Oracle® Fusion Middleware

Using Oracle WebCenter Content on Mobile Devices

11*g* Release 1 (11.1.1)

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Documentation for Oracle WebCenter Content that describes
how to access content via mobile devices.

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Oracle Fusion Middleware Using Oracle WebCenter Content on Mobile Devices, 11_g_ Release 1 (11.1.1)

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Preface

Using Oracle WebCenter Content on Mobile Devices describes how to access and use documents stored on Oracle WebCenter Content Server through an Apple iPhone, iPad, or Android device.

Topics:

- Audience
- Documentation Accessibility
- Related Documents
- Conventions

Audience

Using Oracle WebCenter Content on Mobile Devices is intended for Oracle WebCenter Content users who want to access documents using a mobile device.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Release 11*g* R1 documentation set.

- *Using Oracle WebCenter Content*

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.

1

Getting Started with Oracle WebCenter Content on Mobile Devices

Oracle WebCenter Content stores documents and manages who can view them. Being able to use a mobile device such as an Apple iPhone, iPad or Android device to view and share documents helps you work where and how you want to stay productive.

Topics:

- About Oracle WebCenter Content on Mobile Devices
- Organizing Documents in Oracle WebCenter Content

See Also:

- Frequently Asked Questions for Oracle WebCenter Content on Mobile Devices
- Troubleshooting Oracle WebCenter Content on Mobile Devices

1.1 About Oracle WebCenter Content on Mobile Devices

Topics:

- What Oracle WebCenter Content Does
- Ways of Working with Oracle WebCenter Content
- Security and Privacy in Oracle WebCenter Content on Mobile Devices

1.1.1 What Oracle WebCenter Content Does

Oracle WebCenter Content stores documents which you can then organize into folders just like on your computer. Documents can be reports, presentations, pictures, and anything else that is an electronic file. When you add a file to Oracle WebCenter Content, the file is uploaded to a repository, called a content server, along with information about the file. The information is used when you or others search for the file. This information is called metadata, or document properties, and in addition to being used when searching for documents, it is used to control who can view the document and in what library or folder the document is stored.

1.1.2 Ways of Working with Oracle WebCenter Content

Your mobile device allows you to find, view, and share content while you are away from your desk. For example, before getting on an airplane you can find the latest employee expense reports and download them to your Apple iPad. Then when you're in the air and not connected to the content server, you can view the reports. When you

land and connect, you can attach the reports to an e-mail and send them on to your boss for approval, or upload them directly to Oracle WebCenter Content as a new document.

In addition to the mobile app, you can use one of the following ways of accessing your files:

- **Web browser interface**: Oracle WebCenter Content provides a web browser user interface for a simple and convenient way of accessing all of Oracle WebCenter Content features. See *Oracle Fusion Middleware Using Oracle WebCenter Content* to learn more about using the web browser user interface.

- **Desktop client**: Oracle WebCenter Content: Desktop provides convenient access to Oracle WebCenter Content servers directly from Microsoft Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), and email clients (Microsoft Outlook and Lotus Notes). See *Oracle Fusion Middleware Using Oracle WebCenter Content: Desktop* to learn more about using the desktop client.

1.1.3 Security and Privacy in Oracle WebCenter Content on Mobile Devices

Oracle WebCenter Content protects your files and has several convenient methods of giving you access when using your mobile device.

Secure Access to Content Server

You must enter a user name and password combination in your mobile app the first time you connect to your content server. This information is passed automatically to the content server each subsequent time you connect. If you sign out from your content server using your mobile application, you will need to enter your user name and password again the next time you connect.

User names and passwords are typically set and managed by a system administrator and are not controlled by you. If you are uncertain what your user name and password are, please ask your system administrator.

Mobile Passcodes on Local Devices

When using Oracle WebCenter Content on a mobile device, you can set a passcode to provide additional security. The passcode is a four-digit number set and managed by you on your mobile device. If you have set a passcode, leaving the mobile application for a specified time requires you to enter the passcode when you return to the application. This helps to protect access if a device is left active where others could use it.

Local File Encryption

Any files downloaded to your device are encrypted and you are unable to access these files outside of the Oracle WebCenter Content app.

Other Security Options

Oracle WebCenter Content has other ways of securing and sharing documents when you connect using something other than your mobile device, such as through a web browser. See the Oracle WebCenter Content documentation for more information.

1.2 Organizing Documents in Oracle WebCenter Content

Oracle WebCenter Content stores and manages documents in a repository. Information about each document is associated with the document and stored as well. This

information, called metadata or document properties, can be used to organize, find, and share documents.

Understanding Document Metadata

Metadata is applied to each content item stored in Oracle WebCenter Content. The metadata is used when you search for a document. Some metadata may be applied manually by the person uploading the document, such as the document title, and some may be applied automatically, such as the date and time a document is uploaded.

Organizing Documents in Libraries

Libraries and folders provide structure and organization to documents, just like folders do on your computer. In Oracle WebCenter Content, a library is just a folder at the top level of the system.

