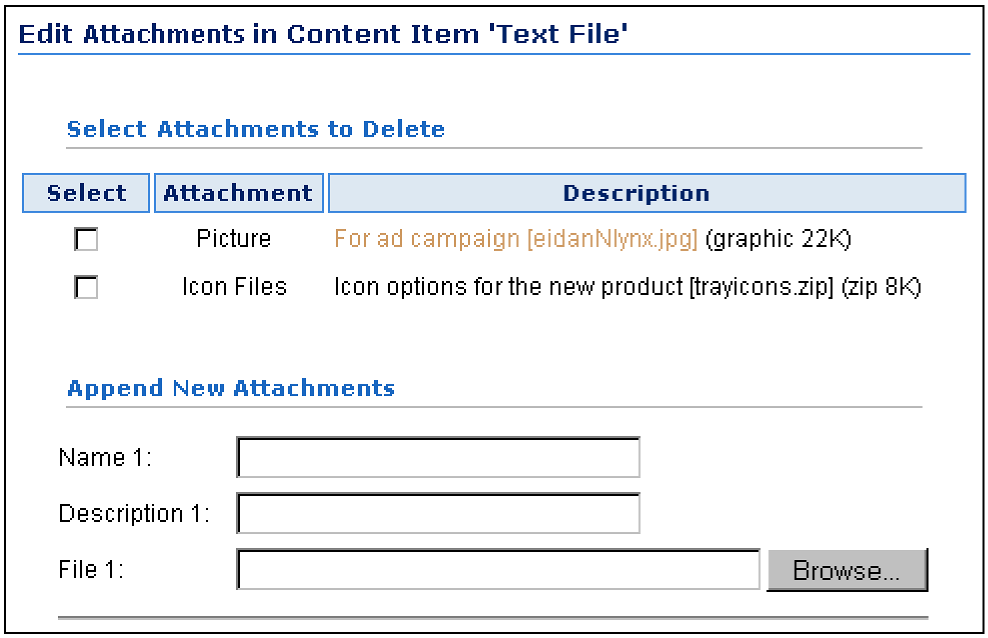
11.2.11 Working With Standard Content Items

Digital Asset Manager adds functionality to Content Server that extends to content items that are not digital assets. You can add native and web-viewable versions of content items to your digital asset basket, and add or delete attachments to content items from the Content Information page.

Add/Edit Attachments

In some situations, you may want to associate an additional rendition or other file to a content item that is not a digital asset, or remove an attachment that is no longer useful. For example, you may attach a customer's new logo to a piece of collateral in which it is used and remove the old one, or you may attach a text file with project contact information to a project plan. Files such as these can be added to a content item using the Add/Edit Attachments page, accessed from the **Content Actions** menu on the Content Information page. Attached files are not converted to a web-viewable format, and are not indexed for searching by Content Server.

Figure 11–12 Adding or Editing an attachment with the Edit Attachments page



Page Item	Description
Attachment column	Lists the name given to an existing attached file at the time it was attached.
Description column	Lists the description given to an existing attached file at the time it was attached.
Name field	Used to enter the name of the file to be attached. Displayed in the Attachments section of the Content Information page.
Description field	Used to enter the Description of the file to be attached. Displayed in the Attachments section of the Content Information page.
File field	Used to locate the file to be attached.
Add/Edit Attachment Button	Submits the information to Content Server.

To add an attachment to a content item:

1. Access the Content Information page.
2. Select **Add/Edit Attachments** from the **Content Actions** menu. The Add/Edit Attachments page is displayed.
3. Enter a name for the attachment in the **Name** field (required). The name is displayed in the Attachments section of the Content Information page.
4. Enter a description for the rendition in the **Description** field (optional). The description is displayed in the Attachments section of the Content Information page.
5. Click **Browse** to locate the rendition or other file you want to attach to the content item (required). It can be any type of file.
6. Click **Add/Edit Attachments**. The Content Information page is displayed, showing the attached file in the Attachments section.

   Metadata on the Add/Edit Attachments page is for information only. It does not get indexed for searching.

To delete an attachment from a content item:

1. Access the Content Information page.
2. Select **Add/Edit Attachments** from the **Content Actions** menu. The Add/Edit Attachments page is displayed.
3. Enable the check box next to the name or name of the attachment you want to delete. You can select multiple attachments to delete.
4. Click **Edit Attachments**. The Content Information page is displayed without the attachment.

11.2.12 Digital Asset Manager on a Macintosh Client

Digital Asset Manager will render digital assets when checked in using a Macintosh client provided the filename of the asset has a valid file extension. However, files created on Macintosh operating systems prior to OS X may have information stored in a file resource fork. Information in a resource fork is not transferred. This may include custom fonts used by the file.

Depending on your organization’s needs, removing the resource fork generally does not create a problem. One exception to this is if the asset uses custom fonts and the rendition set includes a PDF rendition.

11.3 FlipFactory Supported Formats

Digital Asset Manager currently supports use of Telestream’s FlipFactory for video conversion. Visit the Telestream site or consult the FlipFactory help system for additional documentation on FlipFactory (www.telestream.net).

Formats supported by the video conversion application must also be associated with Content Server by the system administrator using the Content Server Configuration Manager. See your system administrator if a supported format is not being rendered.

FlipFactory supports the following formats:

- Streaming Media Formats
- Broadcast Media Formats
- Professional Media Formats

11.3.1 Streaming Media Formats

Format	Description
3GP Media Format	.3gp
Flash Media Format	.flv
MPEG Layer 3 Elementary Stream Media Format	MPEG Layer 3 is compliant with the MPEG-3 global standard; it interoperates with MPEG-3 compliant hardware and software from other companies.
MPEG Layer 4 Elementary Stream Media Format	MPEG Layer 4 is compliant with the MPEG-4 global standard; it interoperates with MPEG-4 compliant hardware and software from other companies.
PacketVideo MPEG4 Format	PacketVideo MPEG-4 is compliant with the MPEG-4 global standard; it interoperates with MPEG-4 compliant hardware and software from other companies. PacketVideo MPEG-4 is compliant with the following standards: MPEG-4 (ISO/IEC), H.263 baseline (ITU), 3G-324M (3GPP), RTSP/RTP/RTCP (IETF).
QuickTime Media Format	FlipFactory uses the Basic Sorenson codec by default. If the Sorenson codec is to be used for professional work, Telestream recommends that you replace the Basic Sorenson codec with the Sorenson Professional codec. The Professional codec may be obtained directly from Sorenson at www.sorenson.com.
QuickTime Streaming Format	FlipFactory uses the Basic Sorenson codec by default. If the Sorenson codec is to be used for professional work, Telestream recommends that you replace the basic codec with the Sorenson Professional codec. The Professional codec may be obtained directly from Sorenson at www.sorenson.com.
VideoClipStream Media Format	.asf
WAVE Audio Media Format	.wav
Windows Media Format	.wmf

11.3.2 Broadcast Media Formats

Format	Description
Abekas 6000 Format	Connection to an Abekas 6000 server is via its network ports: 10/100 Ethernet, Gigabit Ethernet, or Fibre Channel. Contact Accom or Telestream technical support for details.
Grass Valley Group Profile GXF Media Format	Connection to Grass Valley Group server's real-time system must be made via a 10/100 Ethernet card (XP) or Fibre Channel (PDR and XP). Contact the Grass Valley Group or Telestream technical support for details. Profile Direct Convert Codec Profile Direct Convert video codec converts any MPEG2 video directly into Grass Valley Profile format. This does not require decoding to baseband and then re-encoding to the new format. The media file is deconstructed from one format and reconstructed into the Profile format. Generally this will be done many times faster than real time. The video profile, GOP structure and bit rate are retained. For example, If the input file is standard MPEG2 50Mbps, I-frame only, then the resulting converted file will be GVG GXF 50Mpbs I-frame only.
Leitch Media Format	
MXF Media Format	.mxf
Omneon Media Format	.omf
SeaChange Media Format	
Sony MAV70 Media Format	
Vortex Media Format	

11.3.3 Professional Media Formats

Format	Description
AVI Media Format	
Avid OMF Media Format	
Avid TransferManager DV Media Format	
ClipMail MPEG Format	
DV Stream Media Format	
DVD Stream Media Format	
IPV SpectreView Media Format	
MPEG1 System Stream Media Format	
MPEG2 Program Stream Media Format	
MPEG2 Transport Stream Format	
MPEG4 Media Format	
MXF Stream Format	

Format	Description
Pinnacle Liquid Media Format	
Pinnacle MediaStream Media Format	
VOD Transport Stream Media Format	

11.4 Included Image Rendition Sets

Digital Asset Manager installs three predefined rendition sets for rendering image assets. By default, these rendition sets are configured for use with Oracle Outside In Technology (ImageExport).

If your system administrator has modified the default image rendition sets or set up Digital Asset Manager to use a different conversion application, then the rendition sets listed here might not be applicable. For more information regarding the conversion application used and any custom rendition set, check with your system administrator.

The predefined rendition sets follow:

- BasicRenditions
- ThumbnailOnly
- MultipleFormats

The `BasicRenditions` rendition set is required for Digital Asset Manager to function. Your system administrator can add or delete other rendition sets, depending on your company's needs.

11.4.1 BasicRenditions

Rendition Name	Rendition Description
Web	A 72 dpi JPEG no bigger than 800x600 pixels (primary web-viewable image)
Thumbnail	A 72 dpi PNG exactly 80 pixels high (displayed in the Classic and Thumbnail search results views)
Preview	A 72 dpi GIF exactly 250 pixels wide (displayed on Rendition Information page)

11.4.2 ThumbnailOnly

Rendition Name	Rendition Description
Thumbnail	A 72 dpi PNG exactly 80 pixels high

11.4.3 MultipleFormats

Rendition Name	Rendition Description
Web	A 72 dpi JPEG no bigger than 800x600 pixels
Thumbnail	A 72 dpi PNG exactly 80 pixels high
Preview	A 72 dpi GIF exactly 250 pixels wide
Jpeg2000	A 72 dpi JPEG 2000 no bigger than 800x600 wide
Tiff	A TIFF
Bitmap	A Bitmap

11.5 Oracle Outside In Technology Image Formats

Digital Asset Manager can be configured to work with many different conversion applications. By default, Digital Asset Manager provides predefined image asset rendition sets for use with Oracle Outside In Technology. To determine which conversion application is used by your organization, check with your system administrator. If it is Oracle Outside In Technology, the following output formats are available to you.

Formats supported by the graphic conversion application must also be associated with Oracle Content Server by the system administrator, using the Configuration Manager. If a supported format is not being rendered, see your system administrator.

For more information about Oracle Outside In Technology, see its Documentation Library web site at

http://download.oracle.com/docs/cd/E14154_01/index.htm

Format	Version
Raster Image	
CALS Raster (GP4)	Type I
CALS Raster (GP4)	Type II
Computer Graphics Metafile	ANSI
Computer Graphics Metafile	CALS
Computer Graphics Metafile	NIST
Encapsulated PostScript (EPS)	TIFF header only
GEM Image (Bitmap)	
Graphics Interchange Format (GIF)	
IBM Graphics Data Format (GDF)	1.0
IBM Picture Interchange Format	1.0
JBIG2	Graphic Embeddings in PDF
JFIF (JPEG not in TIFF format)	
JPEG	
JPEG 2000	JP2

Format	Version
Kodak Flash Pix	
Kodak Photo CD	1.0
Lotus PIC	
Lotus Snapshot	
Macintosh PICT	BMP only
Macintosh PICT2	BMP only
MacPaint	
Microsoft Windows Bitmap	
Microsoft Windows Cursor	
Microsoft Windows Icon	
OS/2 Bitmap	
OS/2 Warp Bitmap	
Paint Shop Pro (Win32 only)	5.0, 6.0
PC Paintbrush (PCX)	
PC Paintbrush DCX (multi-page PCX)	
Portable Bitmap (PBM)	
Portable Graymap PGM	
Portable Network Graphics (PNG)	
Portable Pixmap (PPM)	
Progressive JPEG	
StarOffice Draw	6.x – 8.0
Sun Raster	
TIFF	Group 5 & 6
TIFF CCITT	Group 3 & 4
TruVision TGA (Targa)	2.0
WBMP wireless graphics format	
Word Perfect Graphics	1.0
X-Windows Bitmap	x10 compatible
x10 compatible	x10 compatible
X-Windows Pixmap	x10 compatible
WordPerfect Graphics	1.0 - 10.0
Vector Image	
Adobe Illustrator	4.0 - 7.0, 9.0
Adobe Illustrator (XMP only)	11 – 13 (CS 1 – 3))
Adobe InDesign (XMP only)	3.0 – 5.0 (CS 1 - 3)
Adobe InDesign Interchange (XMP only)	
Adobe Photoshop (XMP only)	8.0 – 10.0 (CS 1 – 3)
Adobe PDF	1.0 – 1.7 (Acrobat 1 - 9)

Format	Version
Adobe Photoshop	4.0
Ami Draw	SDW
AutoCAD Drawing	2.5, 2.6
AutoCAD Drawing	9.0 – 14.0
AutoCAD Drawing	2000i - 2007
AutoShade Rendering	2
Corel Draw	2.0 – 9.0
Corel Draw Clipart	5.0, 7.0
Enhanced Metafile (EMF)	
Escher graphics	
FrameMaker Graphics (FMV)	3.0 – 5.0
Gem File (Vector)	
Harvard Graphics Chart DOS	2.0 – 3.0
Harvard Graphics for Windows	
HP Graphics Language	2.0
IGES Drawing	5.1 – 5.3
Micrografx Designer	through 3.1
Micrografx Designer	6.0
Micrografx Draw	through 4.0
Microsoft XPS (Text only)	
Novell PerfectWorks Draw	2
OpenOffice Draw	1.1 – 3.0
Visio (Page Preview mode WMF/EMF)	4.0
Visio	5.0 - 2007
Visio XML VSX (File ID only)	2007
Windows Metafile	

A User Interface

This chapter contains information about the user interface for Content Server. The following screens are described in this chapter:

A.1 Getting Started Screens

This section describes the screens used when beginning to use the Content Server.

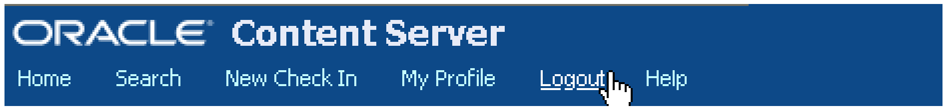
> **Note:** If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topic:

- "ExtranetLook Component Logout Option" on page A-1

A.1.1 ExtranetLook Component Logout Option

The optional ExtranetLook component adds the ability to customize the look and feel of Content Server for anonymous users, and adds logout functionality to Content Server.



If the optional ExtranetLook component is installed, then a Logout link is added to the toolbar at the top of a Content Server instance.

A.2 Search Pages

This section describes the screens used when performing Content Server searches.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

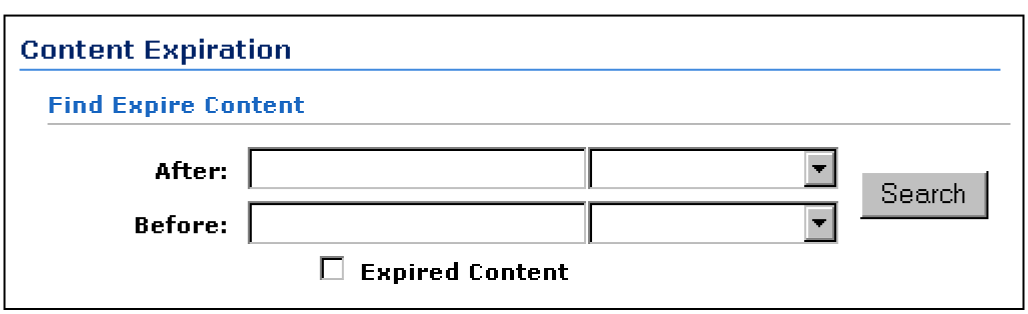
This section covers the following topics:

- "Expired Content Page" on page A-2
- "Quick Search Field" on page A-3
- "Home Page Search Fields" on page A-4
- "Search Tray" on page A-5
- "Advanced Search Page" on page A-7
- "Query Builder Form" on page A-9
- "Results Options" on page A-10
- "Search Results Page" on page A-11
- "Custom Description Column for Search Result Templates" on page A-13
- "Thumbnail View Advanced Options" on page A-14

A.2.1 Expired Content Page

You cannot search for expired content unless you have administrative rights or if your system administrator has granted you specific rights to view and work with expired content.

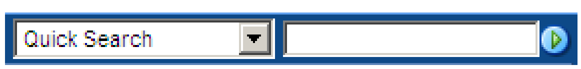
To display the Expired Content page, click the **Content Management tray**, and click **Expired Content**.



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

A.2.2 Quick Search Field

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



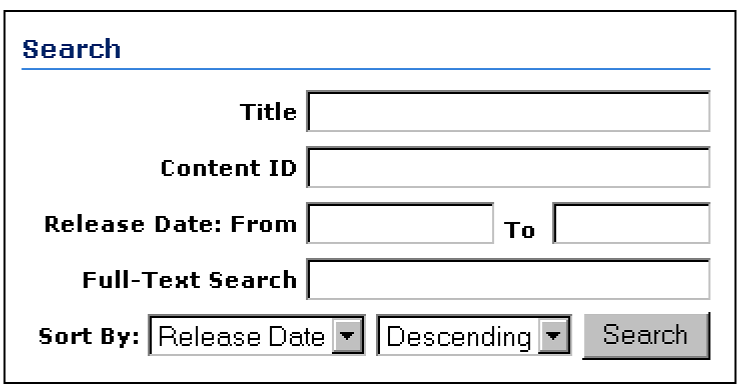
Note: If you have changed your layout to the Classic layout, you may need to enable the Quick Search field by selecting the Quick Search check box on your Adding Links to Favorites page.

Item	Description
Text entry field	Enter search terms in this field for searching the title and content ID metadata, as well as the full-text index.

Item	Description
Quick Search Action icon	Displays the Quick Search Actions menu, which lists the available searches and links to edit them or clear the current selection. Once selected, the search remains persistent until it is cleared or replaced. The name of the selected search is displayed to the left of the icon. If the search is cleared, a quick search reverts to the default behavior of searching content ID, title, and full-text (if enabled.) **Quick Search List**: Displays a list of available searches. Selecting a search enables it in the quick search field. **Clear Selection**: Clears the current quick search and returns the quick search field to the default behavior. **Edit**: Displays the available searches, from which you can add additional edit existing quick searches.
Quick Search button	Displays a search results page that lists the content items that contain the search terms.
XML Document Type list	Provides a list of selectable XML document types. By default, the searchxml option is selected. If an XML document type is not selected from the list, the component performs a metadata search in the stored documents and returns all results. In this case, there are no limits on the query. If you select one or more document types and enter a search term in the text entry field, the component performs a full-text search in the selected document types. To support full-text searches, at least one XML document type must be selected. Any document type included in the list indicates that it has been full-text indexed.

A.2.3 Home Page Search Fields

The home page search fields enable you to perform a metadata search, full-text search, or a combination of both from the content server Home Page.



Only the most commonly used search fields are available from the home page.

Element	Description
Title field	A descriptive name for the content item.
Content ID field	The unique identifier for the content item.

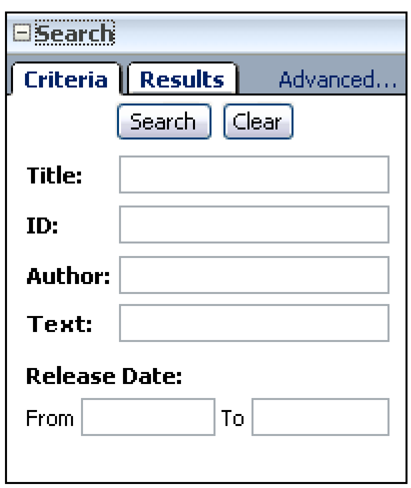
Element	Description
Release Date fields	The date that the item was released to the content server. **From**: The search finds items released on or after this date. **To**: The search finds items released before (but not on) this date.
Full-Text Search field	Enter full-text search terms. If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.
Sort By list	Specifies the field that the search results will be sorted on: **Release Date (default)**: Sorts by the Release Date metadata field. **Title**: Sorts alphabetically by the Title metadata field.
Order list	Specifies the sort order of the search results: **Descending (default)**: Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order. **Ascending**: Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order.
Search button	Displays a list of the content items that match the search criteria on a Search Results Page.

A.2.4 Search Tray

The Search Tray is used to perform a metadata, full-text, or combination search from the content server's Portal Navigation Bar. Clicking the Search tray expands or collapses the tray.

A.2.4.1 Criteria Tab

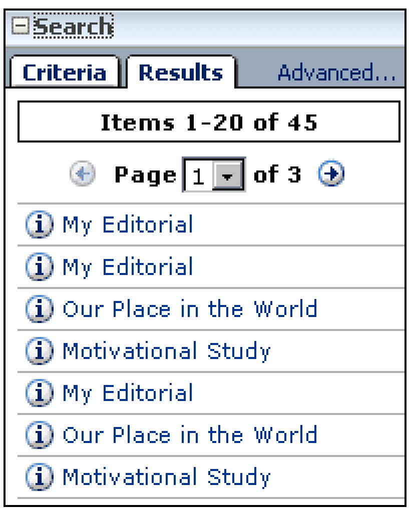
The Criteria tab on the Search Tray displays the form in which you enter your search criteria.



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

A.2.4.2 Results Tab

The Results tab in the Search Tray is the area where a listing of search results based on the criteria entered in the criteria tab is displayed.



The search results remain in the results tab until a new search is performed or the page is refreshed.

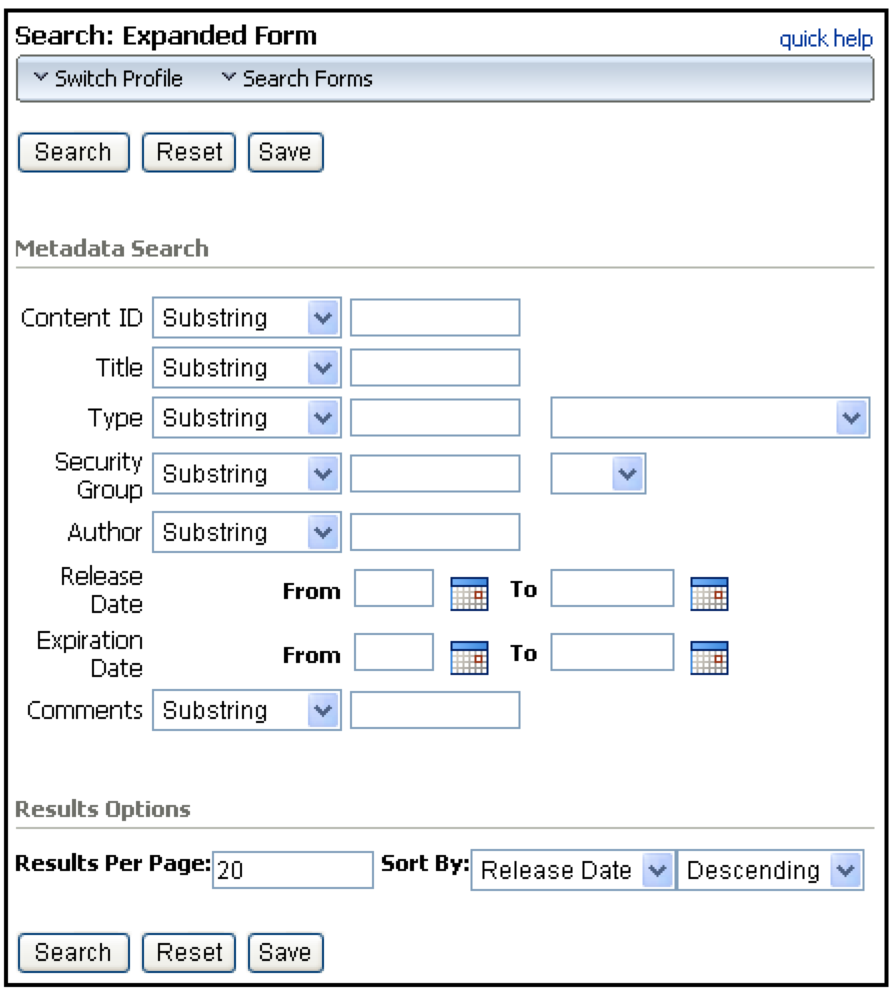
Element	Description
Advanced	Displays the Advanced Search Page.
Previous	Returns the search results tab back to the previous results page.
Next	Advances the search results tab to the next page of results.
Arrow buttons	**Forward**: Advances to the next search results page in a series. **Back**: Returns to the previous search results page in a series.
Info icon	Displays the content information of the corresponding content item.
ID field	The unique identifier for the content item.

Element	Description
Text field	Enter full-text search terms.
Release Date fields	The date the item was released to the content server. **From**: The search finds items released on or after this date. **To**: The search finds items released before (but not on) this date.

A.2.5 Advanced Search Page

The advanced search page enables you to build a search using either the Expanded Form to view all criteria options, or the Query Builder Form to select search criteria from menus as required. The Query Builder Form also allows you to manually edit the query text.

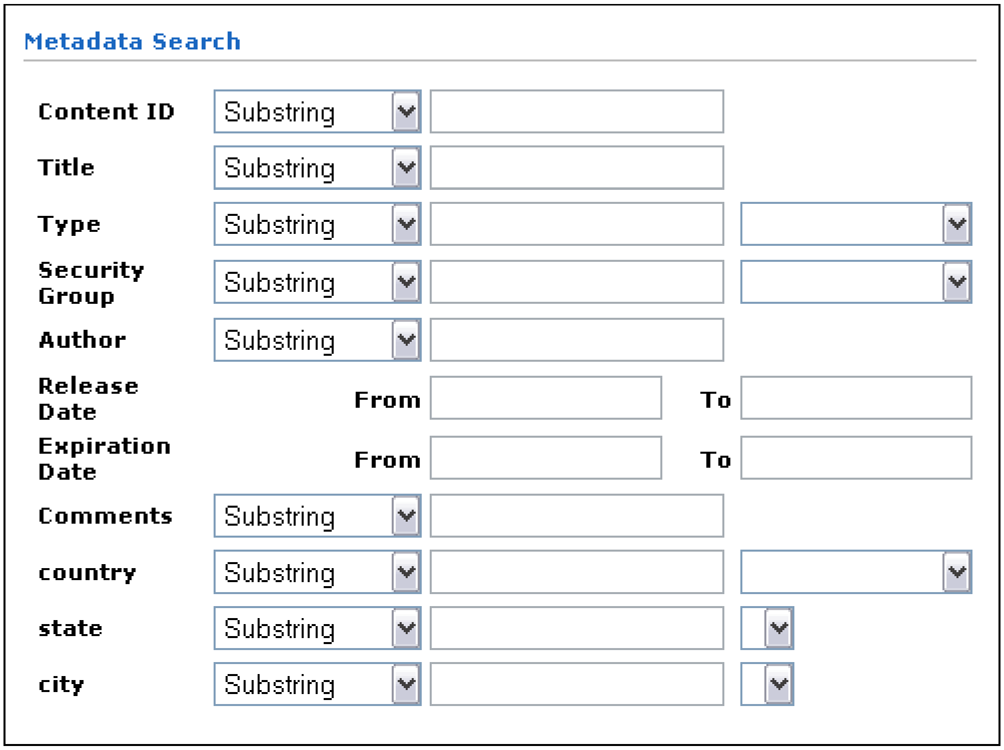
> **Note:** When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form.



To access this page, click the **Advanced link** under the Search Tray or the **Search** link on the toolbar.

A.2.5.1 Expanded Form

The expanded form on the Advanced Search Page displays all search fields available to you on a single page.



You can alternate between the expanded form and the Advanced Search Page using the Actions menu at the top of the search page.

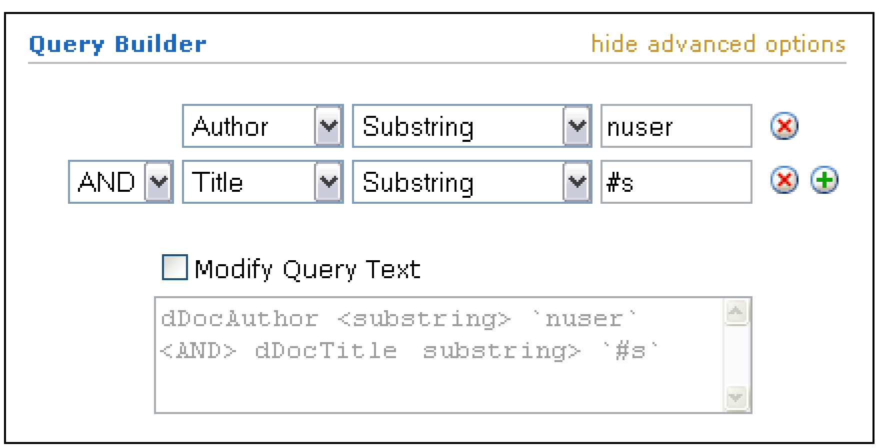
Element	Description
Search button	Displays a list of the content items that match the search criteria on a Search Results Page. If no search criteria are specified, a list of all content items is displayed.
Clear button	Clears the search fields, but does not reset the results options settings.
Save button	Saves the search as a saved query link in the Portal Navigation Bar. You are prompted to enter a title for the link.
Full-Text Search field (optional)	Enables you to search for words within content items. Also evaluates IdocScript. If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.
Content ID	The unique identifier for the content item.
Title	A descriptive name for the content item.
Type	The category of the document. You can enter text or select from the list of predefined values.

Element	Description
Security Group	An identifier that specifies access permission to the content item. You can enter text or select from the list of predefined values.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Author	The user who checked in the current content item revision.
Release Date	The date that the current revision was released to the content server. **From**: The search finds content items released on or after this date. **To**: The search finds content items released before (but not on) this date.
Expiration Date	The date that the content item will no longer be available for searching or viewing in the content server. **From**: The search finds content items that will expire on or after this date. **To**: The search finds content items that will expire before (but not on) this date.
Comments	Additional notes about the content item.
Results Options	Enables you to specify how search results are displayed.
Quick Help button	Displays the help topic specific to the advanced search page.

Note: The Search Tray and Advanced Search Page enable you to search on the standard metadata fields. If custom metadata fields have been created for your content server system, they typically will be displayed below the standard metadata fields.

A.2.5.2 Query Builder Form

The Query Builder form enables you to easily build and save complex queries by selecting options from a series of lists.



Element	Description
show/hide advanced options	Toggles between displaying and hiding the Modify Query Text check box and Query Text field.
Metadata lists	Allows you to choose metadata fields for searching one field at a time.
Add/Delete icons	Control the display and use of metadata lists. **Add**: Displays an additional metadata field below the current field. **Delete**: Hides the selected metadata field and removes any query text entered into the field.
Operators	Provide easy selection of search options. Available search operators are dependent on the type of search engine being used.
Modify Query Text	Controls whether the Query Text field is available for entering text directly into the query. **Enabled**: Text can be entered directly into the query text field. **Disabled**: Query text can be seen as gray text, but cannot be edited directly.
Query Text field	Displays the query text as it is being built, or allows user to enter text directly into a query, provided the Modify Query Text check box is enabled.

A.2.6 Results Options

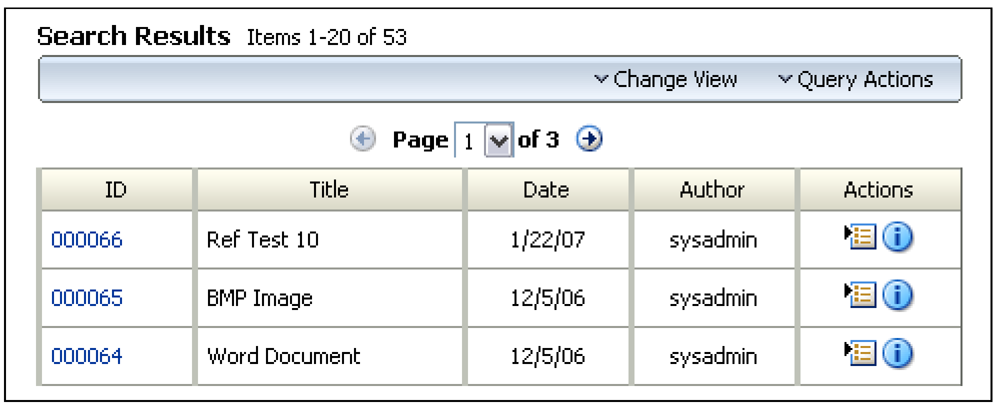
The Results Options area of the Advanced Search Page is used to control the display of the Search Results page.

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

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

A.2.7 Search Results Page

The search results page displays a list of content items that match the criteria specified during a search.



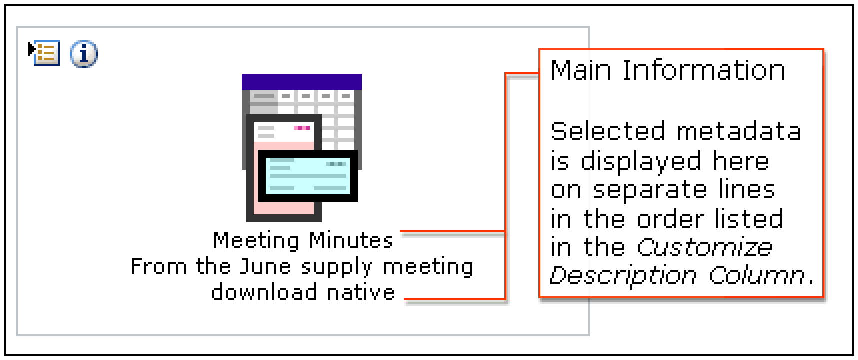
You can control how your search results page looks by choosing a default search template on your User Profile Page. You can also change the template by selecting a different view option from the Action choice list on the search results page.

Element	Description
Found *x* items matching the query	Shows the number of content items that match the search criteria.
Arrow buttons	**Forward**: Advances to the next search results page in a series. **Back**: Returns to the previous search results page in a series.

Element	Description
Action Menus	**Search Actions:** Allows you to select an action to perform on the search results list. Actions include saving the search to the My Content Server tray, or searching within the listed results. **Change View:** Allows you to select a different viewing option for the list: ■ **Classic**: A thumbnail image and descriptive text is displayed. ■ **Thumbnail**: A thumbnail image is displayed. ■ **Headline**: A single line list of search results with no thumbnail image is displayed. ■ **Custom View**: Displays custom search results based on a custom list template created on the Create/Edit Classic View Search Result Template Page.
ID column	Displays the content ID of a content item. Clicking the content ID of a selected item either displays a web-viewable version of the content, or prompts you to select to save the file to your local drive or open the document with an associated program.
Title column	Displays the title of a content item.
Date column	Displays the date that content item was checked in.
Author column	Displays the author of the content item.
Actions column	Includes the Info icon and the Actions Menu icon. **Info**: Displays the Content Information Page for the selected content item. **Item Actions Menu**: Contains the following options: ■ The Content Information link displays the Content Information Page for the selected content item. ■ The Check Out link checks out the selected content item and displays the Check-Out Confirmation Page. ■ The Check In Similar link displays the Content Check-In Form with some metadata fields already filled in. ■ The Send Link by E-mail link opens a new e-mail message that contains a URL to the selected content item.
Thumbnail (Thumbnail and Classic views)	Displays a small image of the content item or an icon indicating the content type of the content item. Clicking the thumbnail of a selected item either displays a web-viewable version of the content, or prompts you to select if you want to save the file to your local drive or open the document with an associated program.
Description column (Classic view)	Shows the content ID and title of the content item. Clicking the content ID link displays the web-viewable file.
Rev. link (Classic view)	Shows the latest released revision of the content item. Clicking the link displays the Revision History.
Info icon (Classic view)	Displays the Content Information Page for the content item.

A.2.8 Custom Description Column for Search Result Templates

This area determines what content is displayed in the description column of a Headline View search result template. The Description field must be selected in the Customize Columns section for display on a search results page for this section to have any effect. For information about thumbnail view advanced options, see "Thumbnail View Advanced Options" on page A-14.



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

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

A.2.9 Thumbnail View Advanced Options

The following table lists the thumbnail view advanced options. For more information about the description column content, see "Custom Description Column for Search Result Templates" on page A-13.

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

A.3 Referenced Links Interface (optional)

This functionality is not available unless the Link Manager component has been added by your system administrator.

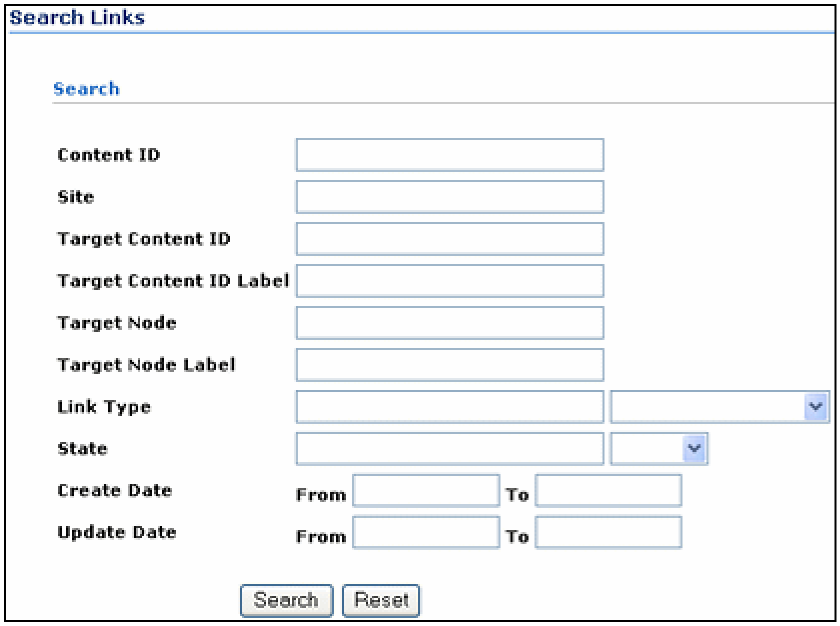
> **Note:** If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section describes the following screens:

- "Search Links Page" on page A-14
- "Link Search Results Page" on page A-16
- "Item Actions Menu" on page A-16
- "Link References on Content Information Page" on page A-17
- "Link Info Page" on page A-18

A.3.1 Search Links Page

The Search Links page is used to search for links, using criteria stored in the content server repository database.



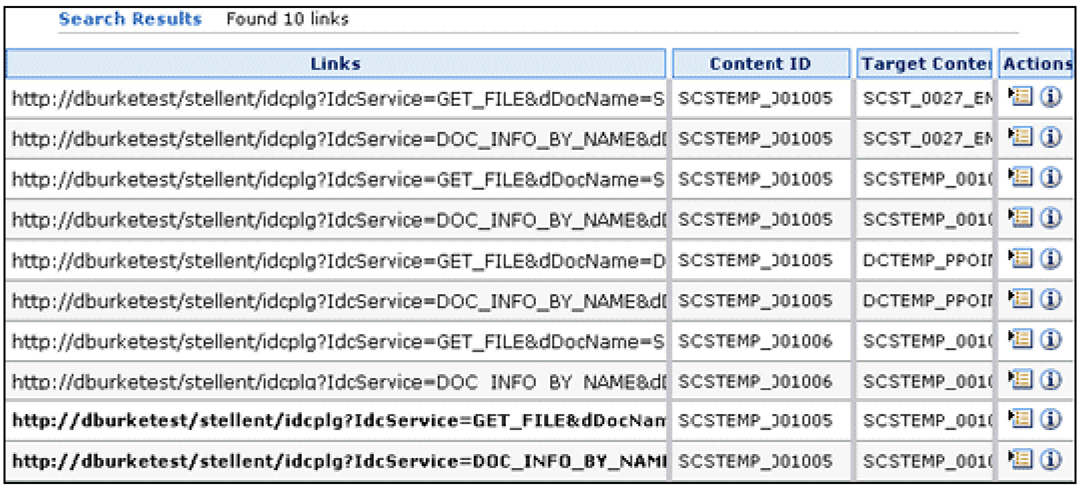
The Search Links page is useful for finding valid or invalid links, to determine where a resource is being used, or to determine how deleting a content item would affect other documents linking to it, etc. If the optional Links Manager component is installed, you can access the Search Links page by clicking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

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

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

A.3.2 Link Search Results Page

This page displays the results of a link search. Links that are invalid or broken in a Link Search Results Page are listed using bold font.


Search Results Found 10 links

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

The Link Manager-specific Item Actions Menu and Info icons are available in the Actions column. Clicking the **Info** icon displays the Content Information page of the document containing the link.

A.3.3 Item Actions Menu

Clicking the **Actions** icon displays the applicable link management menu.

The menu options include:

- **Content Information**: Displays the Content Information page of the document containing the link. This Content Information page contains a References toggle switch that displays (Show option) or hides (Hide option) any related links contained in or links to this content item.

- **Target Content Info**: Displays the Content Information page of the document referenced by the link. Again, this Content Information page contains a References toggle switch that displays or hides any related links contained in or links to this content item.
- **Link Info**: Displays the Link Info Page for this link.

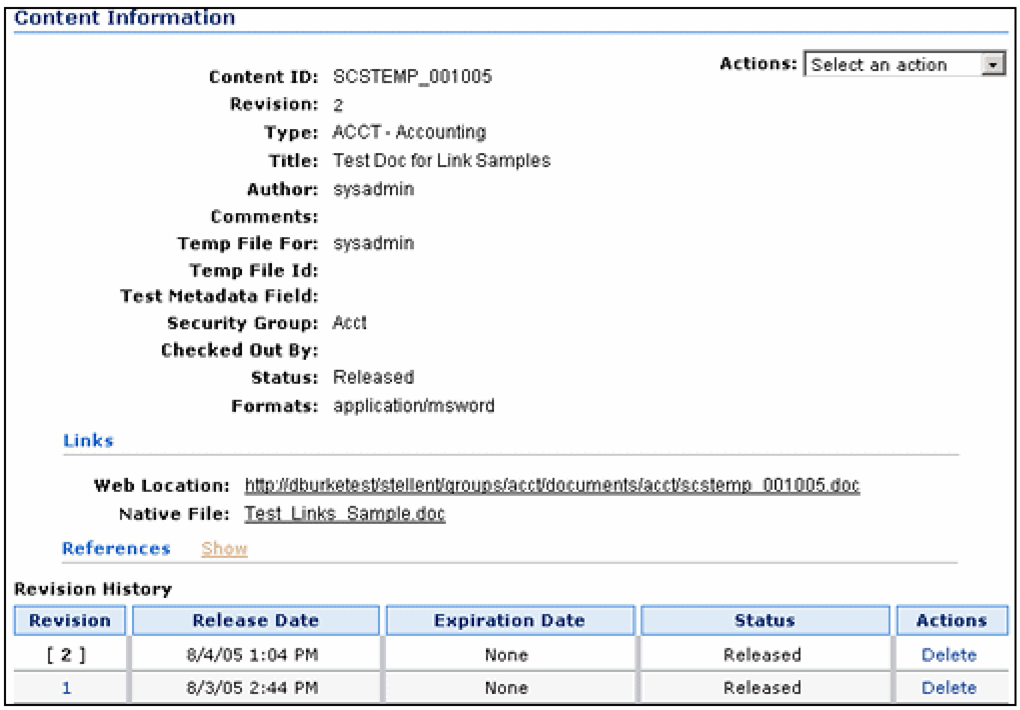
A.3.4 Link References on Content Information Page

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

You can use the Show or Hide References toggle switch to see if the content item references and/or is referenced by other content items.

A.3.4.1 Hide Link References

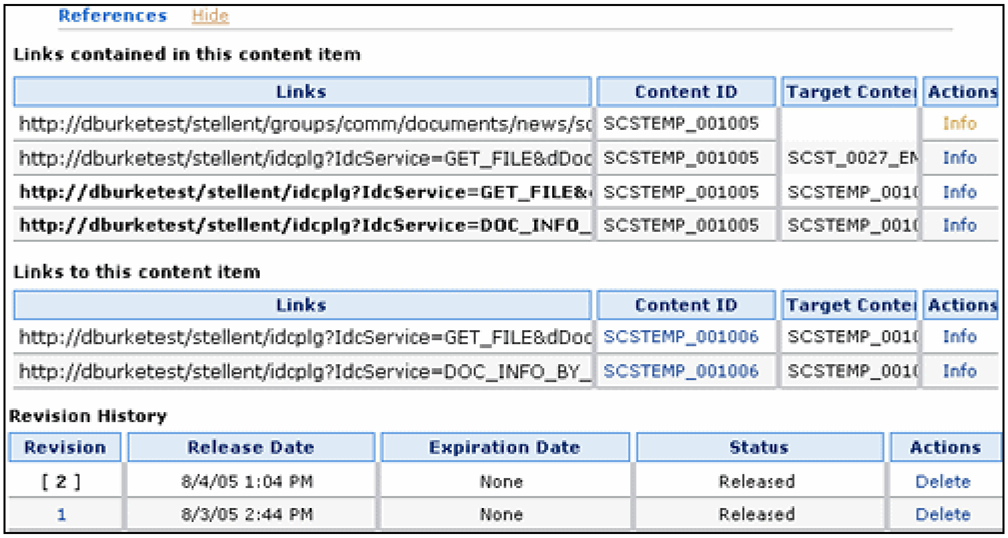
This is the default display option for the Content Information page when the content item has applicable links associated with it.



The References toggle switch is included on the page but the individual sections are not displayed. The Show toggle switch option is activated. Clicking **Show** opens the References sections that list all applicable links associated with the content item.

A.3.4.2 Show Link References

Clicking the **Show** toggle switch opens the References sections that list all applicable links associated with the content item.

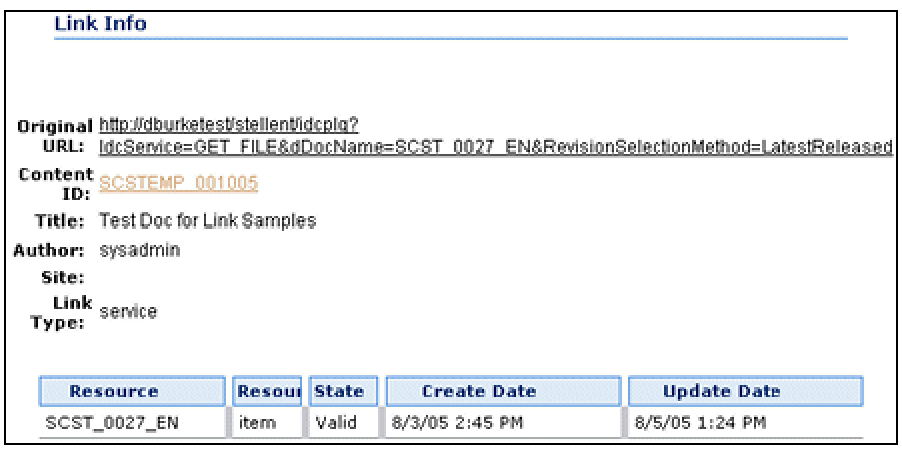


The Links contained in this content item section lists all the links contained in this content item that reference other documents. The Links to this content item section lists all the links in documents that reference this content item. Links that are invalid or broken are listed using bold font. Clicking the **Info** link in the Actions column displays the Link Info Page for that particular link.

When the References sections are open, the **Hide** toggle switch option is activated. Clicking **Hide** closes the References sections and hides the lists of links.

A.3.5 Link Info Page

The Link Info page provides additional information about a link. The Content ID field contains an active link to the content item that contains this link.



You can access this page from the Search Links Page or from the Content Information page.

A.4 Working With Files

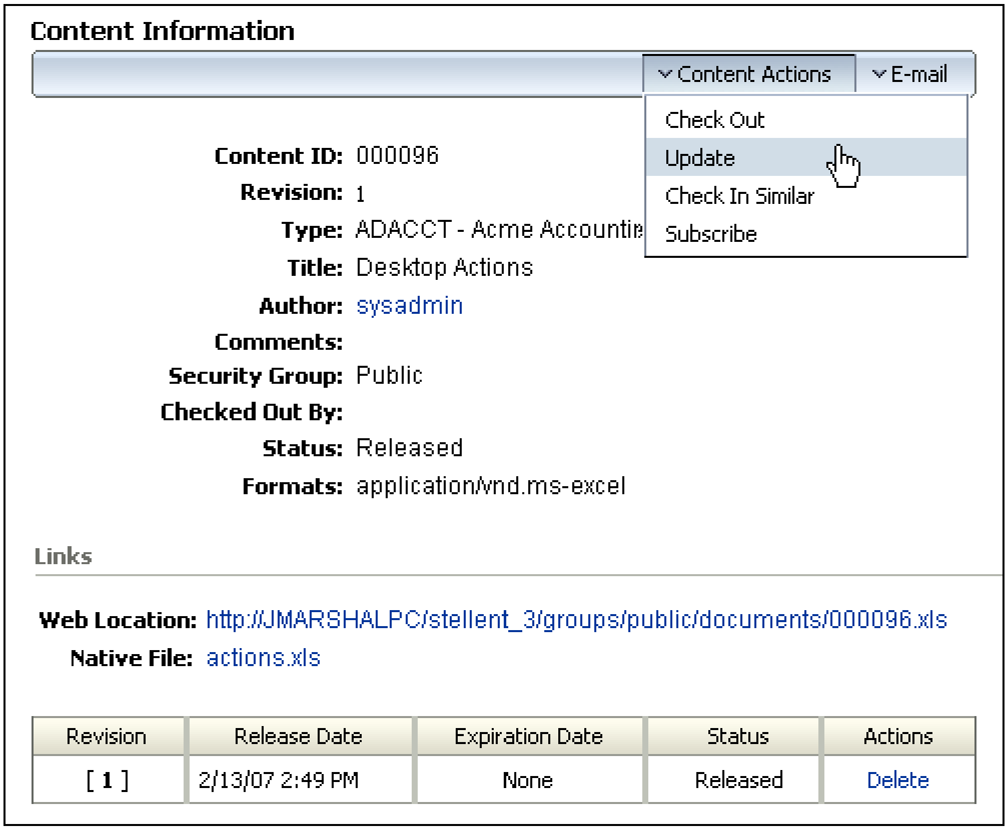
This section describes screens used when you are working with files.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topics:

A.4.1 Content Information Page

The content information page is used to view metadata and other information about a specific content item. You can access it from Search Results and Action Item Links.



For example, you can use this page to determine when a file was released or to see the content item's revision history.

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

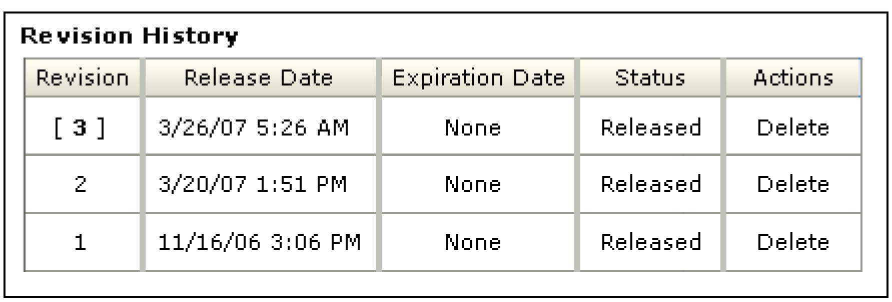
Element	Description
Full link	Displays the full content information page. This link is displayed only if a content item meets criteria defined by the system administrator in a content profile rule and if you have administrator privileges. If this link is displayed, more content information is available than is shown.
Content ID field	The unique identifier for the content item. If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Revision field	The revision number of this revision.
Type field	The category of the document.
Title field	The descriptive name for the content item.

Element	Description
Author link	The user who checked in this revision. Clicking the link opens your e-mail program with a new message addressed to this user.
Comments field	Additional notes about the content item.
Security Group field	An identifier that specifies access permission to the content item.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Checked Out By field	The user who has the content item checked out.
Status field	The revision status indicating where the file is in its life cycle.
Formats field	The file format of the native file.
Web Location link	The unique web address for the web-viewable file. Clicking the link displays the web-viewable file.
Native File link	The file name of the native file. Clicking the link enables you to open or save a copy of the native file.
Discussion	Allows for the addition of a post to an associated threaded discussion of a content item. Associated discussions are stored as content items in Content Server, and identified by appending a *_d* to the end of the content ID of the item to which the discussion is associated. For example, an item with content ID *001* would have an associated discussion with content ID *001_d*. If you have a content item that has a document name that is within 1 of the database storage maximum, which is 30 by default, you cannot create a threaded discussion for it. Ask your administrator to increase the length of the field. **Create Discussion**: Creates a new discussion item in Content Server, associated with the content item. **<content_id>_d (*x* item)**: Opens an existing discussion associated with the content item so that a new post may be added. The number of posts is listed next to the discussion ID in parenthesis. For example, *001_d (4 items)* means that four posts have been made in the discussion associated with content ID 001.