When you first log in to Oracle WebCenter Content on your mobile device, you are shown a listing of all available libraries. There are two types of libraries:

- **Enterprise Libraries**, created by individuals to group content and manage security.

- **System Libraries**, created and managed by Oracle WebCenter Content to organize documents that are in a system process, such as checked-out or expired documents, or documents in a workflow. You cannot upload documents to a system library.

Documents can be uploaded to Oracle WebCenter Content outside of a library context as an unfiled document. However, organizing documents in libraries and folders helps to ensure documents are secure, can be shared, and are easily found by yourself and others. In addition to containing documents and folders, libraries can also contain shortcuts to other libraries, folders, and documents. You only see items to which you have permission. This provides a secure, fast and familiar way to navigate Oracle WebCenter Content.

Organizing Documents in Folders

Folders in Oracle WebCenter Content are used to organize documents so that you can find them quickly by browsing the folder structure. There are two main types of folders in Oracle WebCenter Content:

- Traditional folders, which are similar to folders you use to organize your files on your computer.

- Query folders, or saved searches, which are collections of documents based on search criteria you have saved.

- Retention folders, which is a type of query folder with rules for retaining content.

Traditional folders in Oracle WebCenter Content are like folders on your computer. However, in Oracle WebCenter Content, a folder can automatically assign default folder metadata to the documents organized in them. Having default metadata saves you time, as documents uploaded to a folder are secure and easily found.

Query folders aren't like regular folders, but are saved search criteria that are executed when you tap the query folder. They give you the experience of browsing through a file system while in reality searching for content using metadata. For example, a query folder can be created using the Oracle WebCenter web browser interface on your laptop titled *Today's Documents* that when tapped displays all documents checked in today. The contents change every day without people having to upload documents to

a specific folder, because tapping the folder tells Oracle WebCenter Content to find all documents uploaded on the current day and display them in a list.

Shortcuts

Using the Oracle WebCenter web browser interface on your laptop or desktop, you can create shortcuts to any items you can access in Oracle WebCenter Content, giving you a way to quickly organize how you access items. For example, you may work on several projects, each requiring a specification document, and each specification document is stored in the associated project folder. Using your laptop browser, you can create a folder containing shortcuts to each specification document. So instead of having to search through multiple project folders to find the documents you want, you can tap your folder and have shortcuts to all specification documents listed there for quick, convenient access from your mobile device.

Favorites

Each person's favorites listing is private and always available in the navigation menu. You can easily add to your favorites, and favorites provide a quick and easy way to navigate to those items you use frequently or those items you want to quickly find later.

2

Using the Apple iPad and iPhone Mobile App

The iPhone and iPad mobile app for Oracle WebCenter Content lets you stay connected and productive even when away from your desk. With it, you can view and share documents, spreadsheets, presentations, images, and any other type of file stored in the content server.

Topics:

- Getting Started with the iPad and iPhone App
- Finding Documents
- Viewing Documents
- Downloading Documents
- Uploading Documents
- Creating Folders
- Checking Out Documents
- Editing Documents
- Sharing Documents
- Copying and Moving Items
- Renaming Items
- Deleting Items

See Also:

- Frequently Asked Questions for Oracle WebCenter Content on Mobile Devices
- Troubleshooting Oracle WebCenter Content on Mobile Devices

2.1 Getting Started with the iPad and iPhone App

Topics:

- About the iPad and iPhone Apps
- Installing the iPhone and iPad Apps
- Connecting to an Oracle WebCenter Content Server
- How Things are Organized
- Using the Navigation Menu

■ [Everyday Tasks Using the iPad and iPhone App](#)

2.1.1 About the iPad and iPhone Apps

Have you ever been on a crowded plane and late for a meeting? You need to view a contract but your laptop battery is dead. With Oracle WebCenter Content on your iPad or iPhone, you have access to all your documents no matter where you are. You can view the contract and send notes to your colleague stuck in traffic so you are both better prepared when you get to the meeting. Or download images, text and layouts from your latest ad campaign to view even when you don't have a network connection. With Oracle WebCenter Content on your mobile device, you can work securely where and how you want.

Here are some typical tasks:

■ Access documents stored on an Oracle WebCenter Content server.

■ Search for documents on the server and filter the results to find exactly what you need.

■ View a document on your device.

■ View information about a document or folder.

■ Download a copy of a document and store it on your device so you can view it even when offline.

■ Create a link to a document which can then be shared with others.

■ Email a copy of a document as an attachment.

■ Upload a new document.

2.1.2 Installing the iPhone and iPad Apps

Installing the Oracle WebCenter Content Mobile app is just like installing other apps. Search for Oracle WebCenter Content in the App Store to find the app, then install it. The direct link to the application is
https://itunes.apple.com/us/app/oracle-webcenter-content/id701199944?mt=8

2.1.3 Connecting to an Oracle WebCenter Content Server

When connecting to the Oracle WebCenter Content server, you're asked for your user name and password. The address for the host computer is a website address where the Oracle WebCenter Content server is running. Check with your system administrator for the right address.