Element	Description
Action Menus	**Content Actions** Performs the selected action: **Check Out**: Checks out the content item and displays the Check-Out Confirmation Page. This option is displayed only if the content item is not checked out. **Undo Check Out**: Cancels the content item check-out. This option is displayed only if the content item is checked out. You can undo check-out only on content items you checked out, or you must have Admin permission for the content item. **Update**: Displays the Info Update Form, which enables you to change the content item's metadata. **Check In Similar**: Displays the Content Check-In Form with the current content item's metadata already filled in. **Subscribe**: Displays the Subscriptions Page, which enables you to be notified of new revisions to the content item. This button is displayed if you have not subscribed to the content item. **Unsubscribe**: Cancels your subscription to the content item. This option is displayed if you have subscribed to the content item and no criteria subscriptions are enabled on your system. **Subscriptions**: Displays the Subscriptions Page. This option is displayed if you have subscribed to the content item and criteria subscriptions are enabled on your system. **Check Out and Open**: Opens the item directly in a WebDAV-compliant native application from Content Server. This option is available only on the current revision, and only if the optional Check Out and Open component is installed and configured. **E-Mail:** Emails the content item to a recipient. **Send link by e-mail**: Opens your e-mail program with a new message that contains a link to the URL (web address) of the web-viewable file.
Revision History section	Shows the complete revision history of the content item.

A.4.2 Revision History

The Revision History section of the Content Information Page is used to view and delete revisions of a content item.



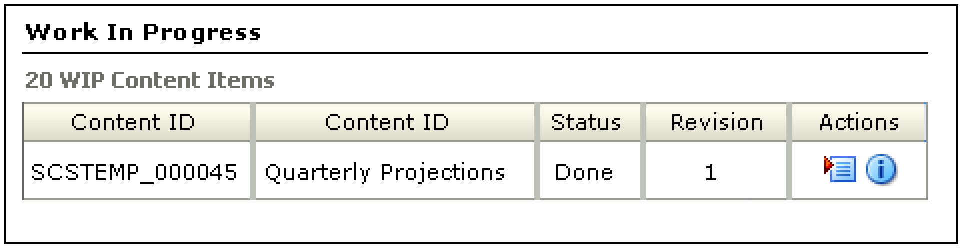
Revision History

Revision	Release Date	Expiration Date	Status	Actions
[3]	3/26/07 5:26 AM	None	Released	Delete
2	3/20/07 1:51 PM	None	Released	Delete
1	11/16/06 3:06 PM	None	Released	Delete

Element	Description
Revision column	Clicking a revision number displays the Content Information Page for that revision:
Release Date column	The date and time the revision was released.

Element	Description
Expiration Date column	The date and time the revision will no longer be available for searching or viewing in the content server, if any.
Status column	The revision status indicating where the file is in its life cycle.
Actions column	Clicking the Delete option removes the revision from the content server. You must have delete permission for the content item to delete a revision.

A.4.3 Work In Progress Page

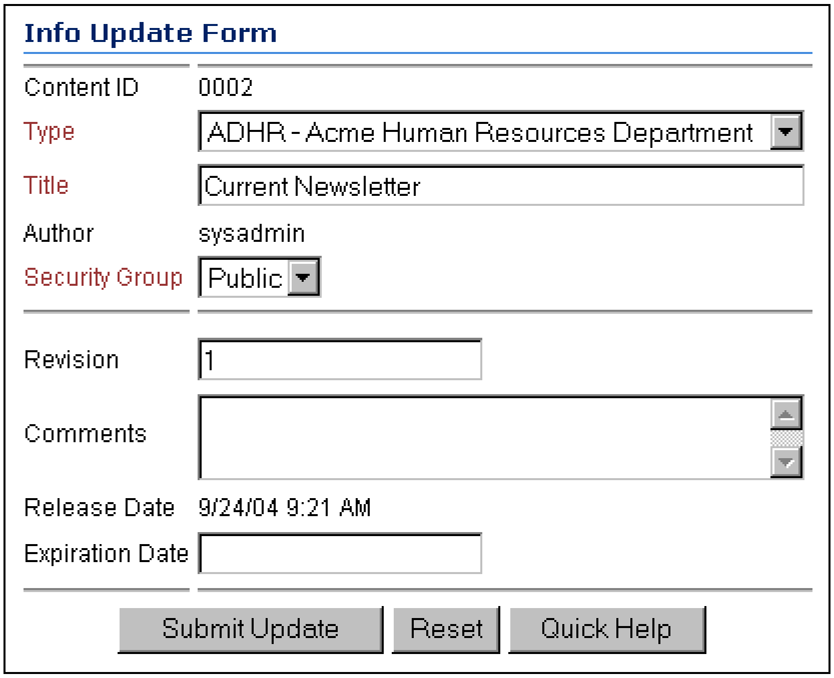


The Work In Progress page displays content items that are in the GenWWW or Done status. To access this page, click **Work In Progress** on the Content Management Tray.

Element	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item. Clicking the Content ID link displays the web-viewable file.
Status column	Displays the revision status of the content item.
Revision Column	Displays the revision number of the content item.
Action icon	Displays a contextual menu allowing you to check out the content item, or display the Content Information Page for the content item.
Info icon	Displays the Content Information Page for the content item.

A.4.4 Info Update Form

The Info Update Form is used to change a content item's metadata without creating a new revision.



To access this page, select **Update** from the Actions list on the Content Information Page for a content item.

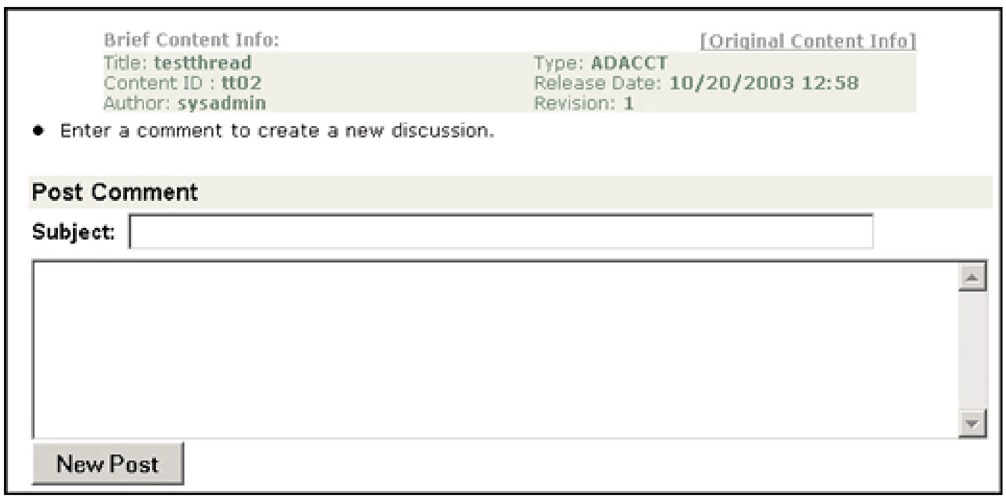
Element	Definition
Content ID field*	The unique identifier for the content item. This value cannot be changed. If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Type field*	The category of the file. You must select from a list of predefined values.
Title field*	A descriptive name identifying the revision. The maximum length is 80 characters.
Author field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.
Security Group field*	An identifier that specifies access permission to the content item. You can select from the list of predefined values.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Revision field	The revision number.
Comments field	Additional notes about the content item. The maximum length is 255 characters.
Release Date field	The date that the current revision was released to the content server. This value cannot be changed.

Element	Definition
Expiration Date field	The date and time that the revision will no longer be available for searching or viewing in the content server. ■ Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. ■ If a value is entered, the date is required; the time is optional.
Submit Update button	Saves the specified metadata.
Reset button	Resets all metadata fields to their original values.

* Required metadata fields

A.4.5 Post Comment Form

The Post Comment Form can be accessed from numerous popup menus and links if the ThreadedDiscussions component is enabled by your system administrator. Use this form to post a comment on a content item, or to post a reply on content that already has a discussion initiated.



A.4.5.1 Discussion Form Menu

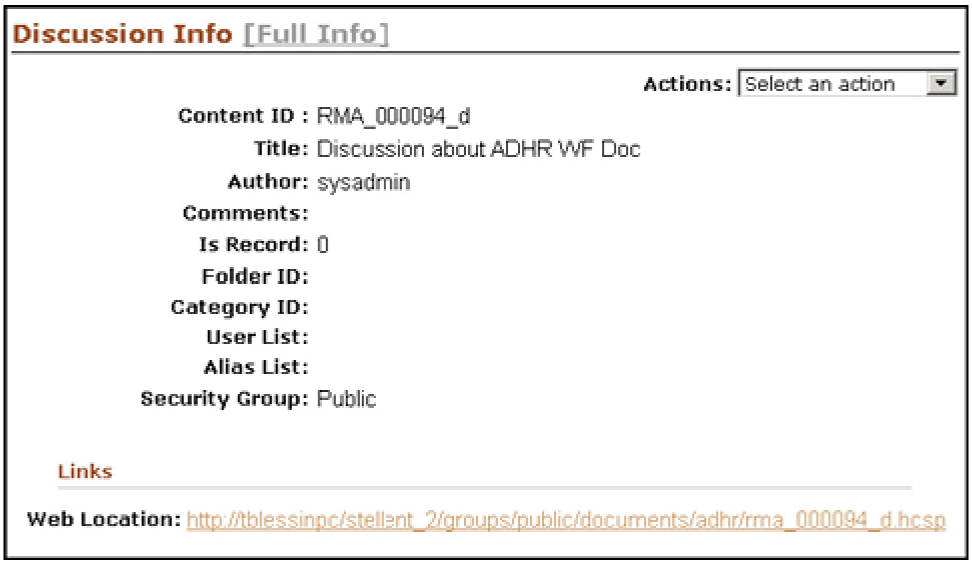
If the ThreadedDiscussions component is enabled by your system administrator, a new discussion form has the Original Content Info menu link only. After a discussion has been initiated, the Print View and Discussion Info menu links become available.

The following table describes the menu options.

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

A.4.6 Discussion Info Page

If the ThreadedDiscussions component is enabled by your system administrator, the Discussion Info Page is a brief summary page about a discussion.

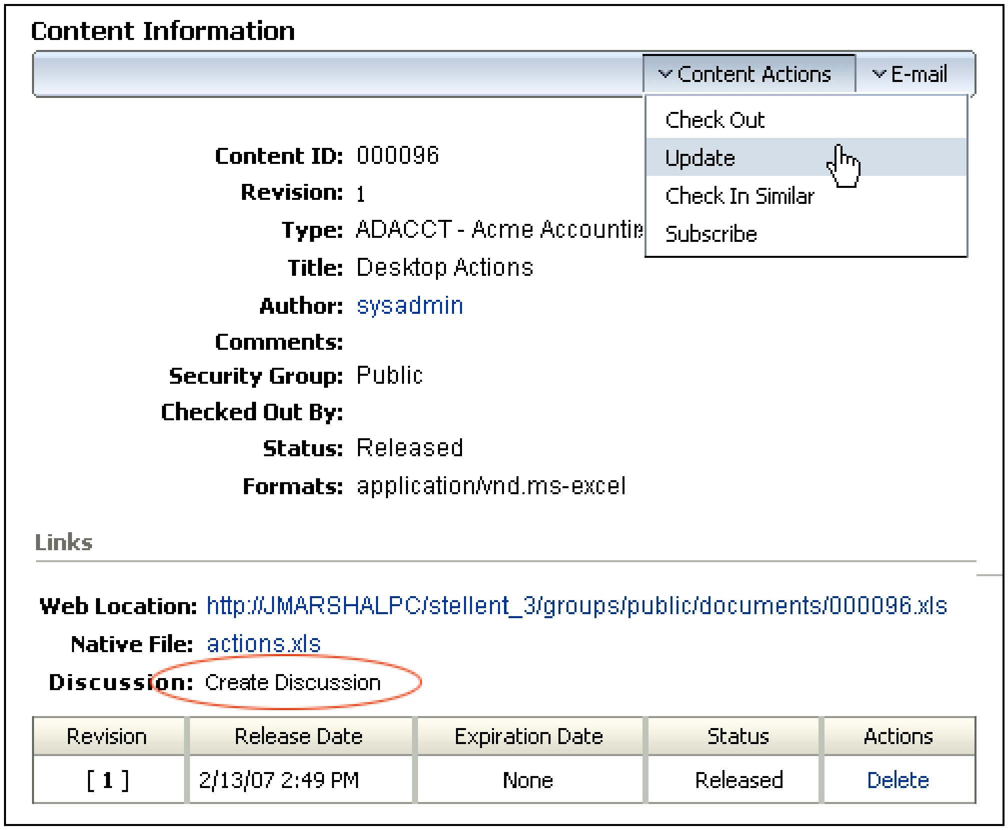


This page is only for content type that is a discussion, as denoted by the "_d" suffix. From this page, you can access the Content Information page by clicking the **[Full Info]** link.

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

A.4.7 Content Information Page with Discussion field

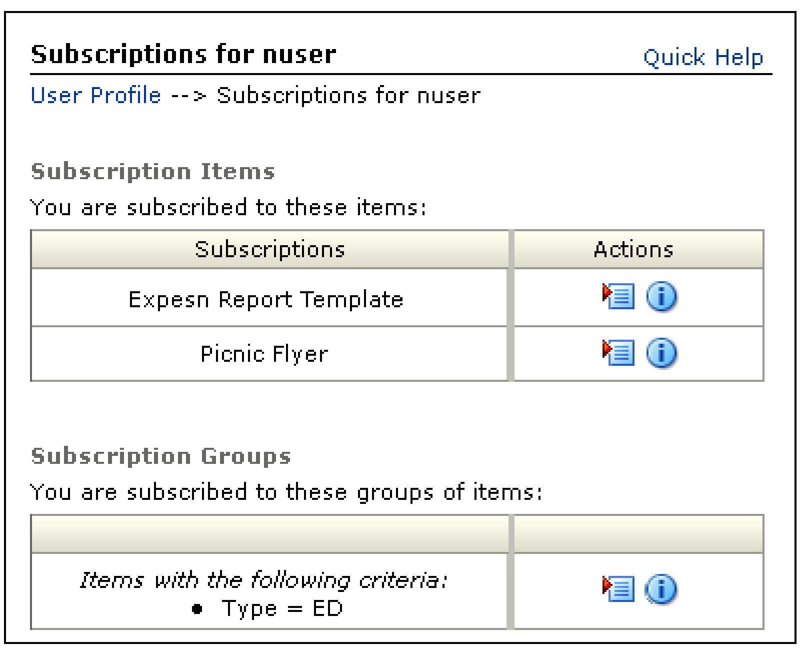
If the ThreadedDiscussions component is enabled by your system administrator, the Content Information Page contains the additional Discussion field when the ThreadedDiscussions component is installed and enabled.



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

A.4.8 Subscriptions Page

The Subscriptions page is used to view your current subscriptions.

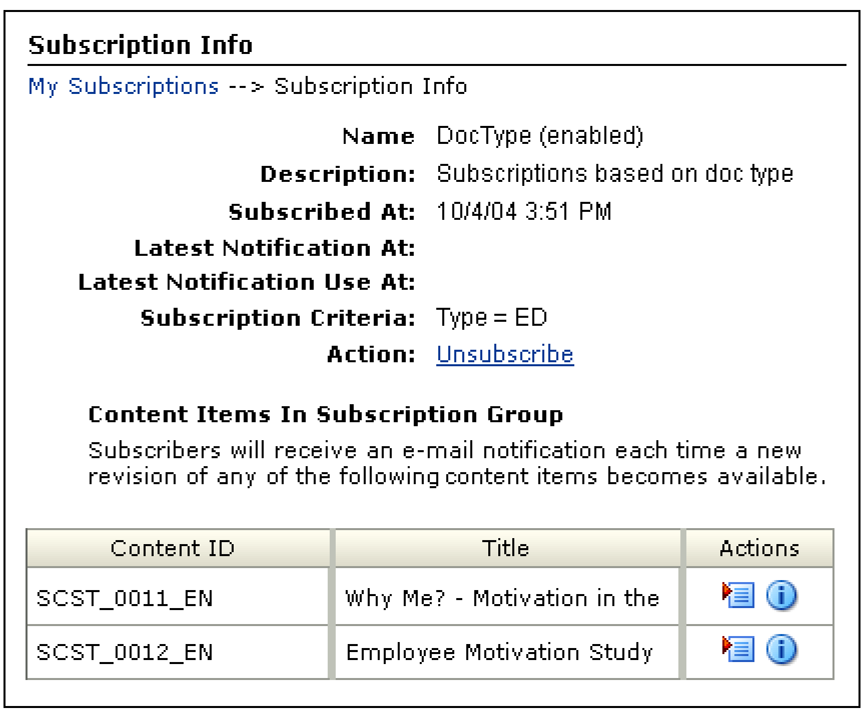


To access this page, click **My Subscriptions** under the My Content Server tray.

Field	Description
Locator Links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a link displays the page named by the link.
Subscriptions column	Displays the title of the content item. Clicking the title link displays the web-viewable file.
Subscription Actions	**Actions icon** ■ **Content Information link**: Displays the Content Information Page. ■ **Unsubscribe link**: Cancels your subscription to the content item. This link is displayed only if you are already subscribed. **Info icon**: Display the Content Information Page.
Subscriptions Groups column	Displays the subscription criteria for the content group.
Subscription Groups Actions	**Actions icon** ■ **Subscription Info link**: Displays the Subscription Info Page. ■ **Unsubscribe link**: Cancels your subscription to the subscription group. **Info icon**: Displays the Subscription Info Page.

A.4.9 Subscription Info Page

The Subscription Info page is used to identify when you were subscribed to a file or group of files and when you were last notified about a new revision.

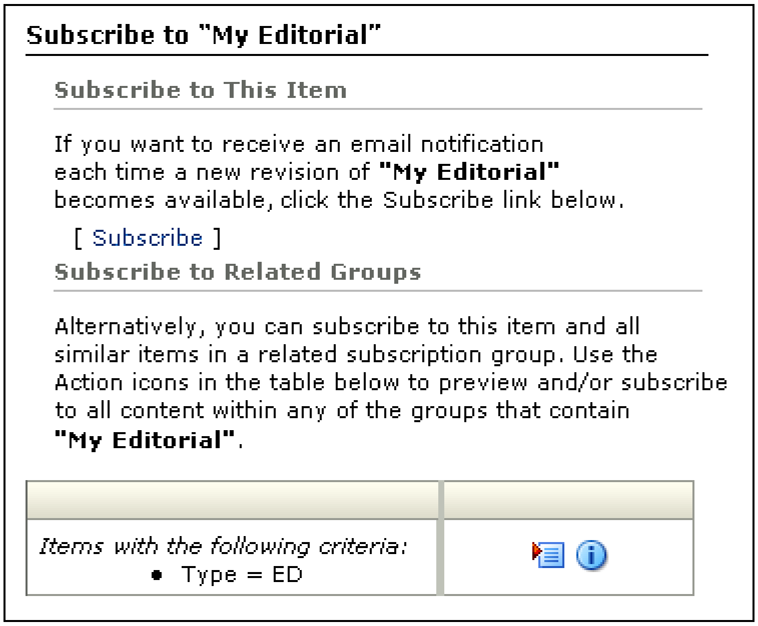


To access this page, select **Subscription Info** from the Content Actions menu on the Content Information Page.

Field	Description
Locator links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Clicking a link displays the page named by the link.
Name field	The name of the subscription.
Description field	The description assigned by the system administrator.
Subscribed At field	The date and time that you subscribed to the file or your system administrator subscribed you to the file.
Latest Notification At field	The most recent date and time that you were sent an e-mail notification from this subscription.
Latest Notification Use At field	The most recent date and time that you accessed a content item from an e-mail notification from this subscription.
Subscription Criteria	Shows the criteria for the subscription.
Action field	Clicking **Unsubscribe** cancels your subscription.
Content ID column	Shows the content IDs of the content items included in the subscription. Clicking a Content ID link displays the web-viewable file.
Title	Shows the titles of the content item included in the subscription.
Actions column	**Actions icon:** ▪ **Content Information**: Displays the Content Information Page. ▪ **Check In**: (Seen if content is checked out by user.) Displays the Content Check-In Form. ▪ **Check Out**: (Seen if content is not checked out.) Checks out the item and displays the Check-Out Confirmation Page. ▪ **Check In Similar**: Displays the Content Check-In Form with the metadata fields filled in with information similar to this item. ▪ **Send link by e-mail**: Opens a new e-mail with links to the content item's web-viewable and native files, as well as the Content Information Page. **Info icon**: Displays the Content Information Page.

A.4.10 Subscribe To "Item" Page

The Subscribe To "*item*" page is used to specify whether you want a file subscription or a criteria subscription.

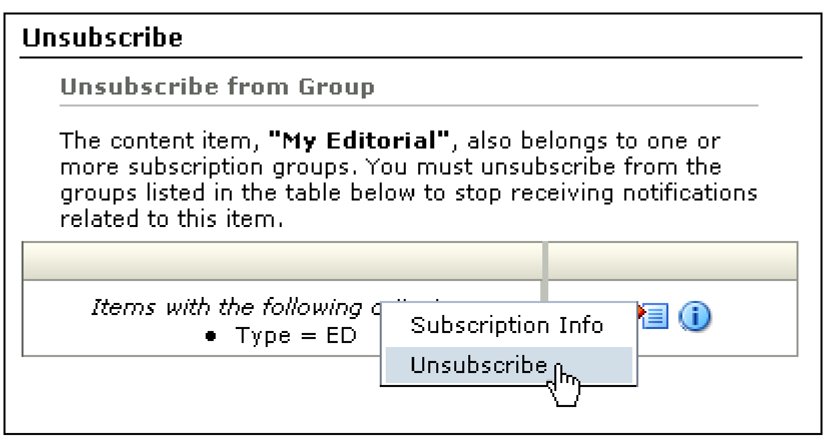


To access this page, select **Subscribe** from the Content Actions menu on the Content Information Page.

Element	Description
Subscribe link	Subscribes to the content item and not the group.
Subscriptions column	Lists the criteria of the group to which the item belongs.
Actions column	**Actions icon** ■ **Subscription Info**: Displays the Subscription Info Page. ■ **Subscribe**: Subscribes to the specified criteria group. **Info icon**: Displays the Subscription Info Page.

A.4.11 Unsubscribe Page

The Unsubscribe page is used to cancel the subscription to a content item or group.



To access this page, select **Unsubscribe** from the Content Actions menu on the Content Information Page.

Element	Description
Subscriptions column	Lists the criteria of the group to which the item belongs.
Actions column	**Actions icon** ■ **Subscription Info**: Displays the Subscription Info Page. ■ **Unsubscribe**: Unsubscribes from the specified criteria group. **Info icon**: Displays the Subscription Info Page.

A.5 Checkin and Checkout Interface

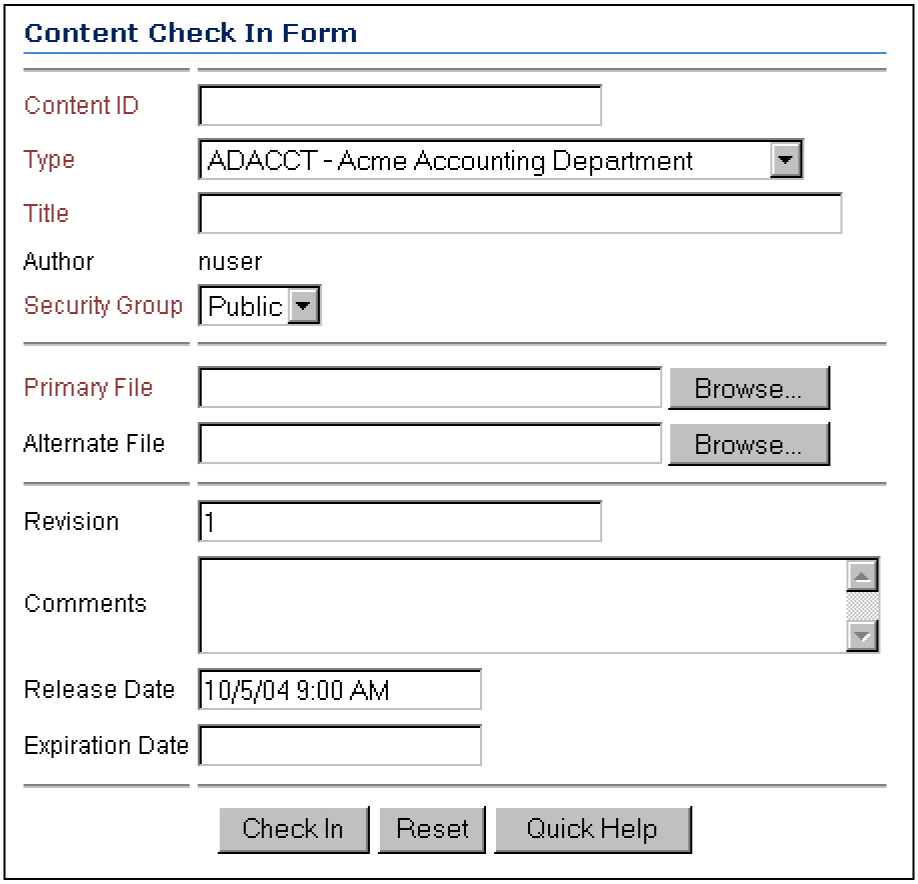
This section describes the screens used when you check content in and out of the Content Server.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topics:

A.5.1 Content Check-In Form

The content check-in form is used by contributors to check files into Content Server.



To access this page, click **New Check In** on the top menu.

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

Element	Definition
Content ID field[1]	The unique identifier for the content item. ■ Duplicate names are not allowed. ■ Maximum length is 30 characters. ■ The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ | If a content ID is already filled in or if this field is not displayed, the system is set up to generate content IDs automatically. If your content server uses an Oracle database, all content IDs are automatically converted to uppercase letters.
Type field	The category of the file. You must select from a list of predefined values.
Title field	A descriptive name identifying the revision. Maximum length is 80 characters.

Element	Definition
Author field	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.
Security Group field	The security group is a set of files with the same access permission.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Primary File field	The path and file name of the native file being checked in. ■ Maximum length is 80 characters. ■ The maximum file extension length (after the period) is eight characters. ■ Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected**: Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the primary file. **Clear**: Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your User Profile page.
Format field	The application format for the file name entered in the Primary File field. ■ This field appears only if it has been enabled by the system administrator. ■ If the **use default** option is selected, Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. ■ If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
Alternate File field	The path and file name of an alternate, web-viewable file or a file that can be converted to web-viewable format. ■ The file extension (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*). ■ Maximum length is 80 characters. ■ The maximum file extension length (after the period) is eight characters. ■ Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected**: Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the alternate file. **Clear**: Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your User Profile page.

Element	Definition
Format field	The application format for the file name entered in the Alternate File field. ■ This field appears only if it has been enabled by the system administrator. ■ If the **use default** option is selected, Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. ■ If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
Revision field	The revision increments automatically with each check-in of the content item, so generally, you should not change this value.
Comments field	Additional notes about the file. ■ Maximum length is 255 characters.
Release Date field	The date and time that the revision is available for viewing in Content Server. ■ Defaults to the date and time the file is checked in. ■ If another date is entered, the revision remains in Done status until the specified date. For details refer to "Revision Status" on page 5-3. ■ The date is required; the time is optional.
Expiration Date field	The date and time that the content item will no longer be available for viewing in the content server. ■ Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. ■ If a value is entered, the date is required; the time is optional. By default, all revisions of the content item will expire when the current revision expires.
Custom fields	Any custom metadata fields for your system will be displayed on this page.

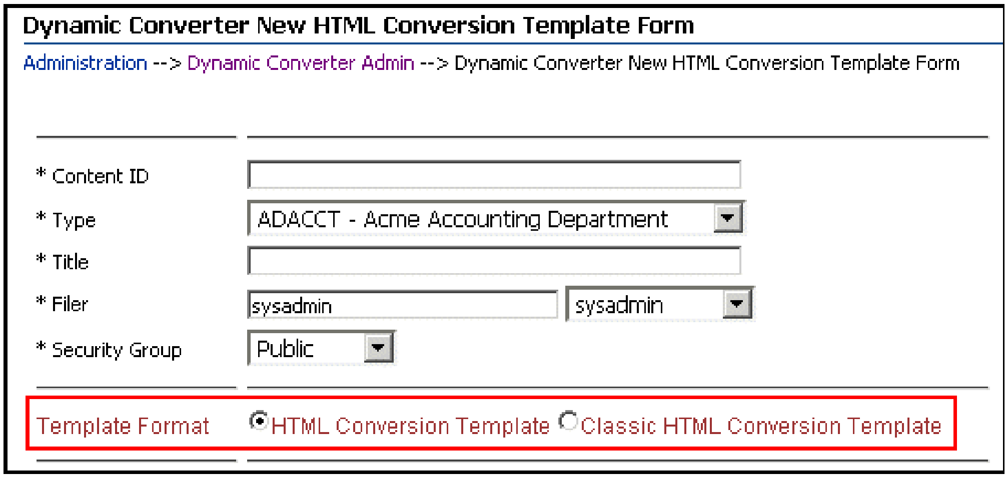
[1] Required metadata fields.

A.5.2 Dynamic Converter Check-In Fields

When the Dynamic Converter option is enabled, there are additional metadata fields that are displayed for new and existing content items. For more detailed information about the Dynamic Converter product, refer to the applicable administration and template editor guides.

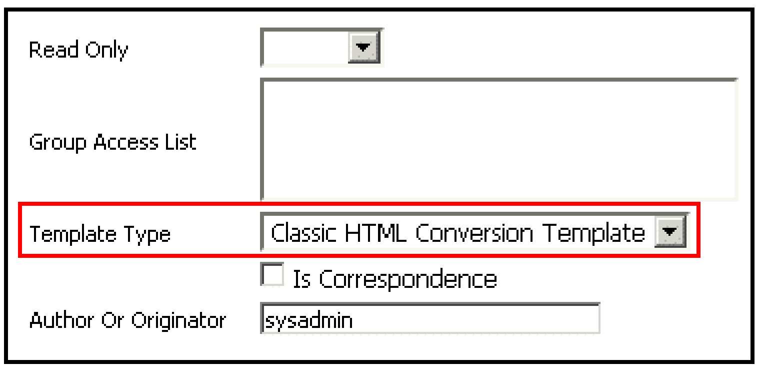
When you check in a new form, the Template Format metadata field is included on the Content Check-In Form. The available options are:

- **Classic HTML Conversion Template:** the template editor from the earlier version of Dynamic Converter.
- **HTML Conversion Template:** the current template editor.



When you check in an existing template, the Template Type field is included. The available options are:

- Classic HTML Conversion Template
- Classic HTML Conversion Layout
- Script Template



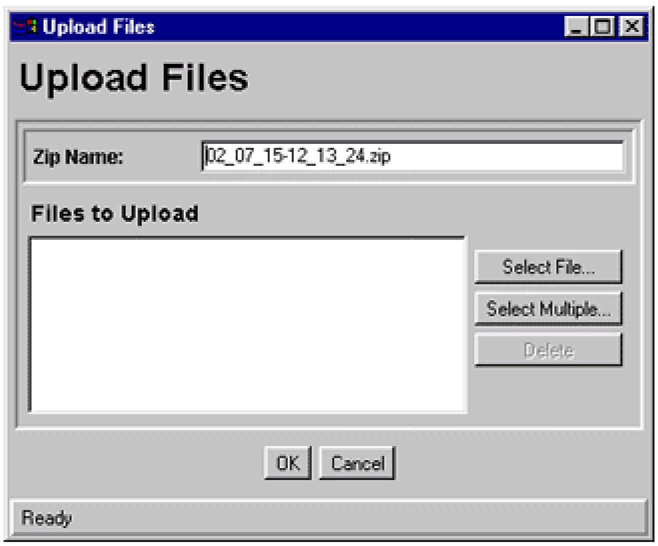
A.5.3 Check-In Confirmation Page

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

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

A.5.4 Upload Files Window

The Upload Files window is used to create a zip file as the primary or alternate file that will be checked in to the content server.

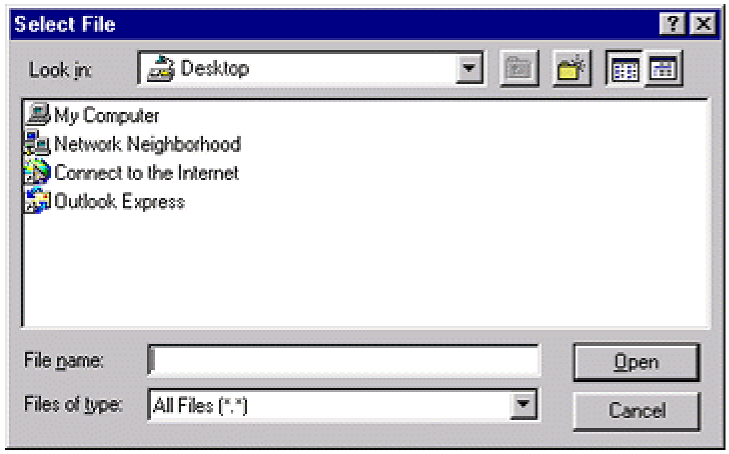


To access this window, select an **Upload Multiple Files** check box on the Content Check-In Form, and click the corresponding **Browse** button.

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

A.5.5 Select File Window

The Select File window is used to select individual files to be included in the uploaded Zip file.

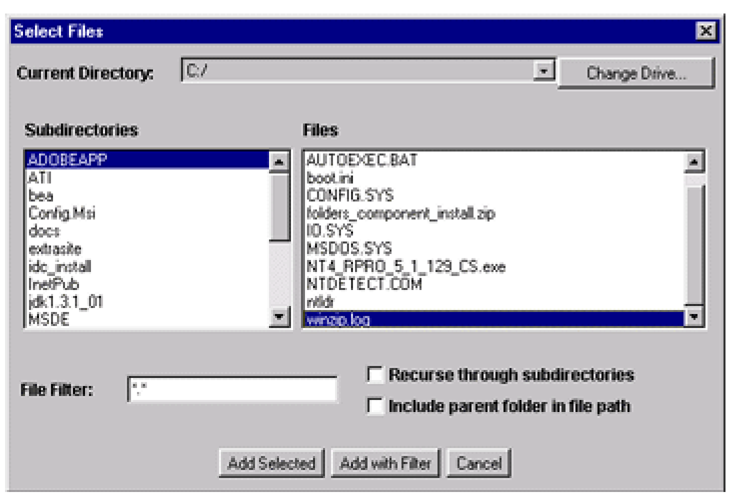


To access this window, click **Select File** in the Upload Files Window.

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

A.5.6 Select Files Window

The Select Files window is used to select multiple files from the same directory to be included in the uploaded zip file.



To access this window, click **Select Multiple** in the Upload Files Window.

Element	Description
Current Directory field	Shows the directory currently selected.
Change Drive button	Displays the Change Drive Window.
Subdirectories list	Select the subdirectory where the files are located. Double-click the ".." entry in this list to navigate to the parent directory.
Files list	Select specific files to be included in the zip file. ■ Holding down the Ctrl key and clicking on files selects non-contiguous files. ■ Holding down the Shift key and clicking two files selects contiguous files.
File Filter field	All files that meet the criteria in this field will be selected when the Add with Filter button is clicked. ■ You can use the asterisk * (zero or more characters) and question mark ? (one character) as wildcards. ■ This field has no effect when the Add Selected button is clicked.
Recurse through subdirectories check box	Selects all files in all subdirectories of the current directory when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Include parent folder in file path check box	Store path information from the parent folder with the files you are adding when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Add Selected button	Places the selected files in the Files to Upload list in the Upload Files Window.
Add with Filter button	Places files in the Files to Upload list in the Upload Files Window, based on the *File Filter* field, *Recurse through subdirectories* check box, and *Include parent folder in file path* check box.
Cancel button	Closes the Select Files window without selecting any files.

A.5.7 Change Drive Window

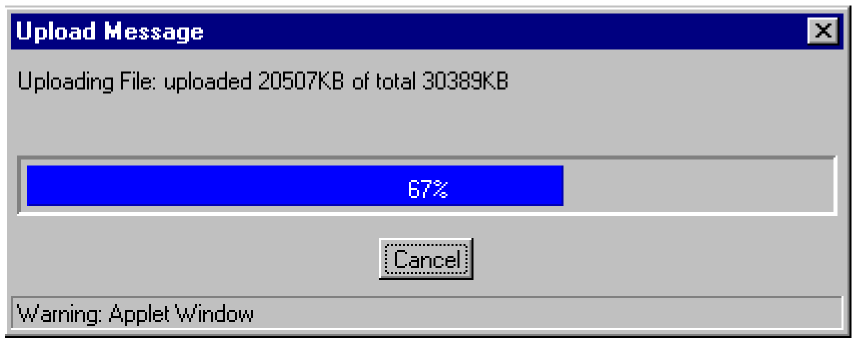
The Change Drive window is used to change the drive where files to be included in the uploaded zip file are located.

To access this window, click **Change Drive** in the Select Files Window.

Element	Description
Drive list	Select the drive where the files to be selected are located.
OK button	Changes the drive displayed in the Current Directory field in the Select Files Window.
Cancel button	Closes the Change Drive window without changing the drive.

A.5.8 Upload Message Screen

The Upload Message screen shows the upload progress when the chunking function is enabled.



If the chunking function is not enabled on your system, this screen will not appear.

A.5.9 Checked-Out Content for [User] Page

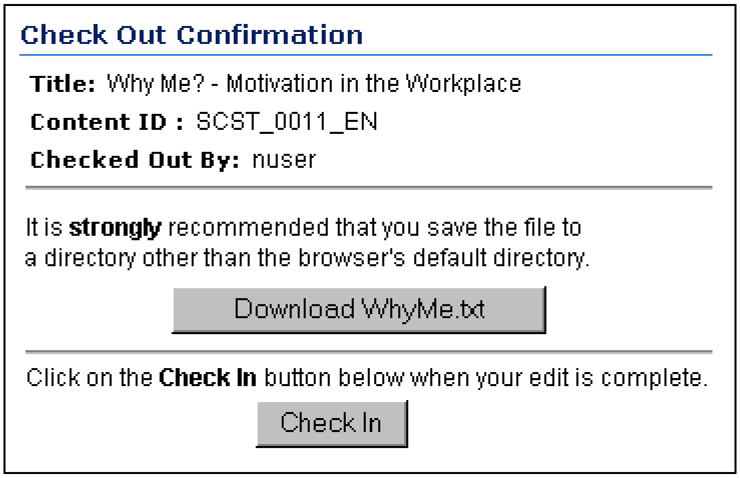
The Checked Out Content for *[User]* page is used to identify which files are checked out by the current user.

To access this page, click **My Checked-Out Content** under the My Content Server tray.

Element	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.
Action icon	Displays a contextual menu allowing you to display the Content Information Page, check in the content item, or undo the check-out of the content item, depending on your access rights.
Info icon	Displays the Content Information Page for the content item.

A.5.10 Check-Out Confirmation Page

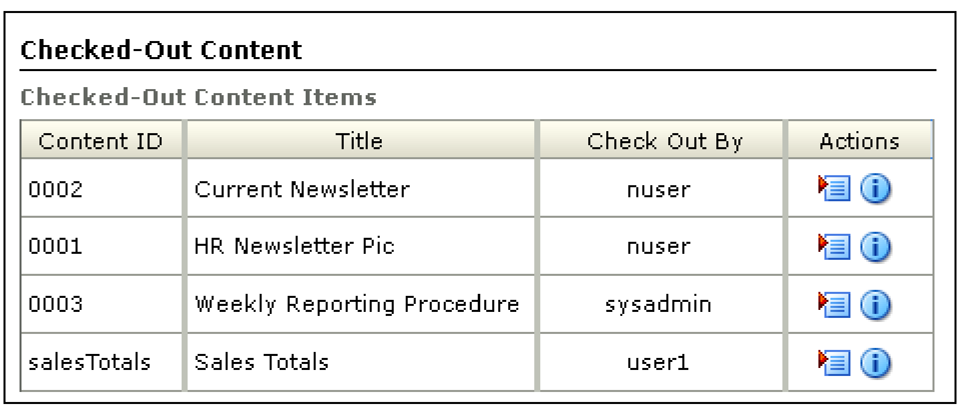
The Check-Out Confirmation page is displayed after you have checked out a single content item successfully.



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

A.5.11 Checked-Out Content Page

The checked-out content page is used to identify which files are checked out.



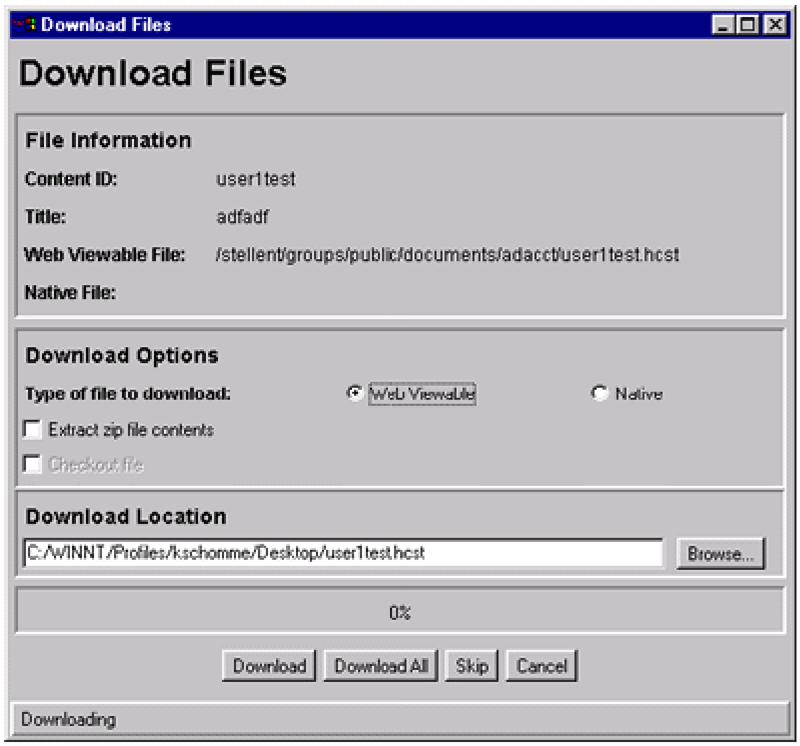
To access this page, click **Checked Out Content** on the Content Management Tray.

Element	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.

Element	Description
Action icon	Displays a contextual menu allowing you to display the Content Information Page, check in the content item, or undo the check-out of the content item, depending on your access rights.
Info icon	Displays the Content Information Page for the content item.

A.5.12 Download Files Screen

The Download Files screen is used to specify download options and the target directories for files being downloaded from the content server.



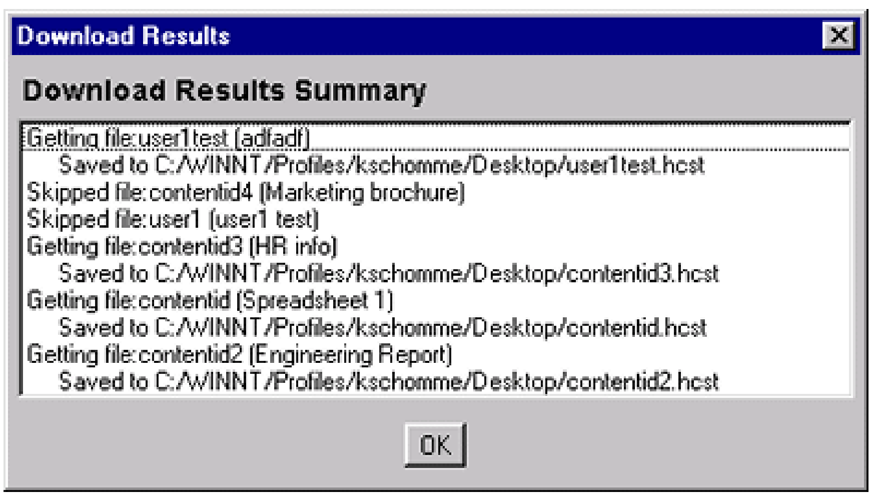
To access this screen, click **Download** on the Search Results Page.

Element	Description
Content ID field	The content ID of the file.
Title field	The descriptive title of the content item.
Web Viewable field	The path and file name of the content item's web-viewable file.
Native field	The file name of the content item's native file. This field is filled in when the Native option is selected.
Type of file to download options	**Web Viewable**: Specifies that the web-viewable file is to be downloaded. **Native**: Specifies that the native file is to be downloaded.
Extract zip file contents check box	**Selected**: Files in zip format will be uncompressed when they are downloaded. **Clear**: Files in zip format will be downloaded as is.

Element	Description
Check out file check box	**Selected**: Content items will be checked out as well as downloaded. **Clear**: Content items will only be downloaded and will not be checked out. This check box is available only when the Native option is selected.
Download Location field	The directory and file name where the current file will be copied. Click the Browse button to navigate to and select the directory.
Progress bar	Shows the progress of the download as a percentage.
Download button	Downloads the current file to the specified directory.
Download All button	Downloads all files that have not been skipped to the specified directory. This button is not displayed if only one file was selected on the search results page.
Skip button	Excludes the current file from the download. This button is not displayed if only one file was selected on the search results page.
Cancel button	Closes the Download Files screen.

A.5.13 Download Results Summary

The download results summary displays a log of the downloaded files.



This screen is displayed when the download process is complete.

A.6 Workflow Interface

This section describes the screens used when processing workflows.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topics:

A.6.1 Workflow Started Notification

A workflow started notification message is e-mailed to you when you are assigned to check in a new file for a basic workflow.

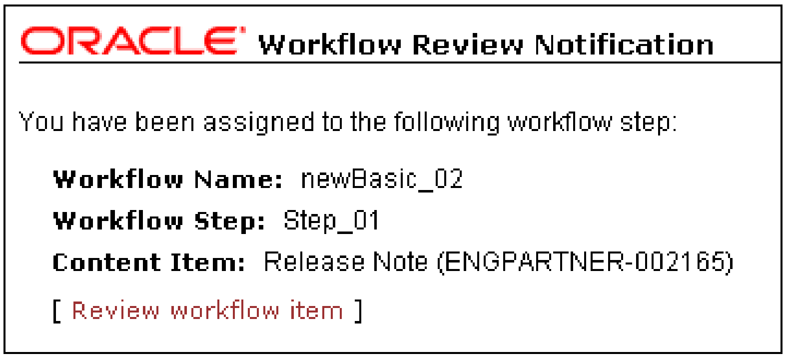
This is an automated message that you can use to identify the file that you need to check in and other workflow information.

Element	Description
Workflow Name field	Identifies the workflow.
Started By field	Opens an e-mail to the person who initiated the workflow.

Element	Description
Message field	Displays a message from the person who initiated the workflow.
Review workflow content link	Opens the Workflow Content Items Page.

A.6.2 Workflow Review Notification Message

A workflow review notification message is e-mailed to you when you are assigned to review a revision in a workflow.

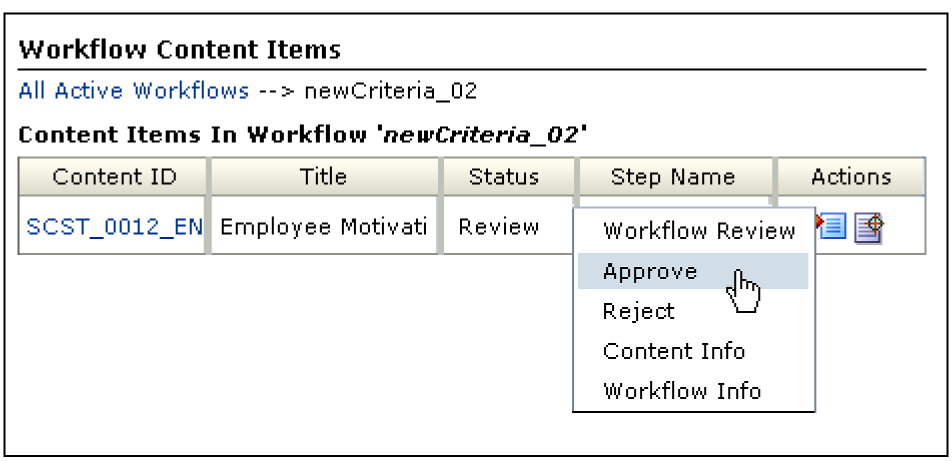


It is an automated message that you can use to identify some workflow characteristics.

Element	Description
Workflow Name field	Identifies the workflow.
Workflow Step field	Identifies the current step in the workflow.
Content Item field	Identifies the content item or items in the workflow.
Review workflow item link	Opens the Workflow Review Page.

A.6.3 Workflow Content Items Page

The Workflow Content Items page is used to identify which action to perform in the workflow.



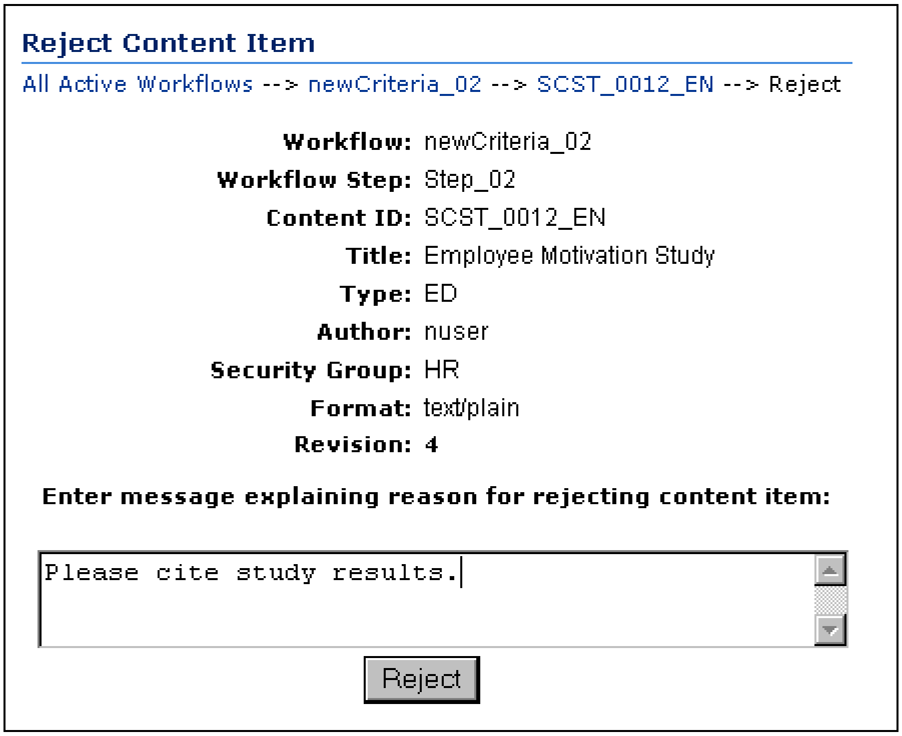
To access this page, click the **Review Workflow Content** link on a Workflow Started Notification or open the Content Management Tray, click **Active Workflows**, and then the workflow name on the Active Workflows Page.

Element	Description
Locator links	Displays a hierarchical navigation within content server. Located just below the page title.
Content ID column	Click the content ID to display the web-viewable file.
Title	The title of the content.
Status column	The status of the revision.
Step Name column	The name of the current workflow step.
Action icon	Displays the actions (if any) that you can take on the content item: **Workflow Review**: Displays the Workflow Review Page. **Approve**: Approves the revision. **Reject**: Rejects the revision and displays the Reject Content Item Page. **Content Info**: Displays the Content Information Page for the revision. **Workflow Info**: Displays the Workflow Info For Item Page for the revision.
Info icon	Displays the Workflow Review Page for the content item.

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

A.6.4 Reject Content Item Page

The Reject Content Item page is used to explain why you are rejecting a workflow revision.

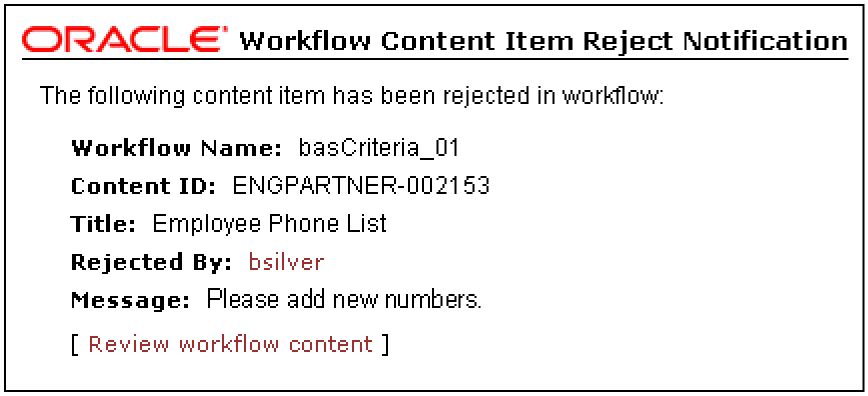


This page is displayed automatically when you reject a workflow item.

Element	Description
Locator links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Workflow field	The name of the current workflow.
Workflow Step field	The name of the current workflow step.
Content ID field	The content ID of the content item.
Title field	The title of the revision.
Type field	The value associated with the Type metadata field.
Author field	The login associated with the user who checked in the file.
Security Group field	The security group associated with the content item.
Format field	The formats corresponding to the file.
Revision field	The current revision of the content item.
Message field	Enables you to enter an explanation for why you are rejecting the revision. Include what should be done to ensure that the revision is approved in the future.
Reject button	Sends a Workflow Content Item Reject Notification to the previous contributor in the workflow.

A.6.5 Workflow Content Item Reject Notification

When a revision is rejected and the Reject Content Item Page is filled out, this e-mail message is automatically sent to users assigned to the previous contribution step in the workflow.

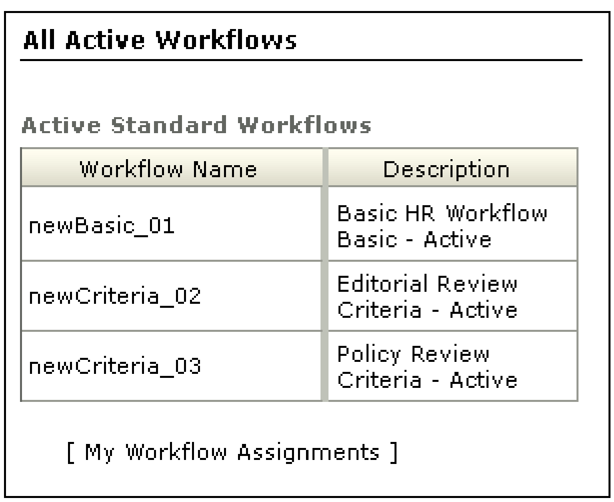


The workflow content item reject notification message identifies who rejected the revision and why it was rejected.

Element	Description
Workflow Name field	The name of the workflow.
Content ID field	The content ID of the rejected item.
Title field	The title of the rejected item.
Rejected By field	The user name of the person rejecting the item. Click to send an e-mail to the person.
Message field	The message sent by the person rejecting the item.
Review workflow content link	Opens the Workflow Content Items Page.

A.6.6 Active Workflows Page

The Active Workflows page is used to view a list of all active workflows in the system.



To access this page, click **Active Workflows** on the Content Management Tray.

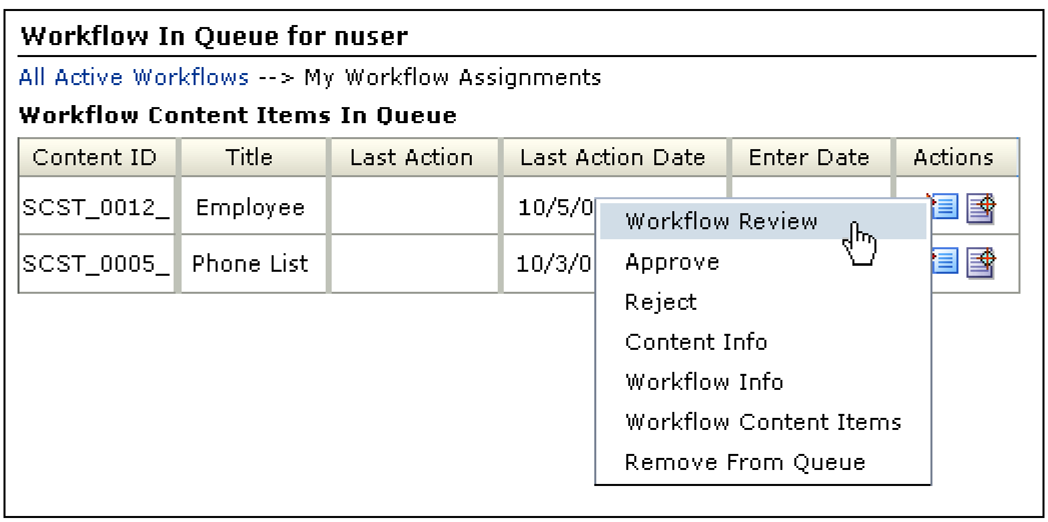
Element	Description
Workflow Name column	The names of the active workflows in the corresponding security group. Clicking a link opens the Workflow Content Items Page.

Element	Description
Description	A description of the workflow
My Workflow Assignments link	Displays the Workflow in Queue Page.

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

A.6.7 Workflow in Queue Page

To access this page, click **My Workflow Assignments** under the My Content Server tray.



The Workflow in Queue page is used to view a list of all content items that you need to review.

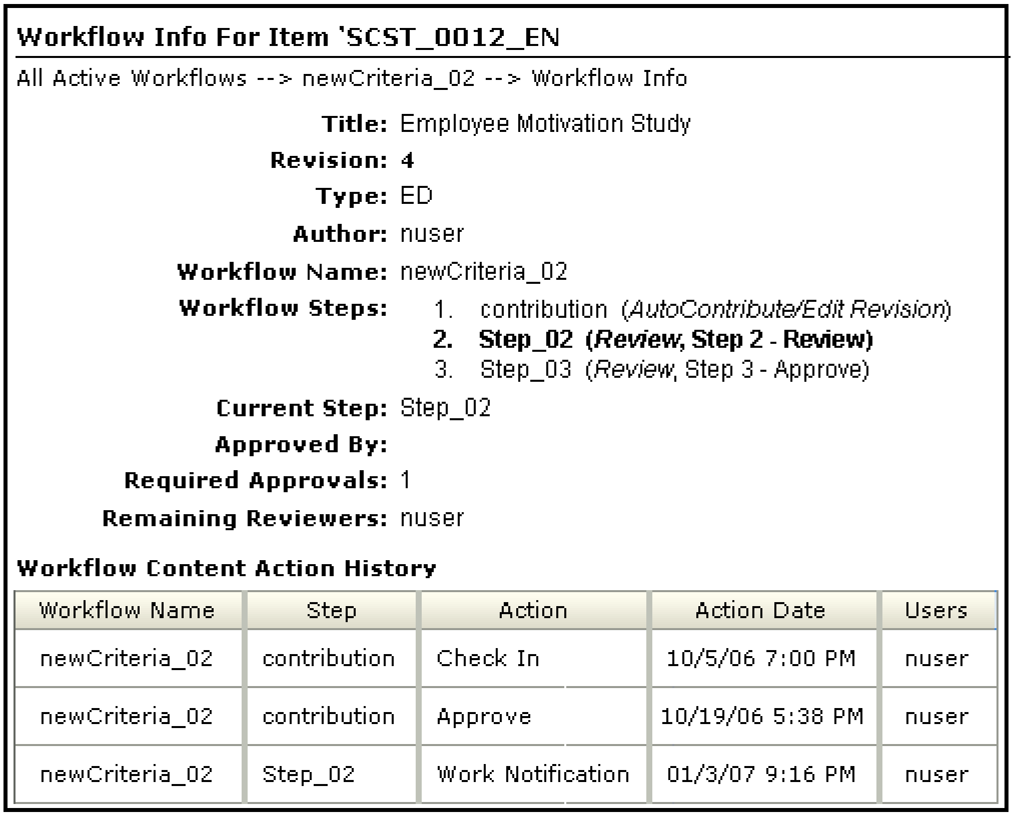
Element	Description
Locator links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Content ID column	Displays the content ID and the title of each workflow item. Clicking the content ID link displays the web-viewable file.
Title	The title of the workflow.
Enter Date column	The date and time that the content item entered the current step.

Element	Description
Action icon	Displays the actions (if any) that you can take on the content item: **Workflow Review**: Displays the Workflow Review Page. **Approve**: Approves the revision. **Reject**: Rejects the revision and displays the Reject Content Item Page. **Content Info**: Displays the Content Information Page for the revision. **Workflow Info**: Displays the Workflow Info For Item Page for the revision. **Workflow Content Items**: Displays the Workflow Content Items Page for the revision. **Remove from Queue**: Removes the content item from the Workflow in Queue page. (The content item is not deleted from the workflow.)
Info icon	Displays the Workflow Review Page.

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

A.6.8 Workflow Info For Item Page

The Workflow Info page is used to identify where a revision is in the current workflow and to view the workflow history.



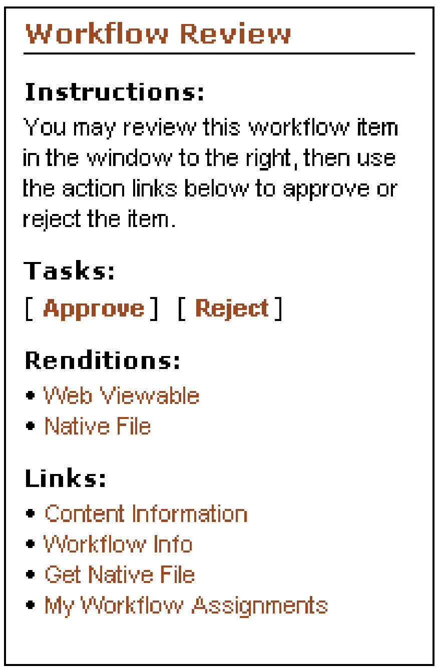
To access this page, select **Workflow Info** from the contextual menu under the Actions column on the Workflow Content Items Page or the Workflow in Queue Page, or by clicking **Workflow Info** on the Workflow Review Page.

Element	Description
Locator links	Displays a hierarchical navigation structure within the content server. Located just below the page heading.
Title field	The title of the content item.
Revision field	The current revision of the content item.
Type field	The value associated with the Type metadata field.
Author field	The login associated with the user who checked in the file.
Locator links	Displays a hierarchical navigation structure within the content server. Located just below the page title.
Workflow Name field	The name of the current workflow.
Workflow Steps field	Lists all of the workflow steps. The current workflow step is in boldface type. The type of workflow step is shown in parentheses.
Current Step field	The current workflow step.
Approved by field	Lists the logins of the users who have approved the revision at the current workflow step.
Required Approvals field	Shows how many approvals are required at the current workflow step.
Remaining Reviewers field	Lists the users who have yet to review the revision for the current step.

Element	Description
Current Step's Additional Exit Condition field	Lists additional conditions beyond required approvals that must be met for the workflow step to be completed.
Workflow Content Action History field	Lists the actions that have been performed on the revision during the current workflow process.
Workflow Name column	The name of the workflow or sub-workflow.
Step column	The name of the workflow step.
Action column	The action that was performed on the revision.
Action Date column	The date and time that the action was performed.
Users column	The users that performed the action.

A.6.9 Workflow Review Page

The Workflow Review page offers several options for viewing and taking action on content in a workflow to which you have a responsibility.



To access this page, click **Review Workflow Item** on the Workflow Review Notification Message or by selecting **Workflow Review** from the contextual menus under the Actions column on the Workflow Content Items Page or the Workflow in Queue Page.

Element	Description
Instructions field	Displays instructions on how to proceed with the workflow.
Tasks links	Links to specific tasks you can perform in the workflow. **Approve**: Approves the revision. **Reject**: Rejects the revision and displays the Reject Content Item Page. **Check Out**: Checks out a file and displays the Check-In Confirmation Page. This link is displayed only if the current step is a reviewer/contributor step.
Renditions	Links to specific tasks you can perform in the workflow. **Web Viewable**: Opens a version of the item in a format viewable in your browser, provided your system administrator has configured the content server to convert the item. **Native File**: Opens the item in your browser using the native application.
Links	Links to information relating to the item or workflow. **Content Info**: Displays the Content Information Page for the revision. **Workflow Info**: Displays the Workflow Info For Item Page for the revision. **Get Native File**: Prompts for you to open the item in its native application, or save a copy of the item in its native format. **My Workflow Assignments**: Displays the Workflow in Queue Page.

A.7 Folders Interface

This section describes the Folders interface screens.

> **Note:** If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topics:

- "Hierarchical Folder Information Page" on page A-62
- "Hierarchy Folder Configuration Page" on page A-64

A.7.1 Contribution Folders Link

When the Folders component is enabled, a new **Contribution Folders** link appears in the Browse Content tray.

Clicking this link displays the top-level Exploring Contribution Folders.

Expanding this link by clicking its plus symbol displays links to the Exploring Contribution Folders for the top-level folders in the hierarchy.

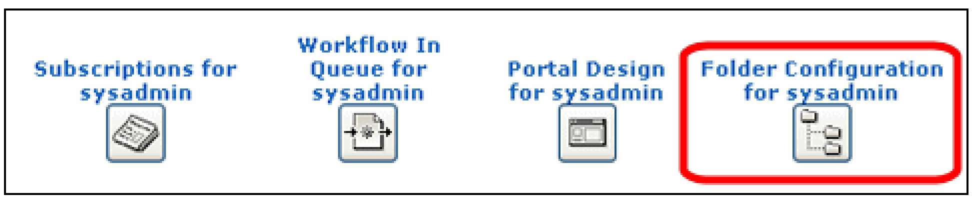
A.7.2 Folder Configuration Link

When the Folders component is enabled in Content Server, a **Folder Configuration for *[User]*** link appears in the My Content Server tray. Clicking this link displays the Folder Configuration Page.

Expanding this link by clicking its plus symbol displays links to the Default Information Field Configuration Page and Revision Information Field Configuration Page.

A.7.3 User Profile Page

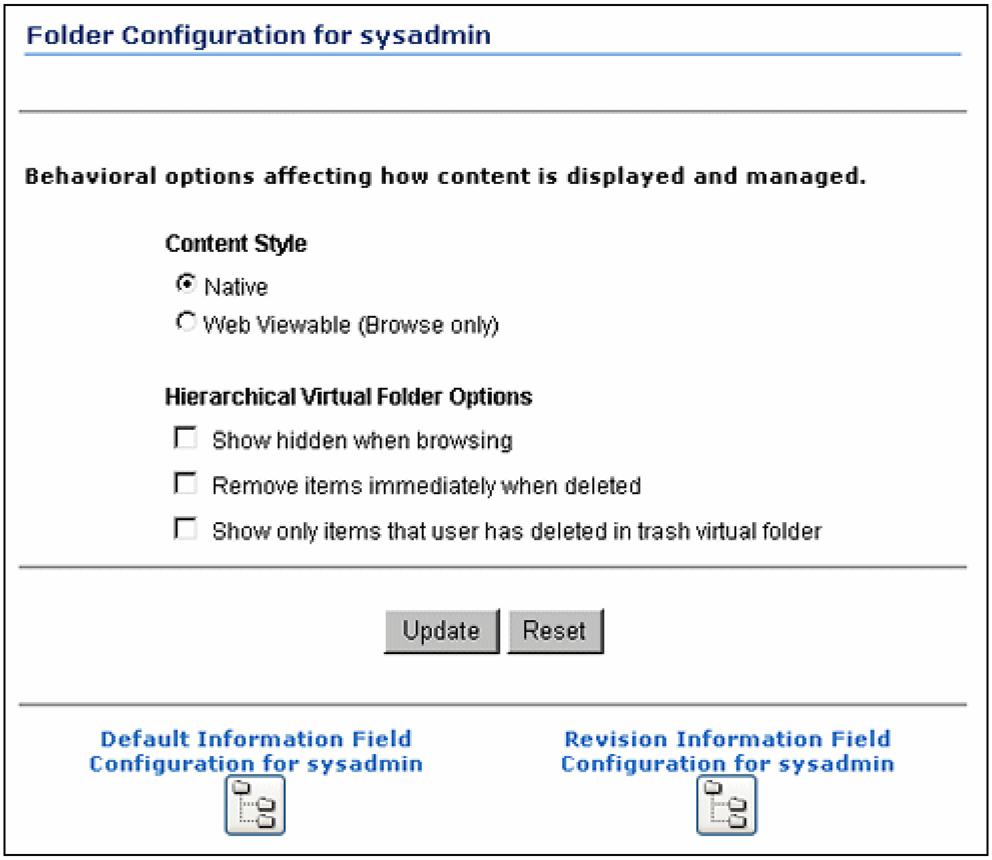
When the Folders component is enabled in Content Server, a **Folder Configuration for *[User]*** button appears on the User Profile page. Clicking this button displays the Folder Configuration Page.



A.7.4 Folder Configuration Page

The Folder Configuration page enables the user to configure their virtual folder interface. To access this page, do one of the following:

- Click the Folder Configuration Link in the My Content Server tray.
- Click the **Folder Configuration for *[User]*** button on the User Profile Page.



Element	Description
Content Style options	**Native =** The native file is displayed when the user clicks a content item in a folder. **Web Viewable (Browse only)** = The web-viewable file is displayed when the user clicks a content item in a folder. The user cannot perform any folder operations when this option is selected.
Hierarchical Virtual Folder Options	**Show hidden when browsing =** When selected, hidden folders and content items are displayed and identified with a dimmed icon; users can still see and work with hidden items. If not selected, hidden folders and content items do not appear in the folder hierarchy. **Remove items immediately when deleted =** When selected, items are deleted immediately (not moved to the Trash folder). If not selected, deleted items are first moved to the Trash folder. **Show only items that user has deleted in trash virtual folder =** When selected, only items that the current user has deleted are displayed the Trash folder. If not selected, all items in the Trash folder are displayed.
Update button	Applies any changes to the system.
Reset button	Resets the options to the last saved condition.
Default Information Field Configuration for *User* button	Displays the Default Information Field Configuration Page.
Revision Information Field Configuration for *[User]* button	Displays the Revision Information Field Configuration Page.

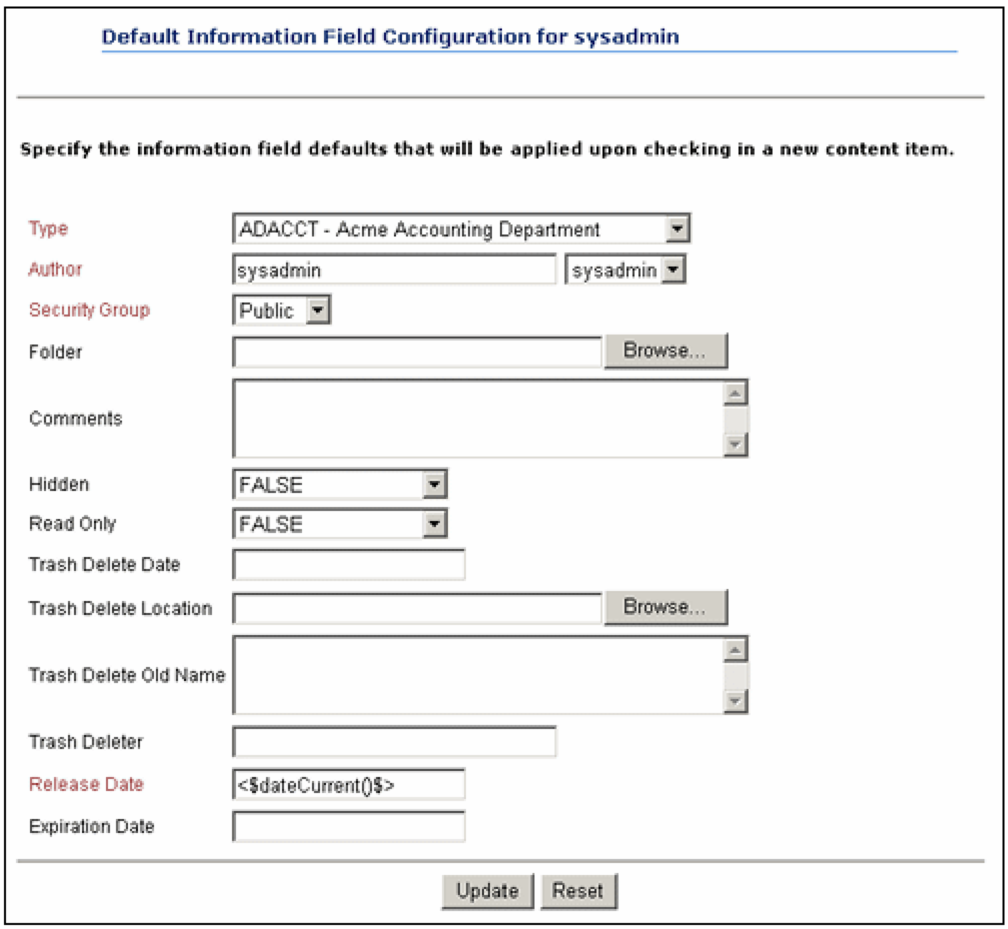
A.7.5 Default Information Field Configuration Page

The Default Information Field Configuration page defines the default metadata values to apply to new content (not subsequent revisions) that the user checks in through a virtual folder.

Important: These default settings *only* apply to content that is pasted through the WebDAV interface. They do not apply if new content is added to the folder through the web browser.

To access this page, do one of the following:

- In the My Content Server tray, expand the **Folder Configuration for *[User]*** link and click the **Default Information Field Configuration for *[User]*** link.
- Click the **Default Information Field Configuration for *[User]*** button on the Folder Configuration Page.



Element	Description
Information fields	Define the metadata values that will be applied to new content (not subsequent revisions) checked in through a virtual folder if values are not already defined for the folder. These metadata values are applied only on initial check-in; these settings do not affect revisions to existing content. ■ Idoc Script can be used in any of the information fields. ■ The default Idoc Script in the Release Date field (<$dateCurrent()$>) applies the current release date and time to content item revisions. ■ Although the Release Date field is required, the content server will automatically use the current date and time if this field1 is left blank. ■ You can specify values for the Trash Delete fields, but they will be overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update button	Applies changes to the user's profile.
Reset button	Resets the fields to the last saved values.

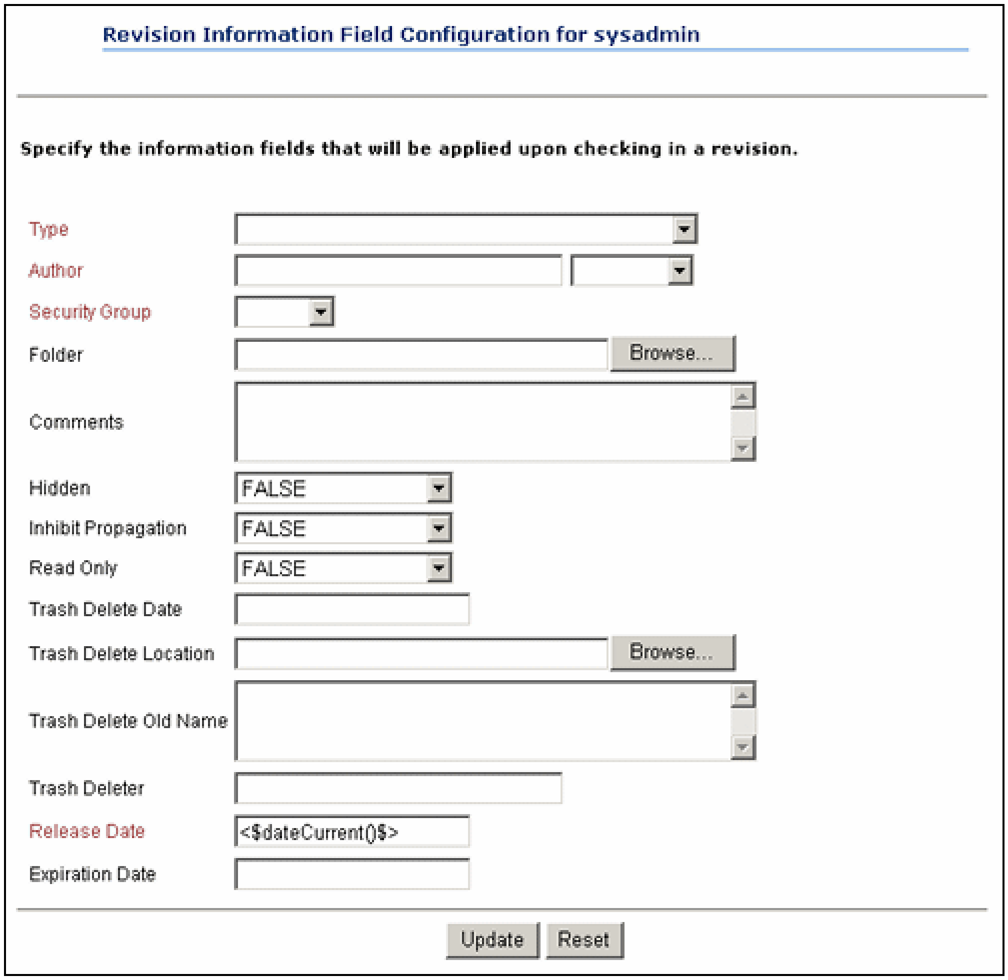
A.7.6 Revision Information Field Configuration Page

The Revision Information Field Configuration page defines the default metadata values to apply to revisions (not new content items) that the user checks in through a virtual folder.

> **Important:** These default settings *only* apply to revisions that are pasted through the WebDAV interface. They do not apply if revisions are added to the folder through the web browser.

To access this page, do one of the following:

- In the My Content Server tray, expand the **Folder Configuration for *[User]*** link and click the **Revision Information Field Configuration for *[User]*** link.
- Click the **Revision Information Field Configuration for *[User]*** button on the Folder Configuration Page.



Element	Description
Information fields	Define the metadata values that will be applied to content revisions (not new content items) checked in through a virtual folder if values are not already defined for the folder. ■ Idoc Script can be used in any of the information fields. ■ The default Idoc Script in the Release Date field (<$dateCurrent()$>) applies the current release date and time to content item revisions. ■ Although the Release Date field is required, the content server will automatically use the *previous revision's* release date and time if this field is left blank. ■ You can specify values for the Trash Delete fields, but they will be overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update button	Applies changes to the user's profile.
Reset button	Resets the fields to the last saved values.

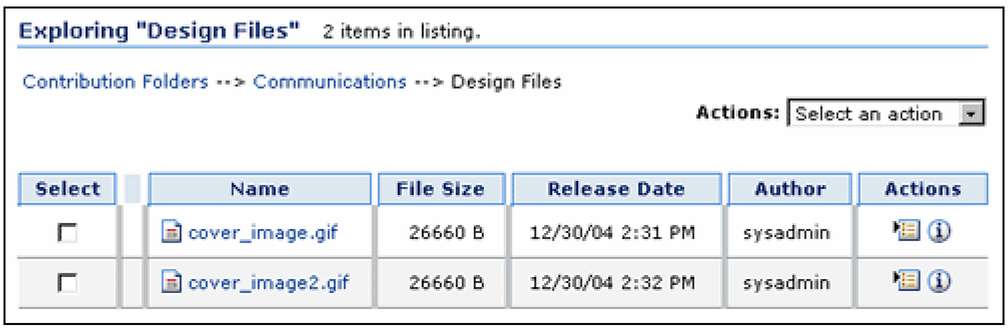
A.7.7 Exploring Contribution Folders

The exploring contribution folders pages are used to work with virtual folders within the hierarchy. To access a folder exploring page, click the folder link under the Contribution Folders Link, or click the folder link on another folder exploring page.

You can customize the look and feel of your exploring pages from your user profile page.

Some of the fields in the My View search results are unavailable or not applicable when browsing through virtual folders. For example, if you enable Vault File Size as a column in your My View, this field will be populated when performing searches, but it will be blank on folder exploring pages.

Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.



Element	Description
Folder path	Displays the folder hierarchy for the current folder. Clicking a link displays the exploring page for that folder.

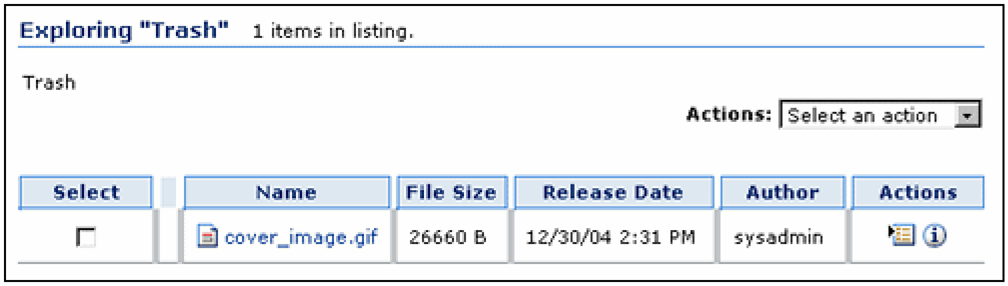
Element	Description
Actions list	**Classic View**: Displays the folder contents in the pre-7.0 format. **Thumbnail View**: Displays the folder contents as icons. **Headline View**: Displays the folder contents in a table. **My View**: Displays the folder contents in your personalized display style. **Customize**: Opens a configuration page where you can modify the personalized My View display. **Select All**: Selects all items in the displayed list (i.e., all Select check boxes are selected at once). **Unselect All**: Unselects all items in the displayed list (i.e., all Select check boxes are cleared at once). **Information**: Displays the Hierarchical Folder Information Page. **New Folder** (for contributors only): Displays the Hierarchy Folder Configuration Page, which is used to create a new folder. This option is not available for guest users. **New Content** (for contributors only): Displays the content check-in form, with the current folder's default metadata already filled in. This option is not available for guest users. **Move**: Displays the Browsing Window, which is used to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function.
Actions list	**Delete:** If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function. **Open Web Folder:** If the Web Folder feature is enabled, displays the current folder as a WebDAV virtual folder in Windows Explorer.
Select check box	**Selected =** The folder or content item will be moved or deleted. **Clear =** The folder or content item is not affected by the move or delete operation.
Name column	**Folder link**: Displays the exploring page for the folder. **File link**: Displays the web-viewable file or the File Download dialog, depending on which content style you selected on the Folder Configuration Page.
Size column	Displays the size of the content item.
Date column	Displays the release date of the content item.
Author column	Displays the author of the content item.

Element	Description
Actions icon for folders	**Folder Information**: Displays the Hierarchical Folder Information Page. **Create Shortcut**: Displays the Browsing Window, which is used to select the target folder for a shortcut link to the current folder. **Move**: Displays the Browsing Window, which is used to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function. **Delete**: If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function.
Actions icon for content items	**Content Information**: Displays the content information page. **Check Out**: Checks out content item and displays the check-out confirmation page. **Check In Similar**: Displays the content check-in form, with a number of metadata field already filled in to match the current content item's metadata. **Send link by e-mail**: Opens the default mail client and automatically generates the Web-Viewable link and Native File link paths in the message area. **Create Shortcut**: Displays the Browsing Window, which is used to select the target folder for a shortcut link to the content item. **Move**: Displays the Browsing Window, which is used to select the target folder for the content item. This action appears only when the system administrator has enabled the Move function. **Delete:** If the Trash Bin function is enabled, this action moves the content item to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes all revisions of the content item. This action appears only when the system administrator has enabled the Delete function.
Information icon	Displays the Hierarchical Folder Information Page for the virtual folder or the content information page for the content item.

A.7.8 Trash Exploring Page

The Trash exploring page is used to work with deleted folders and content items. To access this page, click the **Trash** link under the Contribution Folders Link. You can customize the look and feel of your Trash exploring page from your user profile page. The system administrator must have enabled the Trash Bin function for the Trash exploring page to be available.

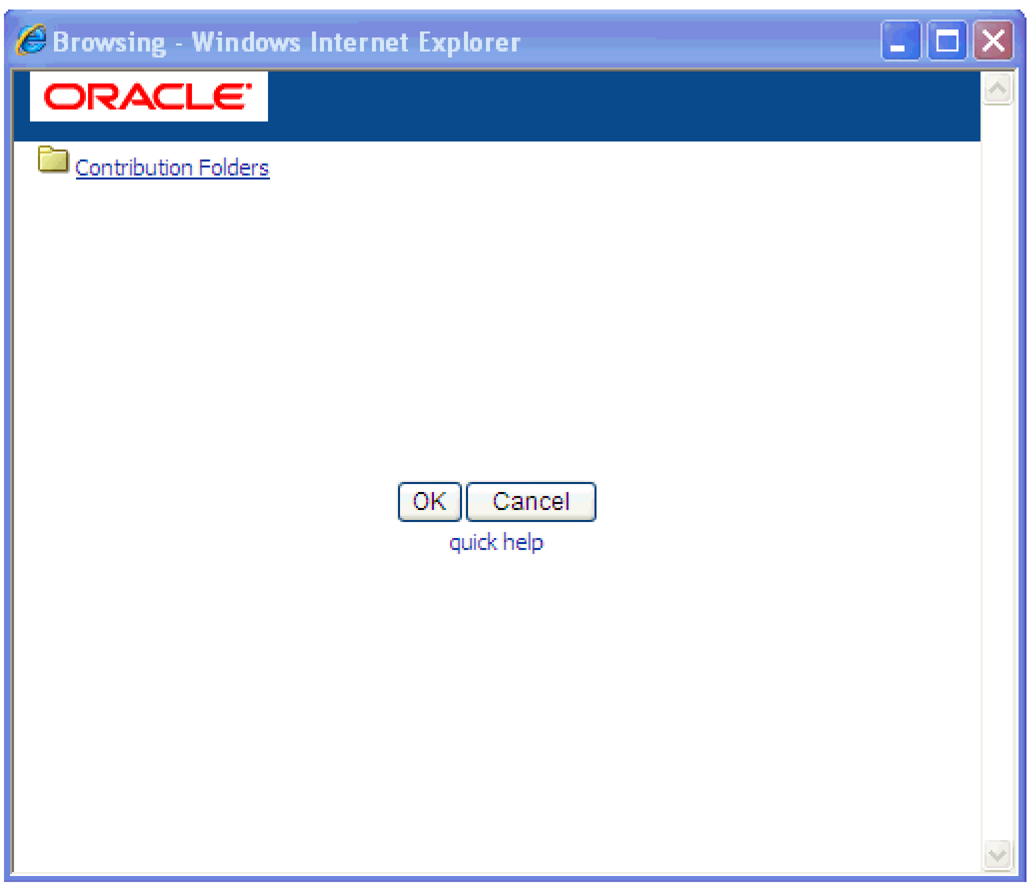
With only one exception, the descriptions applicable list options for each of the features on the Trash Exploring page are identical to those for the Exploring Contribution Folders. The Actions icon for both folders and content items includes a Restore option. Selecting the Restore option returns the item to its original parent folder. If the original parent folder has been deleted and is still in the Trash folder, the restored item will be moved to the original folder. If the original folder has been permanently deleted, you will not be able to restore the item.



A.7.9 Browsing Window

The Browsing window is used to select a target folder for moving items, creating shortcuts, and specifying local folders. To access this window, do one of the following:

- Select one or more items and click the Move icon on the Exploring Contribution Folders.
- Select the Shortcut action on a Hierarchical Folder Information Page or Content Information page.
- Click the Browse button on the Local Folders Page (documented in the *Folders and WebDAV Administration Guide*).



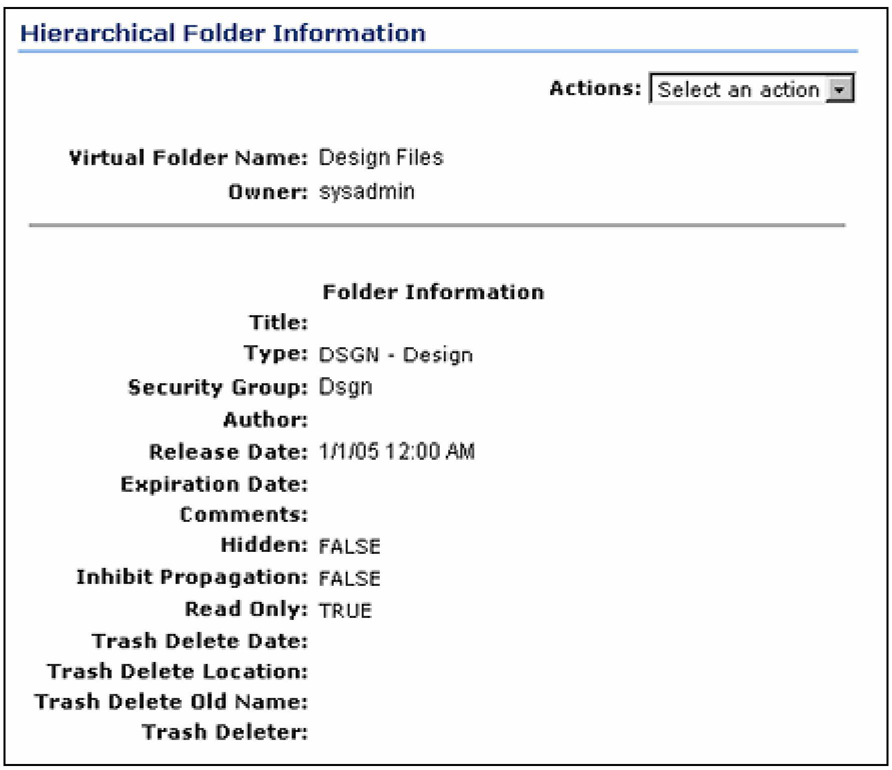
Element	Description
Folder hierarchy	Clicking a folder displays any subfolders.
OK button	Selects the open folder as the target folder. (Lower-level folders may be displayed, but only the open folder is active.)
Cancel button	Closes the Browsing window without selecting a folder.

A.7.10 Hierarchical Folder Information Page

The Hierarchical Folder Information page is used to view information on a virtual folder. There are two ways to access this page:

- By selecting **Information** from the Actions dropdown menu on any of the Exploring Contribution Folders.
- By selecting **Folder Information** from the Actions icon popup menu for a folder on any of the Exploring Contribution Folders.

The page shows the default metadata for the current virtual folder, and, in the case of deleted folders, information about the delete action.



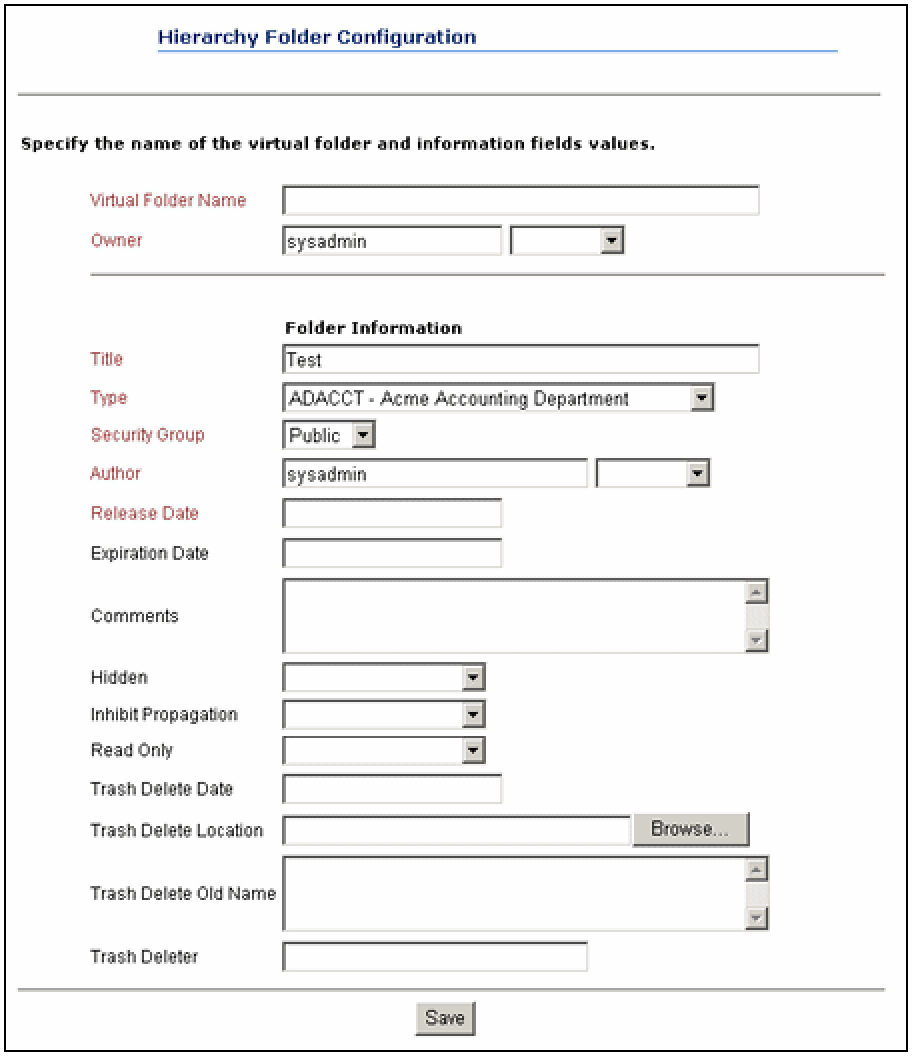
Element	Description
Virtual Folder Name field	The name of the virtual folder.
Virtual Folder Owner field	The user name of the folder's owner. This user can change the folder metadata and delete the folder.
Folder Information fields	Display the metadata values for the folder and content items that are checked in through this folder. These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.

Element	Description
Hidden field	**True** hides the folder. Users will see a dimmed folder icon if they have permission to the folder's security group ***and*** they have selected the "Show hidden when browsing" check box on the Folder Configuration Page. Otherwise, the folder will not be visible in the folder hierarchy. **False** makes the folder visible to all users who have permission to the folder's security group. This field appears only when the system administrator has enabled the Hide/Unhide feature. The Hide/Unhide icons are only visible in the Classic layout. Instead, the Trays and Top menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.
Inhibit Propagation field	**True** prevents metadata changes to the folder during metadata propagation from a higher-level folder. **False** includes the folder in metadata propagation from a higher-level folder.
Read Only field	**True** prevents renaming, moving, or deleting the folder or content items in that folder. Content can still be checked in and folder metadata can be updated. **False** makes all folder operations available. This field appears only when the system administrator has enabled the Read Only feature.
Trash Delete Date field	For deleted folders, this field shows when the folder was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Delete Location field	For deleted folders, this field shows the location of the folder before it was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Delete Old Name field	For deleted folders, this field shows the name of the folder before it was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Deleter field	For deleted folders, this field shows the name of the user who deleted the folder. This field appears only when the system administrator has enabled the Trash Bin feature.
Actions list	**Update:** Displays the Hierarchy Folder Configuration Page. **Create Shortcut:** Displays the Browsing Window, which is used to select the target folder for a shortcut link to the current folder. **Propagate:** Propagates the folder's default metadata values to uninhibited subfolders and content items.

A.7.11 Hierarchy Folder Configuration Page

The Hierarchy Folder Configuration page is used to define or modify virtual folders.

- To access the Hierarchy Folder Configuration page to add a folder, select **New Folder** from the Actions list on any of the Exploring Contribution Folders.
- To access the Hierarchy Folder Configuration page to edit an existing folder, open the Hierarchical Folder Information Page and select **Update** from the Actions list.



Element	Description
Virtual Folder Name field	The name of the virtual folder.
Owner field	The user name of the folder's owner. This user can change the folder metadata and delete the folder.
Folder Information fields	Define the metadata values for the folder and any content items that are checked in through this folder. These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.

Element	Description
Hidden field	**True** hides the folder. Users will see a dimmed folder icon if they have permission to the folder's security group ***and*** they have selected the "Show hidden when browsing" check box on the Folder Configuration Page. **False** makes the folder visible to all users who have permission to the folder's security group. This field appears only when the system administrator has enabled the Hide/Unhide feature. The Hide/Unhide icons are only visible in the Classic layout. Rather than icons, the Trays and Top Menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.
Inhibit Propagation field	**True** prevents metadata changes to the folder during metadata propagation from a higher-level folder. **False** includes the folder in metadata propagation from a higher-level folder.
Read Only field	**True** prevents renaming, moving, or deleting the folder or content items in that folder. Content can still be checked in and folder metadata can be updated. **False** makes all folder operations available. This field appears only when the system administrator has enabled the Read Only feature.
Trash Delete Date field Trash Delete Location field Trash Delete Old Name field Trash Deleter field	You can specify values for these fields, but they will be overwritten with their current field values at the moment the virtual folder is actually deleted. It is therefore recommended that you leave these fields empty. These fields appear only when the system administrator has enabled the Trash Bin feature.
Save button	Saves the new virtual folder. This button appears only when a new folder is being created.
Submit Update button	Saves the changes to the virtual folder. This button appears only when an existing folder is being modified.
Reset button	Resets the fields to the last saved definition of the virtual folder. This button appears only when an existing folder is being modified.

A.8 WebDAV Interface

This section describes the WebDAV interface screens.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

This section covers the following topics:

- "Virtual Folders" on page A-66
- "User Interface" on page A-66

A.8.1 Virtual Folders

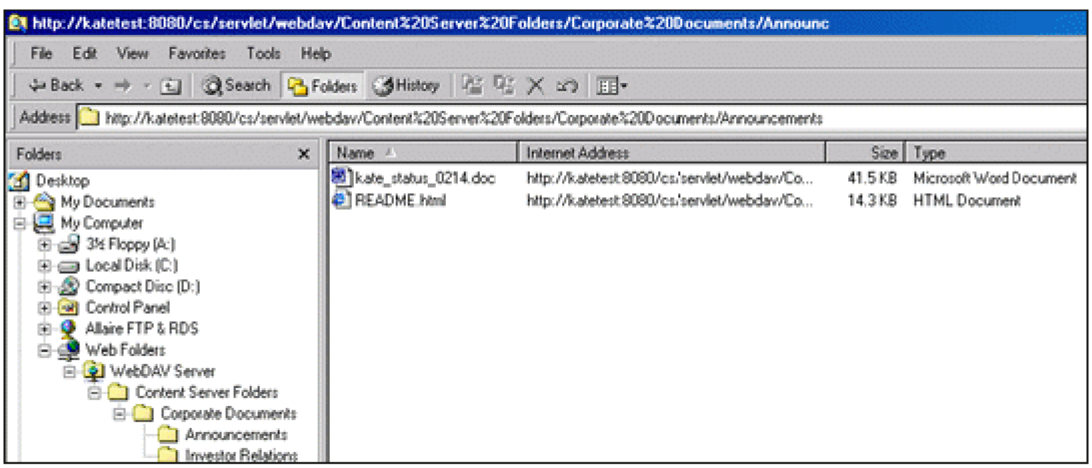
The WebDAV interface is based on the hierarchical Folders interface. The interface to a content server repository is set up as "virtual folders." Each folder contains the content items that have the same numerical "Folder" value, which is assigned automatically upon creation of the folder.

You can work with content items and virtual folders in much the same way you would work with files and folders in a file system. However, typical tasks you perform on files in a file system may have a different effect when you perform them on files in a WebDAV virtual folder. For example, opening a file from a WebDAV virtual folder also checks the content item out of the content server.

The user logins and security controls in Content Server and the Folders component also apply to content that is managed using WebDAV clients. For example, if you have Read permission for a content item, you will be able to view the file, but you will not be able to check in a new revision of the file.

Figure A–1 below shows how a typical set of WebDAV virtual folders would look in Windows Explorer:

Figure A–1 Webdav Virtual Folders in Windows Explorer



A.8.2 User Interface

Some tasks related to WebDAV can be performed from the following Folders web pages:

- "Folder Configuration Page" on page A-53
- "Default Information Field Configuration Page" on page A-55
- "Revision Information Field Configuration Page" on page A-56
- "Hierarchy Folder Configuration Page" on page A-64

A.9 Folio User Interface

This section describes the pages and contextual menus added to Content Server when folios is enabled.

Note: If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.

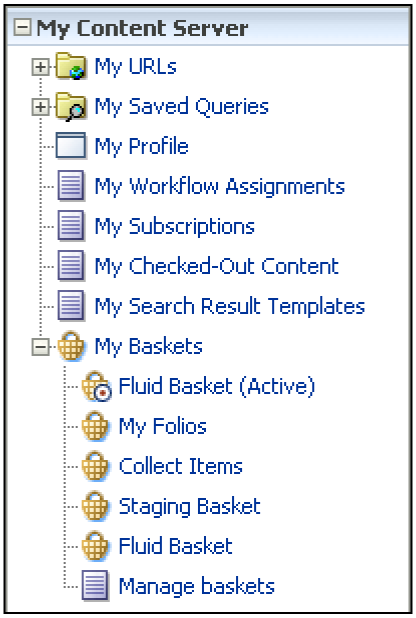
This section covers the following topics.

- "My Content Server Tray: My Baskets" on page A-67
- "Content Management Tray: New Folio" on page A-68
- "Pick Folio Type Page" on page A-68
- "Edit Simple Folio Page" on page A-69
- "Edit Folio Page" on page A-71
- "Set Folio Profile Page" on page A-78
- "Folio Check In Page" on page A-78
- "Folio Check In Confirmation Page" on page A-79
- "View Folio Page" on page A-80
- "Manage Content Baskets Page" on page A-80
- "Content Basket Page" on page A-81
- "Move/Copy Basket Items Page" on page A-82
- "Insert Hypertext Page" on page A-82
- "Subscribe to <folio_name> page" on page A-83

A.9.1 My Content Server Tray: My Baskets

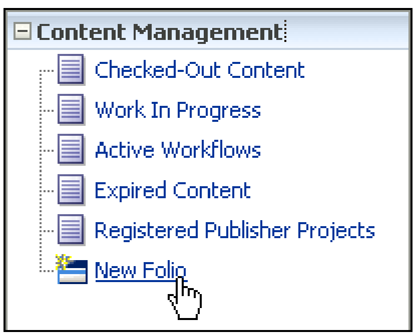
Content Baskets are created by you and used as an unstructured place to collect content you want to access quickly. They are similar to Saved Queries, in that they display a search results page listing content associated with the basket. They differ from Saved Queries in that the only defining criteria for the search is whether or not you have specifically added a content item to a basket.

Content baskets are displayed under the My Baskets folder on the My Content Server tray, and also under the Source Items tray of the Edit Folio Page. Clicking **My Baskets** or **Manage baskets** displays the Manage Content Baskets Page, where baskets can be added, modified, deleted, or made active.



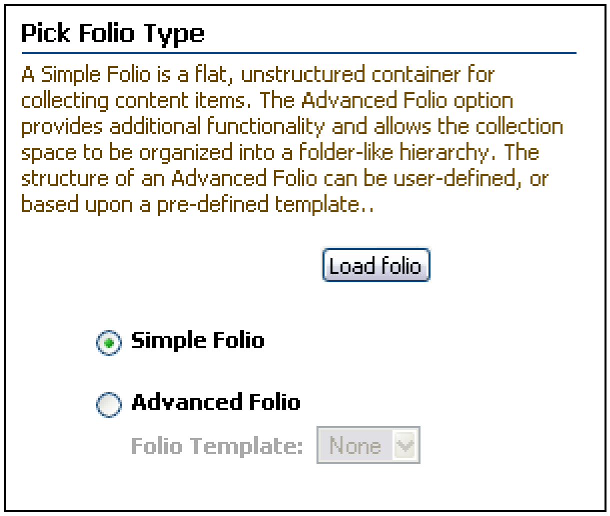
A.9.2 Content Management Tray: New Folio

New folios are created using the **New Folio** link on the Content Management tray. Clicking New Folio displays the Manage Content Baskets Page.



A.9.3 Pick Folio Type Page

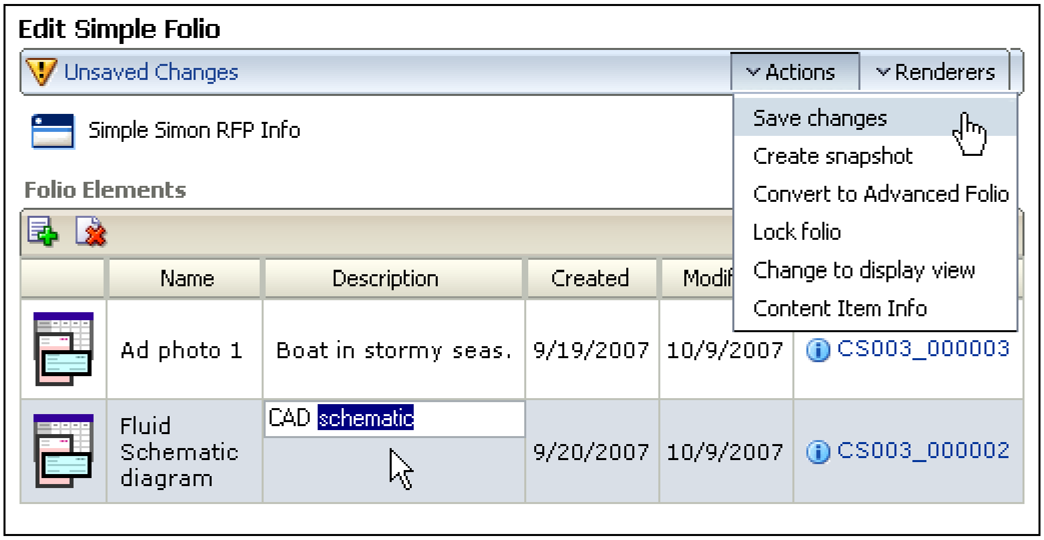
The Pick Folio Type page is accessed by clicking **New Folio** in the Content Management tray. It is used to choose the type of folio to create.



Form Element	Description
Load Folio	Displays the Edit Simple Folio Page or Edit Folio Page for the type of folio selected.
Simple Folio	A simple folio is a folio with no structure established. Items in a simple folio are displayed as a table on the Edit Simple Folio Page, and can be reordered in the table, but not nested in a hierarchy unless the simple folio is converted to an advanced folio. If a simple folio is converted to an advanced folio, it cannot be converted back to a simple folio.
Advanced Folio	An advanced folio has structure. The structure can be predefined by the system administrator in a template selected by the user. The structure of a template-based folio may or may not be modified later, depending on the template. If no template is selected, then the folio is created with no structure established. When this option is selected, a folio is begun with a root level node only, and the structure can be modified later. An advanced folio cannot be converted to a simple folio.
Folio Template	Lists the templates available on which the new folio is based.

A.9.4 Edit Simple Folio Page

The Edit Simple Folio page displays the element info of content associated with a simple folio in a table. Although a simple folio displays content in a manner similar to a standard Content Server search results page, there is an important difference. A standard search results page displays content information from a content item's metadata. The Edit Simple Folio page displays element information from the XML file stored in Content Server that defines the folio. This element information is unique to the folio, and can be changed in the folio without affecting the content item's metadata.



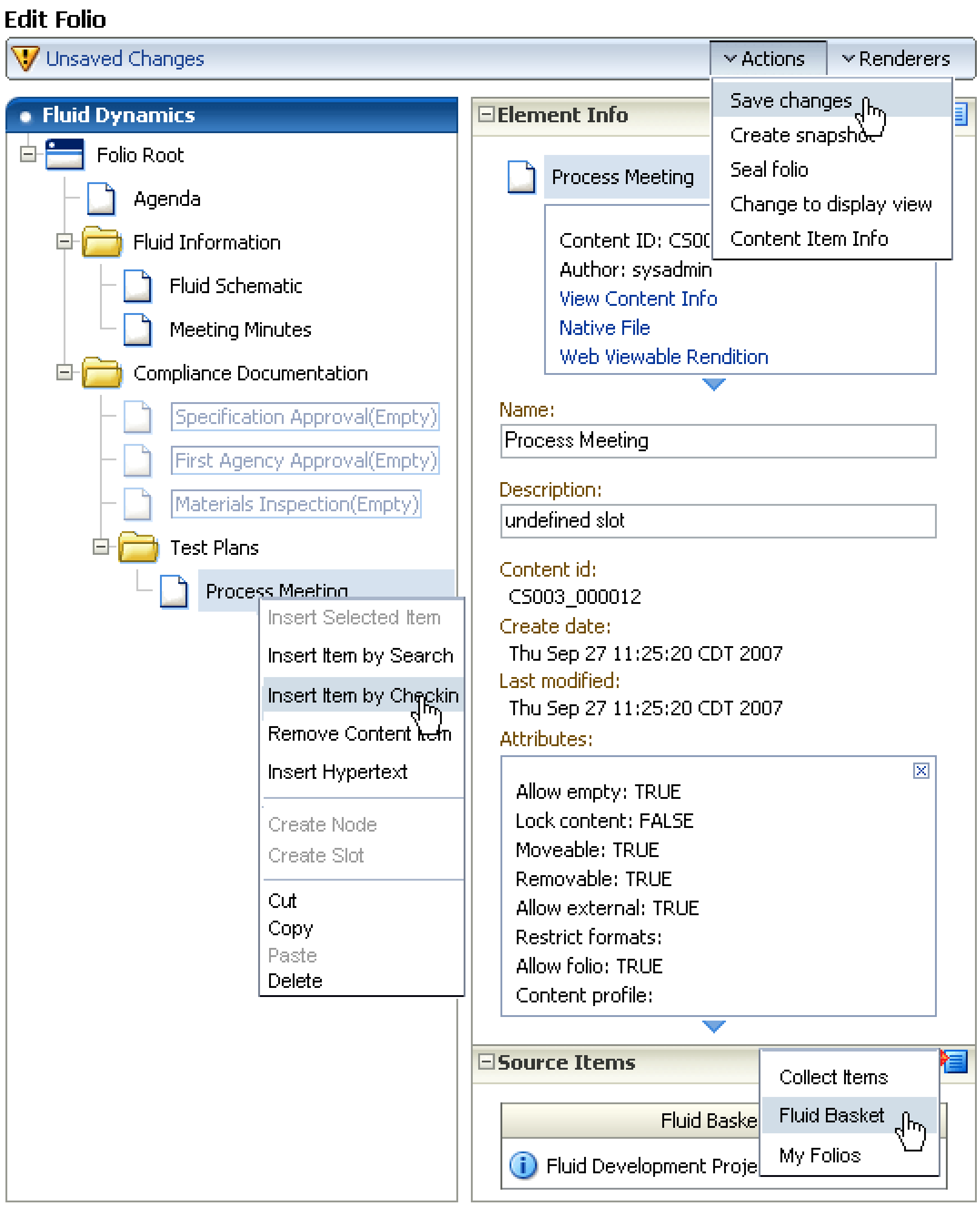
Item	Description
Changes Notification	Displays the status of any changes made to the folio. An icon with an exclamation point indicates unsaved changes. An icon with a check mark indicates changes were saved.
Actions menu	See "Actions Menu" on page A-77
Renderers menu	"Renderers Menu" on page A-77
Add icon	Displays a search from for finding items within Content Server to add to the folio.
Delete icon	Deletes the selected item from the folio. Items are selected by clicking the item row.
Thumbnail column	Displays a small image of the item if your system administrator has set up Content Server to create thumbnails. If thumbnails are not set up, an icon associated with the item type is displayed. Clicking the thumbnail displays the Content Server content information page.
Name	Displays the text entered into the name element of the folio XML file. When a content item is first added to a simple folio, the name element is populated with the content item title metadata from Content Server. After it is associated with a folio, the name element information can be edited independently for each folio with which a content item is associated.
Description	Displays the text entered into the description element of the folio XML file. When a content item is first added to a simple folio, the description element is blank. After it is associated with a folio, the description element information can be edited independently for each folio with which a content item is associated.
Created	Displays the text entered into the creation date element of the folio XML file. When a content item is first added to a simple folio, the creation date element is populated with the creation date from the content item metadata from Content Server.
Modified	Displays the text entered into the modification date element of the folio XML file. When a content item is first added to a simple folio, the modification date element is populated with the current date. The modification date is updated each time the element information is updated. For example, if you edit the description text of an item in the simple folio, the modification date for that item changes. The modification date does not change if changes are made to the content item metadata in Content Server.

Item	Description
Content Item	Displays the Content ID of the associated item and the information icon. Clicking the Content ID displays the web-viewable of a content item. Clicking the information icon displays the standard Content Server content information page for the item.

A.9.5 Edit Folio Page

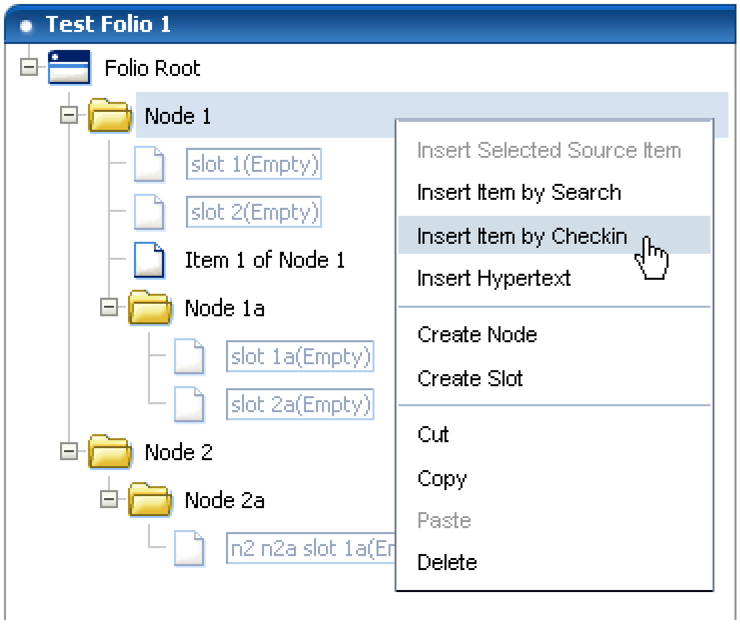
Clicking the content ID or the folio icon in the Actions column of a search result displays the Edit Folio page. From the Edit Folio page, you can add nodes, slots, and items to the folio, find information regarding the folio and its contents, lock or take a snapshot of a folio, and view or render the folio. The left side of the Edit Folio page displays the folio structure. The right side of the Folio is a series of trays, similar to the left area of Content Server. Clicking the heading of a tray expands or collapses the tray. The main areas on the Edit Folio page are:

- Folio Structure Tray
- Element Info Tray
- Source Items Tray
- Actions Menu
- Renderers Menu



A.9.5.1 Folio Structure Tray

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



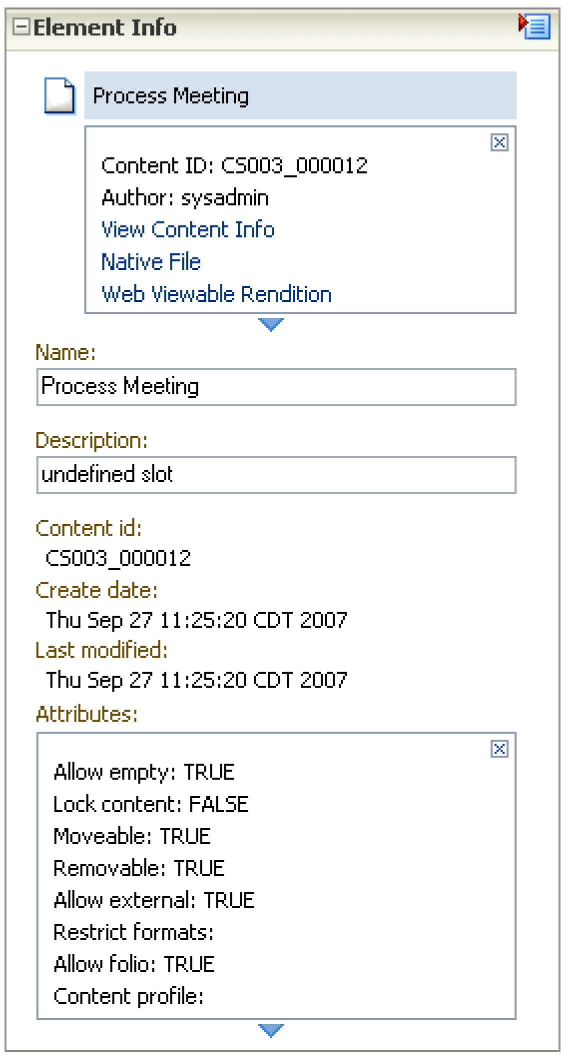
A.9.5.1.1 Folio Structure Contextual Menu The following options are available in the folio structure section contextual menu.

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

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

A.9.5.2 Element Info Tray

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



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

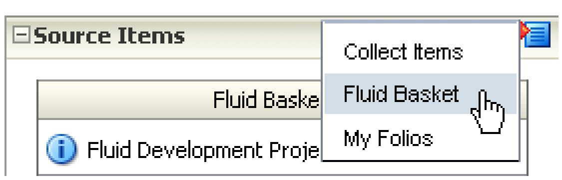
The type of information displayed by default on all elements includes name, description, and attributes. Slots and Content items also display the content ids of the items, as well as their creation date and last modification date. Hyperlinks display the URL of the link.

Information	Description
Title	The title of the item in Content Server.
Content ID	The content ID of the item in Content Server.
Author	The name of the person who last checked the item into Content Server.
View Content Info	Clicking this link opens the content information page for the item in a separate window.
Native File	Clicking this link downloads the native file from Content Server.
Web Viewable Rendition	Clicking this link opens the web-viewable file for the item in a separate window.
Name	The name given the element, as displayed in the folio hierarchy. Displayed for all elements.
Description	A description of the element to help identify its intended use. For example, a slot named *Field Report* could have a description of *Information gathered at the scene by first responders.* Displayed for all elements.

Information	Description
Attributes	Allowable uses and limitations of an element. Attributes are identical for slots and items, but differ for nodes. Default attributes for slots and items: ■ **Allow empty:** The slot can be empty. ■ **Lock content**: Items cannot be deleted from the slot. ■ **Removable**: The slot can be deleted. ■ **Allow external:** An external link can be specified for the slot. ■ **Restrict formats:** Specifies what content item formats are allowed to populate the slot. ■ **Allow folio:** Specifies whether or not a folio can populate the slot. ■ **Content profile:** Specifies the content profile used when adding an item by search or check in. Default attributes for nodes: ■ **Removable:** The node can be deleted. ■ **Children moveable:** Subnodes can be moved. ■ **Allow item creation:** An item can be created within the node. ■ **Allow node creation:** Subnodes can be created within the node. ■ **Maximum Items**: The total number of items that can be created within the node. ■ **Maximum Nodes:** The total number of nodes that can be created within the node. ■ **Content Profile**: Specifies the content profile used when adding an item by search or check in.
Content ID	The unique identifier of a content item used by Content Server. Displayed for items and slots. Slots display this attribute as blank.
Create Date	The date a content item was created. Displayed for items and slots.
last modified	The date changes were last made to the content item. Displayed for items and slots.
link	The URL of the hyperlink. Displayed for hyperlinks only.

A.9.5.3 Source Items Tray

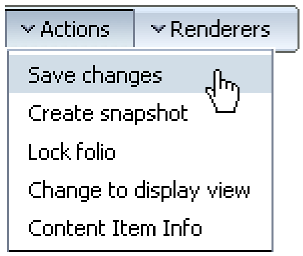
The Source Items tray provides the ability to collect items checked into Content Server for use in the folio. The default allows you to search Content Server and display a listing of search results in the tray, from which you can select items to insert into the folio. This is useful if you have multiple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



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

A.9.5.4 Actions Menu

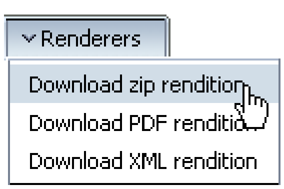
The Actions menu on the Edit Folio Page allows you to access and control the folio versions checked into Content Server.



Item	Description
Save Changes	Saves the folio and any changes to the folio. When saving a folio for the first time, the Set Folio Profile Page is displayed to initiate checking the folio in to Content Server. When saving subsequent changes, the graphic under the page title changes from **Unsaved Changes** to **Changes Saved**. Saving a folio does not update the revision of the folio in Content Server. The revision of a folio is not updated until a snapshot of a folio is made, or until a locked folio is unlocked for additional editing.
Create snapshot	Creates a new revision of the folio in Content Server. When a snapshot is created, the folio hierarchy displayed in the Folio Structure Tray is collapsed, but editing of the folio can continue.
Lock folio	Locks a folio at the latest released revision, preventing further updates unless unlocked. When a folio is locked, the display changes to the View Folio Page.
Create editable revision	Creates a new, unlocked revision of a locked folio. This option is displayed only on the View Folio Page of a locked folio.
Change to display view	Displays the View Folio Page.
Content Item Info	Displays the standard Content Server content information page for the folio.

A.9.5.5 Renderers Menu

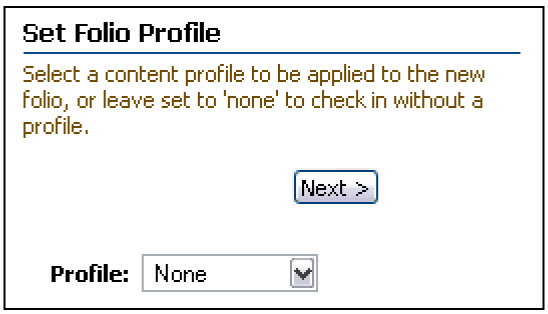
The Renderers menu on the Edit Folio Page allows you to download folio content items in a variety of formats.



Item	Description
Download zip rendition	Downloads a compressed (.zip) file of all folio content for distribution. For example, a folio of catalog art, text, and instructions can be compressed and downloaded into a single .zip file to give to the print vendor.
Download PDF rendition	Downloads all folio content that has a PDF version available, consolidated into one printable portable document format (PDF).
Download XML rendition	Downloads an XML file articulating the folio hierarchy.

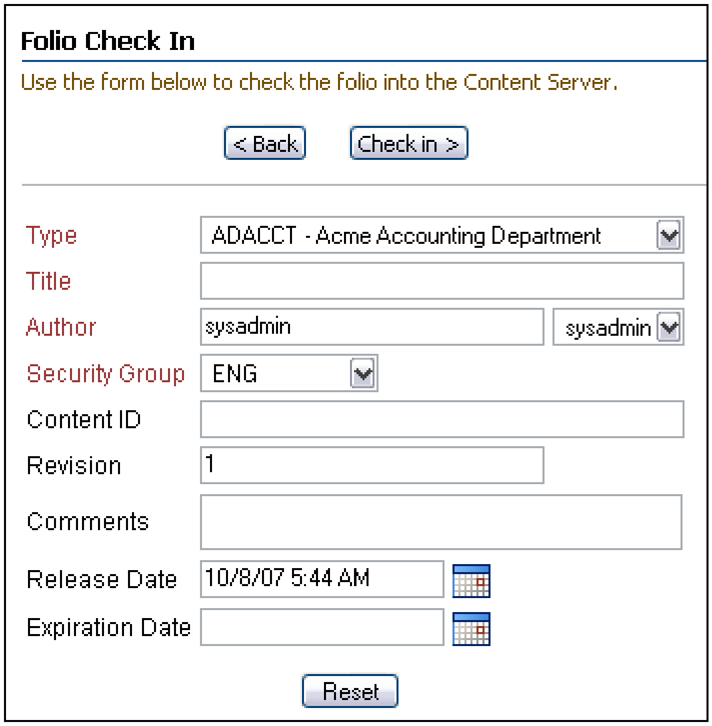
A.9.6 Set Folio Profile Page

The Set Folio Profile page is accessed when you first select **Save folio** from the Actions menu of either the Edit Simple Folio Page or Edit Folio Page. It allows you to select a Content Server profile for the folio if your system administrator has created any.



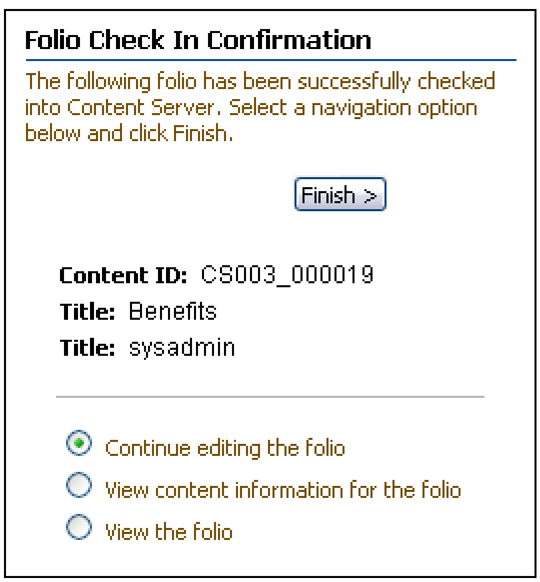
A.9.7 Folio Check In Page

The Folio Check In page is accessed by clicking **Next** on the Set Folio Profile Page. It displays a modified Content Server check in form that allows you to specify metadata for the folio.



A.9.8 Folio Check In Confirmation Page

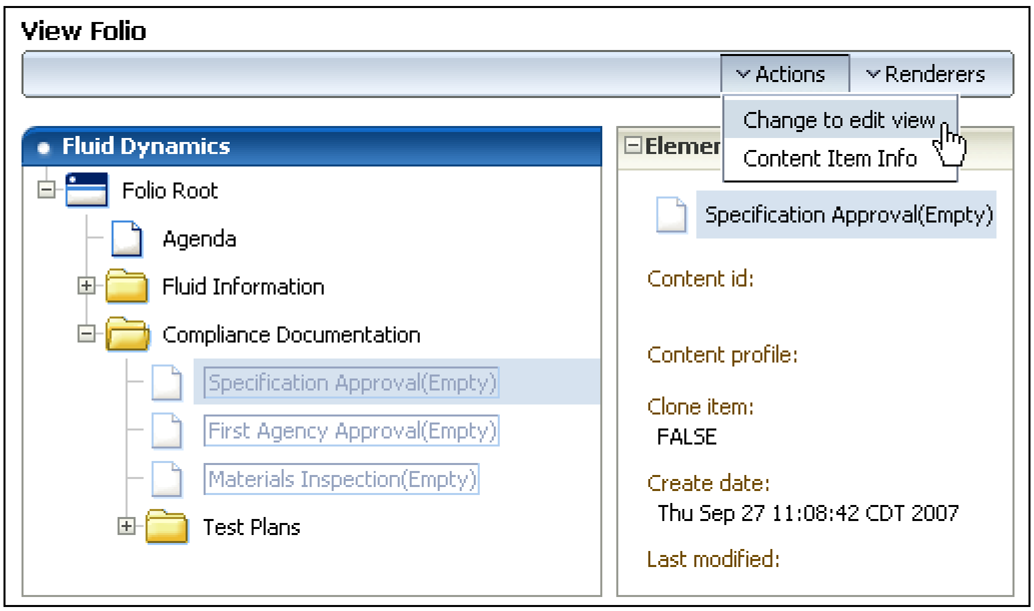
The Folio Check In Confirmation page is accessed by clicking **Check in** on the Folio Check In Page. It confirms the folio has been successfully checked into Content Server, and provides you with the following options of how to proceed when clicking **Finish**:



Option	Description
Continue editing the folio	Displays the Edit Simple Folio Page or Edit Folio Page of the folio checked in.
View content information for the folio	Displays the standard Content Server content information page for the folio.
View the folio	Displays the View Folio Page for the folio.

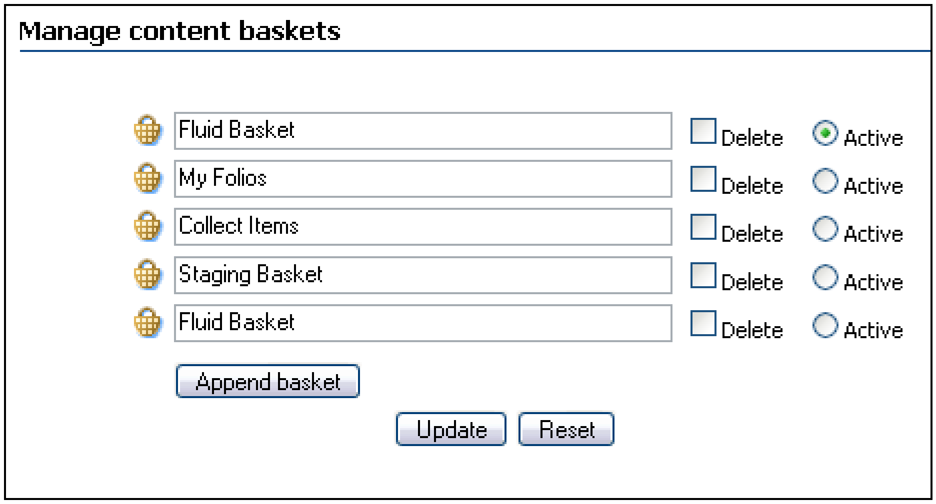
A.9.9 View Folio Page

By default, the View Folio page is identical to the Edit Folio Page, displaying the folio as a folder hierarchy with nodes, slots, and items. However, because the folio is stored in Content Server as an XML file, your system administrator can create additional folio views to display folio structure in a way more relevant to your business, and may set a new default view. When displayed as a view, the folio cannot be edited.



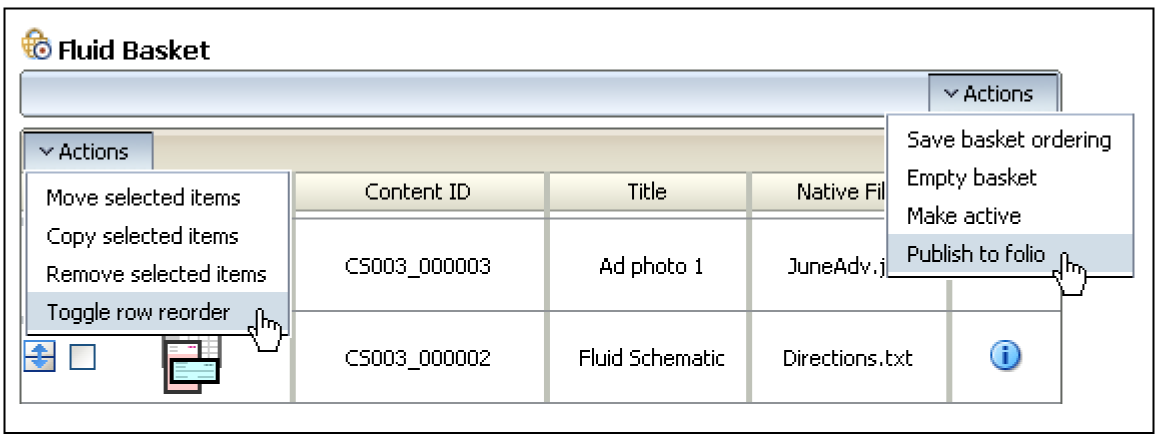
A.9.10 Manage Content Baskets Page

The Manage Content Baskets page is accessed by clicking My Baskets on the My Content Server tray, or by clicking Manage Baskets under the My Baskets folder on the My Content Server tray. The Manage Content Baskets page allows you to append, rename, or delete a content basket, and to set which is the active basket.



A.9.11 Content Basket Page

The Content Basket page is accessed by clicking a basket under the My Baskets folder on the My Content Server tray. The Content Basket page is a search results listing showing all items you have explicitly placed in this content basket.

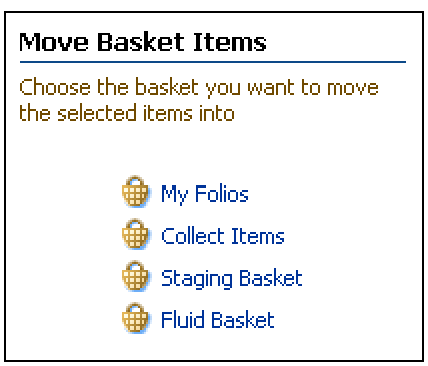


Item	Description
Thumbnail Column	Displays an icon of the item type, or a thumbnail of the content item if your system administrator has set up Content Server to create them.
Content ID	Displays the content ID of the content item.
Title	Displays the title of the content item.
Native File	Displays the name of the native file of the content item.
Info	Clicking the info icon displays the content information page of a content item.

Item	Description
Table Actions Menu	The table actions menu lists actions that can be applied to any selected item or items in the content basket. ■ **Move selected items:** Displays the Move/Copy Basket Items Page, allowing you to select a different basket in which to move the item. ■ **Copy selected items**: Displays the Move/Copy Basket Items Page, allowing you to select an additional basket in which to copy the item. ■ **Remove selected items:** Removes selected items from the content basket. ■ **Toggle row reorder:** Displays up and down arrows that allow you to move rows within the basket to reorder them. After reordering the rows, you must select Save basket ordering from the page actions menu to preserve the new order.
Page Actions Menu	The page actions menu lists actions that can be applied to the entire content basket. ■ **Save basket ordering:** Saves any changes made to row order using the Toggle row reorder action from the Table Actions menu. ■ **Empty basket**: Removes all items from the content basket. ■ **Make active**: Makes the displayed basket the active basket. Content items in Content Server can be added only to the active basket. ■ **Publish to folio:** When selected, all items in the content basket with be added to a new advanced folio with a flat hierarchy.

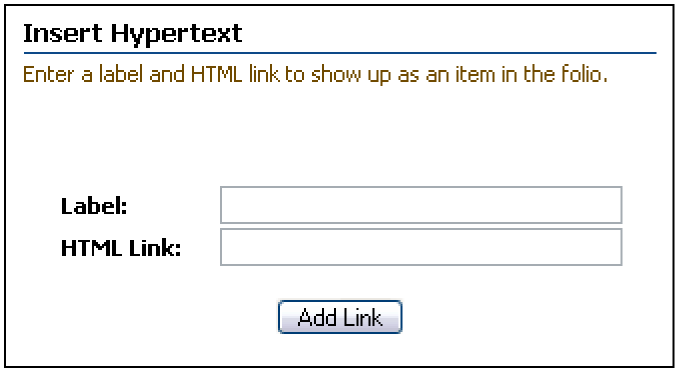
A.9.12 Move/Copy Basket Items Page

The Move/Copy Basket Items page is accessed by selecting a content item or items in a content basket from the Content Basket Page, and selecting either **Move selected items** or **Copy selected items** from the table Actions menu. Click the basket on the page to which you want to move the item or items.



A.9.13 Insert Hypertext Page

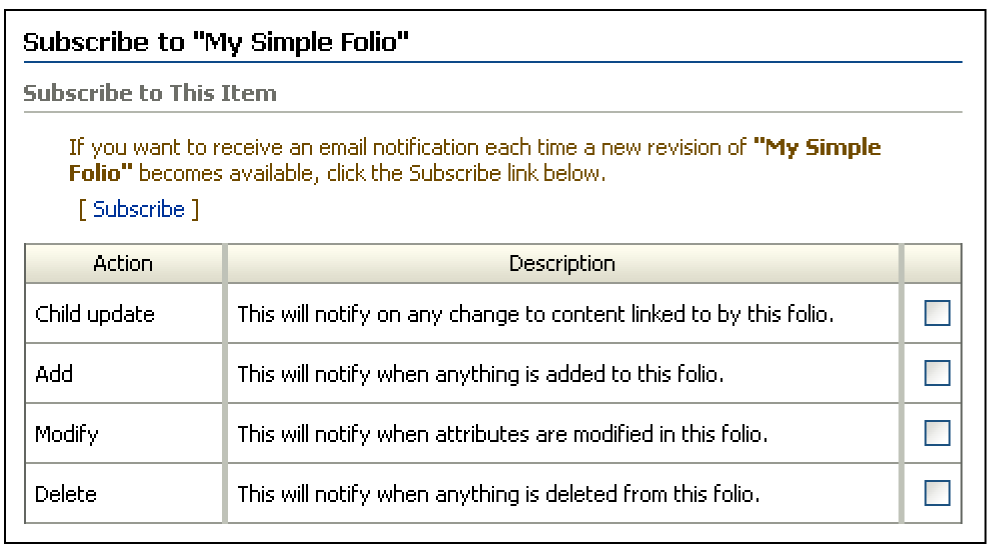
The Insert Hypertext page is accessed by selecting Insert Hypertext from the Folio Structure Contextual Menu on the Edit Folio Page. It allows you to add a label and hypertext link as a new item in the folio structure.



Item	Description
Label	A description or other identifier for the item.
HTML Link	The URL of the hypertext link. For example, http://templates.company.com.

A.9.14 Subscribe to <folio_name> page

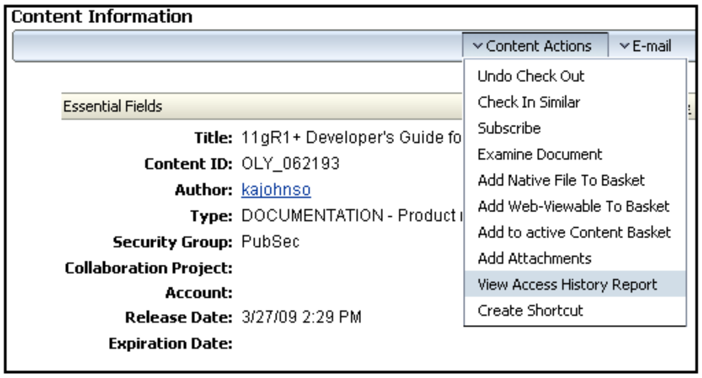
The Subscribe to <*folio_name*> page is accessed by selecting Subscribe from the page Actions menu of a Content Server content information page for a folio. Selecting the desired actions from the list and clicking Subscribe notifies you when the actions have occurred.

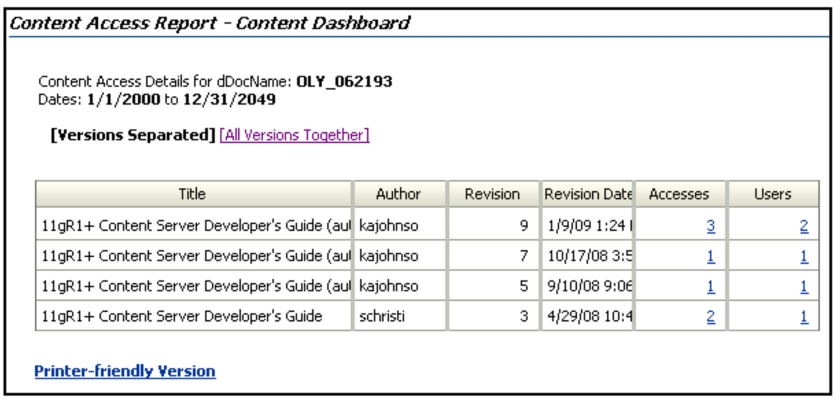


A.10 Content Tracker Interface

When enabled, the Content Tracker component enables users to generate a pre-defined access history report of a content item. To generate this report, select the **View Access History Report** option from the Content Actions menu on the document's Content Information page.

> **Note:** If you are using Firefox set to open new tabs instead of windows, help screens launched from an Admin Applet are not accessible until the applet window that launched the help is closed. Therefore, it is preferable to set Firefox to open in new windows instead of tabs.





Field	Description
Report Name field	The name of the selected query report.
Dates field	The dates entered in the Start Date and End Date fields. If you did not enter specific dates, the default dates are used for the query.
Results table columns	Provide the relevant information for the selected report.
Printer-friendly Version link	Opens a new browser window and displays the report without the navigation trays.

Glossary

access

The level of permission a member has to a content item. See also permission.

access list

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

account

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

account hierarchy

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

account prefix

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

active report

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

administration applets

See administration application.

administration application

One of the following Java applications that are used for administration purposes: User Admin, Workflow Admin, Web Layout Editor, Repository Manager, Configuration Manager (system administrator only), Archiver (system administrator only).

These applications can be run as a Java applet from a Java-enabled browser, or in stand-alone mode from the content server computer.

administration rights

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

administrator

Person in an organization that manages all or part of a content server system. See also consumer, contributor, subadministrator, and system administrator.

admin permission

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

- Viewing content
- Checking in content
- Checking out content
- Getting a copy of content
- Deleting content
- Checking in content with another user specified as the author;
- Using the User Admin, Workflow Admin, Web Layout Editor, and Repository Manager administration applications (the user must also have administration rights for the application).

See also read permission, write permission, and delete permission.

admin role

A standard role that gives the user read, write, delete, and admin permission to all security groups and rights to all administration tools. This role does not allow a user to access the Admin Server. See also guest role, contributor role, and sysmanager role.

Advanced Search

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

alias

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

#all

A special account classification that can be used to assign a user a single permission level for all accounts.

alternate file

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

approve

To accept a revision in a workflow. See also reject.

ascending sort order

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

associated discussion

A discussion that is related to a particular folder or content item. See also discussion.

authentication

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

Author

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

authorization type

The way that Oracle groups users, depending on how their user attributes are defined: local user, global user, or external user. Also referred to as *user type*.

automatic numbering

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

autonumber prefix

An optional prefix that is placed before the sequential portion of the content ID when automatic numbering is enabled.

basic subscription

A subscription to an individual piece of content by content ID. See also criteria subscription, forced subscription, and open subscription.

basic workflow

A type of workflow where specific content items are entered into a workflow by an administrator. See also criteria workflow.

caption

See field caption.

check in

To submit a file to the content server file repository.

check out

To lock a content item in the content server file repository so that no other users can revise it. Other users can still view and get a copy of a checked out content item. See also undo check-out.

check out and open

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

child

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

choice list

See option list.

Classic View

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

Comments

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

consumer

A content server user who only needs to find, view, and/or print content. See also contributor, subadministrator, and administrator.

consumption site

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

content

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

content ID

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

content information

See metadata.

content item

A file that has been checked in to the Content Server repository. A content item includes a primary file and metadata, and can include an alternate file.

content profile

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

content repository

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

content type

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

contribution site

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

contributor

(1) A content server user who creates, revises, and collaborates on documents. See also consumer, subadministrator, administrator.

(2) A user who submits a content item to a basic workflow.

contributor role

A standard role that gives the user read and write permission (RW) to the Public security group. See also guest role, admin role, and sysmanager role.

conversion

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

core

The basic functionality of Content Server.

criteria subscription

A subscription to a group of content items based on metadata criteria. See also basic subscription, forced subscription, and open subscription.

criteria workflow

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

current revision

See latest revision.

custom metadata field

An administrator-defined metadata field.

Deleted status

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

delete permission

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

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

See also read permission, write permission, and admin permission.

dependent choice list

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

descending sort order

Arrangement of data in high to low sequence; for example, from Z to A or from 9 to 0. See also ascending sort order.

discussion

A set of threaded messages that enable project members to comment on projects, folders, content items, and general topics.

documents without accounts

A special account classification that assigns a permission level for content items that do not have an account specified. Same as #none.

document type

A designation used to group similar documents by category (for example, "Invoices").

Done status

The revision status that indicates that the revision has been indexed and is waiting to be released on its specified release date.

download

To copy a file from the content server to your local hard disk.

download applet

An optional Java applet that enables users to download multiple content items at the same time. The content items can also be checked out during the download process. See also multiple file check-out.

editor

A user who can approve, reject, and check out a workflow item for editing.

Edit status

The revision status that indicates that the revision is at the initial contribution step of a workflow.

Expanded Form

The form on the advanced search page that displays all available metadata fields on a single page. See also Query Builder Form and Advanced Search.

expiration date

The date and time when a revision is no longer available for searching or viewing in the content server.

Expired status

The revision status that indicates that the revision is no longer available for searching or viewing in the content server.

external collection

A set of content files that are indexed and stored in a separate search engine collection rather than in the content server database.

external members

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

external user

An authorization type where user security attributes (password, roles, and accounts) are stored in an external storage system. External users might use a Microsoft network login or another type of provider (LDAP) login. See also local user and global user.

field caption

The name of a metadata field as it appears on web pages. For example, "Content ID" is the field caption, while the internal field name is "dDocName".

file format

The structure of a file. The file format is determined by the application used to create the file, and can typically be determined by the file extension (such as *.pdf* or *.doc*).

folder

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

Folder Name

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

folder owner

See owner.

Folders component

A Content Server "Extras" component that is required as a foundation for Content Server.

forced subscription

A subscription where users and/or aliases are assigned to the subscription by an administrator. If individual users are assigned, each user can unsubscribe if they wish. If an alias is assigned, the users in that alias cannot unsubscribe. See also open subscription, basic subscription, and criteria subscription.

format

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

full-text indexing

The process of creating a searchable index that includes every word in a file.

full-text search

A search that compares the query expression against every word in a file. See also metadata search.

full-text search operator

A word or symbol that refines the query expression for a full-text search (for example, AND, OR, and double quotation marks ").

GenWWW status

The revision status that indicates that the revision is being converted to web-viewable format or is being indexed, or has failed conversion or indexing.

global user

An authorization type where user security attributes (password, roles, and accounts) are stored on master content server, but the user has access to proxied content servers as well. Global users are considered "lightly managed" users, as this authorization type limits some of the user functions in order to enhance scalability and performance. It should be noted that all self-registered users are global users by default. See also local user and external user.

group

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

guest portal page

The web page that users see after they start Content Server but before they log in. See also login portal page.

guest role

A standard role that gives the user read permission (R) to the Public security group. A login is not required to access content items in the security groups for which the *guest* role has permission. This role is assigned to anonymous users by default. See also contributor role, admin role, and sysmanager role.

Headline View

A predefined search result template showing content information for each returned content item on a single line of a search result list.

historical report

A list that contains the results of a database query that was performed at a specific date and time. This type of report provides a "snapshot" of content server information as it existed at a particular moment. Historical reports are built with the Web Layout Editor and accessed through the Library. See also active report.

Home page

See guest portal page and login portal page.

Idoc Script

Oracle's proprietary server-side script language that is used to modify the functionality and look-and-feel of Content Server and related products. Idoc Script tags are in the format <$script$>.

Inbound Refinery

Content Server software that converts native files to web-viewable files, along with specific conversion add-on products (such as PDF Converter or XML Converter).

index

The name of the web page at the highest level of the Library hierarchy in the Web Layout Editor. All other pages are at a lower level than (are children of) the index page.

Indexer

Software included with Content Server that full-text indexes files and stores the indexed words in a database. When you do a full-text search for content, the Content Server looks for the search terms in this index. See also search index.

information field

See metadata field.

instance

A single copy of Content Server. Multiple content server instances may be running on the same computer.

internal field name

The name of a metadata field as it appears on web pages. For example, "Content ID" is a field caption, while the internal name of the field is "dDocName".

internal members

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

internet-style search syntax

Search techniques common to the most popular internet search engines.

item

A content item, folder, or discussion.

latest notification

The most recent date and time that a user was sent a subscription notification e-mail for a particular content item.

latest notification use

The most recent date and time that a user accessed a particular content item from a subscription notification e-mail.

latest revision

The most recent version of a content item.

Library

A hierarchical structure of links that organizes content items based on metadata criteria. Users can drill down through the levels of the Library to find content items they are looking for. The Library hierarchy is built using the Web Layout Editor application, and is accessed by users through the Library link in the portal.

locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues, such as date formatting and full-text indexing. See also system locale and user locale.

local page

A type of link in the hierarchical link structure (the "Library") that links to another web page that contains more local page links, URL links, and/or query links.

local user

An authorization type where user security attributes (password, roles, and accounts) are stored on master content server, and the user is included in all local content server functions. See also global user and external user.

log in

To gain access, or sign in, to the Oracle system. Logging in requires users to identify themselves by entering their user name and password, which Content Server uses to grant security permissions to content and rights to administrative functions.

login

See user name.

login portal page

The web page that users see after they log in. See also guest portal page.

major revision

The primary revision label (for example, the number portion of the revision sequence 1a, 1b, 2a, 2b). See also minor revision.

member

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

metadata

Information about a content item, such as title, author, or security group. Metadata is used to describe, find, and group content items. Also referred to as *content information*.

metadata field

A field on a web page that is used to define metadata during check-in, or to define search criteria. Also referred to as *content information field*.

metadata propagation

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

metadata search

A search that compares the query expression against metadata field values. See also full-text search.

minor revision

The secondary revision label (for example, the letter portion of the revision sequence 1a, 1b, 2a, 2b). See also major revision.

multiple file check-in

An optional feature of Content Server that enables users to check in multiple content items as a single compressed zip file. See also upload applet.

multiple file check-out

An optional feature of Content Server that enables users to check out and download multiple content items at the same time. See also download applet.

My Checked-Out Content

Name of main menu element which provides links to a list of content that is currently checked out.

My Content Server

Name of main menu element which provides links to a number of user-specific tasks and options.

My Profile

Link in the toolbar and the My Content Server tray. See User Profile.

My Saved Queries

Name of main menu element which opens a list of queries that have been saved by the current user.

My Search Result Templates

Name of main menu element which provides links to the "Search Result Templates for 'User' Page" on page 3-14, where you can specify what content item information is listed on a search results page and how that information is displayed.

My Subscriptions

Name of main menu element which opens a list of content items that the current user is subscribed to.

My URLs

Name of main menu element which opens a list of URLs that have been saved by the current user.

My View

Name of search result template which allows you to specify the displayed metadata and how it is organized.

My Workflow Assignments

Name of main menu element which opens a list of content items in a workflow that the current user is assigned to do something with (for example, review).

native application

A software application that was used to create an original file that was checked in to the content server (for example, Microsoft Word or Adobe Photoshop).

native file

The original file that is checked into the content server file repository. See also primary file.

native file format

The file format that an original file was created in.

#none

A special account classification that assigns a permission level for content items that do not have an account specified. Same as documents without accounts.

notification

The act of informing users through e-mail. In Content Server, e-mail notification is used in subscriptions and workflows.

open subscription

A type of subscription where users manually subscribe to content items through a basic or criteria subscription. See also forced subscription, basic subscription, and criteria subscription.

option list

A list on a Oracle web page from which users can choose an item.

original file name

The name of the native file that was checked in as the primary file.

owner

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

page properties

The page title, page description, security group, and links for a specific web page defined in the Web Layout Editor.

parent

A page or folder that is one level higher in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also child.

pass through

The process of storing a native file in the *weblayout* repository without converting it to a web-viewable format. Inbound Refinery may pass through a file if it cannot be converted (for example, because the native application is not supported), if a pass-through file format is specified during check-in, or if there is no need to convert the file (for example, if the original file is already in PDF format).

Pending status

The revision status that indicates that the revision is in a basic workflow and is waiting for approval of all revisions in the workflow.

permission

The access that a user has to a particular security group or account. See also read permission, write permission, delete permission, and admin permission.

persistent URL

The URL (web address) that always points to the most recent version of a content item. When a new revision is checked in, the file name of the previous revision is changed to reflect the revision number (for example, 002050~1.pdf, 002050~2.pdf, and so on), and the new revision takes on the content ID as the file name (for example, 002050.pdf). The directory location of the file remains the same as long as the security group, Type, and account are not changed.

personal URL

A link from the portal navigation bar to a URL (web address) that a user accesses frequently.

plain folders

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

Portal Design

A Content Server feature that enables users to personalize their portal navigation bar.

portal navigation bar

The customizable navigation area on the left side of most Content Server web pages. See also portal page.

portal page

See guest portal page and login portal page.

post

A message that is submitted to a discussion.

primary file

The original file that is checked in to the Content Server repository. See also native file and alternate file.

privilege

See permission.

project

The top-level unit of organization in Content Server.

project ID

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

project lead

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

Project Name

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

propagation

See metadata propagation.

Public

A predefined security group. By default, no login is required to view Public content.

query

See search.

Query Builder Form

A form that allows queries to be built by using lists to select the metadata fields to be searched.

query expression

A statement that specifies the criteria to be matched during a search. See also search criteria.

query link

A link on a Library page that displays a list of content items that meet the specified search criteria.

query result page

See search results page.

Quick Help

A button on Oracle web pages that provides context-sensitive help.

Quick Search

A function that enables users perform a search from the portal navigation bar. See also Advanced Search.

read permission

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

- viewing content
- getting a copy of content.

See also write permission, delete permission, and admin permission.

refinery

See Inbound Refinery.

reject

To disapprove a revision in a workflow. See also approve.

release date

The date and time when a revision is available for searching and viewing in the content server.

Released status

The revision status that indicates that the revision is available in the content server.

rendition

A particular file associated with a content item, such as the primary file, alternate file, or web-viewable file.

report

A list that contains the results of a content server database query. There are two types of reports, active report and historical report, which are built with the Web Layout Editor and accessed through the Library.

repository

See content repository.

Repository Manager

An administration application that is used to do these tasks:

- Manage content items (view status, delete revisions, and so on)
- Create criteria subscriptions and assign users to subscriptions
- Update and rebuild the search index

required field

A metadata field that must have a value for a content item to be checked in.

reviewer

A user who can approve or reject a workflow revision but cannot check it out for editing. See also reviewer/contributor.

reviewer/contributor

A user who can approve, reject, and check out a workflow revision for editing. See also reviewer.

reviewer/contributor step

A type of workflow step where users can approve or reject a revision and check it out for editing. See also reviewer step.

reviewer step

A type of workflow step where users can approve or reject a revision but cannot check it out for editing. See also reviewer/contributor step.

Review status

The revision status that indicates that the revision is in a workflow and is being reviewed.

revision

A new or revised version of a content item. By default, revisions are numbered sequentially starting with Revision 1, and every time the content item is checked out and checked in again, the revision number is incremented by one.

revision history

A record of all revisions for a particular content item. The files and metadata can be accessed for all previous revisions that have not been deleted.

revision status

The status of a revision in the content server. The revision status can be Done status, Edit status,GenWWW status,Released status, Pending status,Expired status, Deleted status, or Review status.

rights

The access that a user has to any of the following administration applications:

- User Admin
- Repository Manager
- Workflow Admin
- Web Layout Editor.

See also subadministrator.

role

A set of permissions for each security group. Each user is assigned one or more roles that define their access to content. There are four predefined roles:

- guest role
- contributor role
- sysmanager role
- admin role.

See also permission and security group.

route

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

R permission

See read permission.

RW permission

See write permission.

RWD permission

See delete permission.

RWDA permission

See admin permission.

saved query

A link from the portal navigation bar to a particular search that a user performs frequently.

score

A search results sorting option that rates each file with a number to determine how closely it matches the full-text search criteria. The higher the score, the closer the match.

search

To retrieve a list of content items that match specified criteria.

search criteria

The metadata values and/or full-text words and phrases to be matched during a search. See also query expression.

search engine

Software that performs metadata and full-text searches. See also search index.

search index

A set of files that contain metadata information and the full-text indexes. The search index is created by the Indexer and is read by the search engine.

search operator

A word or symbol that can be used in a query expression to refine the search criteria (for example, AND, OR, NOT, Substring, or Matches).

search result templates

A way of determining what content item information is listed on a search results page and how that information is displayed.

search results

A list of content items that match specified search criteria.

search results page

Standard Content Server page that displays the results of a query. Also referred to as *query result page*.

Secure

A predefined security group. By default, only the system administrator has access to this security group.

security group

A set of content items to which users are granted permission based on their roles. Each content item is assigned to a security group during check-in. There are two predefined security groups: Public and Secure.

security model

The specific configuration of security groups, roles, and accounts that is defined for an organization.

Select Member applet

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

self-registration

A function that enables users to create their own login credentials (user name and password).

shortcut

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

sort order

The order in which content items are displayed on a search results page. By default, search results can be sorted by release date, title, or score, and each of these options can be displayed in ascending sort order or descending sort order.

status

See revision status.

step

A sequential stage in a workflow that defines which users can review, approve, and reject a revision. There are two types of steps: reviewer step and reviewer/contributor step.

subadministrator

A user who has rights to at least one administration application. See also consumer, contributor, administrator, and system administrator.

subscribe

To indicate that you wish to be notified by e-mail when a new revision of a particular content item is checked in to the Content Server repository.

subscriber

A user who is subscribed to a content item.

subscription

A function that notifies subscribed users by e-mail when a particular content item has been revised. See also criteria subscription, basic subscription, forced subscription, and open subscription.

sub-workflow

A type of workflow that does not have an initial contribution step. A file can enter a sub-workflow only through a jump from a criteria workflow.

sysmanager role

A standard role that gives the user read permission (R) to the Public and Secure security groups, and access to the Admin Server. See also guest role, contributor role, and admin role.

system administrator

A user who has full administrative permission and administration rights to manage the Oracle system.

system locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues on a system-wide basis. See also user locale.

thumbnail

A miniature representation of a page or image. In Content Server, thumbnails are created by the Inbound Refinery and displayed on search result pages.

Thumbnail View

A predefined search result template showing a thumbnail image of each returned content item in a search result list.

thread

A hierarchical group of posts within a discussion. See also discussion.

title

A descriptive name for a content item.

token

A piece of Idoc Script that defines variable users in a workflow.

topic

The subject of a discussion post.

toolbar

The set of navigation links at the top of most Oracle web pages.

Type

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

undo check-out

To cancel a content item check-out without creating a new revision.

unsubscribe

To cancel a subscription to a content item.

update

To modify the metadata for a revision without checking out the content item or adding a revision.

upload applet

An optional Java applet that enables users to check in multiple content items as a single compressed zip file. See also multiple file check-in.

user

A person who has been assigned a user name and password for Content Server.

User Admin

An administration application that is used to manage content server users and security access.

user ID

See user name.

user information

Information about a user, such as the user name, full name, and e-mail address.

user information field

A field that is used to define user information on the User Profile page.

user locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues for an individual user. See also system locale.

user login

A user name and password used to gain access to Content Server.

user name

The name of a user, as recognized by Content Server (for example, `mjohnson`).

User Profile

Personal information about a user, such as the user name, full name, and e-mail address. User information can be changed by an administrator through the User Admin administration application, or by the user on the User Profile page.

user type

See authorization type.

vault

The Content Server directory where native files are stored.

WebDAV (Web-Based Distributed Authoring and Versioning)

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

web folder

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

weblayout

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

Web Layout Editor

An administration application that is used to create the Library hierarchy, define reports, modify search result pages, and update the portal page.

web-viewable file

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

workflow

The process that routes a file for review and approval before it is released to the content server. Users are notified by e-mail when they have a file to review. There are three types of workflows: basic workflow, criteria workflow, and sub-workflow.

Workflow Admin

An administration application that is used to set up and manage workflows.

work in progress

A revision that is in GenWWW status or Done status.

write permission

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

- viewing content
- checking in content
- checking out content
- getting a copy of content.

See also read permission, delete permission, and admin permission.

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