If you ever need to change your connection settings, tap the **Settings** icon in the navigation menu then the information icon under the account section and tap **Sign Out**.

Turning the Passcode On or Off

Passcodes are four-digit numbers you create to lock the Oracle WebCenter Content app when you're not using it. For additional security, you can turn on a passcode when you sign in, or add a passcode later by tapping the **Settings** icon in the navigation menu and turning on the passcode lock. If you turn on a passcode, you enter it each time you launch the app, or after a time limit you specify. This is useful if you leave your iPad or iPhone in a public area and want to prevent unauthorized access to Oracle WebCenter Content. Don't worry if you forget the passcode. You can sign out of the app and reset it when you sign back in.

2.1.4 How Things are Organized

Documents in Oracle WebCenter Content can be organized in folders like on other computers. It can help to find documents if you know what folder they're in.

Folders in Oracle WebCenter Content are organized in libraries. For more information about libraries, see Organizing Documents in Libraries.

When you start the application, the main screen displays a list of all libraries in Oracle WebCenter Content Server to which you have access. Tap a library to open it and browse through items and folders.

2.1.5 Using the Navigation Menu

Starting at the left edge and swiping right displays the navigation menu. It has the following links:

- Search
- Browse
- Favorites
- Recently Viewed
- Downloads
- Settings
- About

2.1.6 Everyday Tasks Using the iPad and iPhone App

Using Oracle WebCenter Content on your iPad or iPhone is just like using most other apps:

- **Install the application.**

  Installation of the app can be done using the information provided by your system administrator or through the App Store.

- **Sign in.**

  Enter the user name and password for Oracle WebCenter Content Server. If you're uncertain of the URL for the content server, check with your system administrator.

- **Access libraries, documents and folders.**

  When you sign in, a listing of all libraries available to you is displayed. Browse through the libraries and folders or use the search feature to find items. For more information, see Finding Documents.

- **Mark an item as a favorite.**

  You can set any library, folder, or document as a favorite. Favorite items can be easily accessed using the **Favorites** feature in the navigation menu.

- **Download a document from the server.**

  Downloading a document to your mobile device allows you to view the document when not connected to the content server. For more information, see Downloading Documents.

- **Upload a document to the server.**

Uploading a document makes the document available to others with access to Oracle WebCenter Content. For more information, see Uploading Documents.

- **Share a document with other people or applications.**

  Provide access to a document managed by the content server as an attachment through email or messaging, or as a link to Oracle WebCenter Content. You can also share a document with an application other than the default viewing application on your device. For more information, see Sharing Documents.

2.2 Finding Documents

If you know the library or folder a document is in, you can tap libraries and folders to open them and browse for the document you need.

You can also filter libraries to show only enterprise libraries or only system libraries. See Organizing Documents in Libraries for more information on the types of libraries.

You can search for documents using a search box like on most other apps. Tap **Search** in the navigation menu to display the search box. The search box compares the words you enter to the information about documents in Oracle WebCenter Content. It may also look at the text in the documents if your system administrator has set it up to do so. See Understanding Document Metadata for more about document information.

Working with Favorites

You can make any document, folder, or library a favorite by tapping the **Favorite** icon ☆ on an information page.

Tapping **Favorites** in the navigation menu displays them in a list, which is useful to find documents you use frequently.

Finding Documents in a Workflow

In some cases you might be part of a workflow process where you are assigned to check in, review, or edit a file in a workflow. If so, you are typically notified by e-mail that you have an item in workflow.

Documents in a workflow are part of a system library called **Content In Workflow**. To find a document assigned to you, tap **Browse** in the navigation menu, tap the **System Libraries** tab and then tap the **Content in Workflow** library. A list of documents assigned to you is displayed.

If you want to hide a document from the list of items assigned to you, long-press the item and select it, then tap **Remove**. You can select multiple items to remove from the list.

Tips

If you are assigned a document in a workflow, select **Workflow** from the **More** menu on the property page of the document to see information about the workflow and your responsibilities to it.

Removing an item from the list of documents assigned to you does not remove it from a workflow. You can find any hidden items assigned to you by tapping the **All Workflows** tab. All items currently in a workflow are displayed, whether or not they are assigned to you.

2.3 Viewing Documents

Topics:

- Viewing a Document
- Viewing Information about a Document, Folder, or Library

2.3.1 Viewing a Document

You view a document by either tapping the name or icon in a list, or by tapping the **View** icon on a document information page. Documents you viewed recently are listed when you tap **Recently Viewed** in the navigation menu.

If Apple does not support the type of document you are trying to view, the document information page is displayed. If you believe you have an app on your iPhone or iPad that can open the type of file, tap the **Action** icon and select **Open In** to display a list of apps from which to choose.

2.3.2 Viewing Information about a Document, Folder, or Library

The type of information associated depends on the type of document, folder, or library and how Oracle WebCenter Content is set up. Typically the information includes the document, folder, or library title, what revision a document is, when it was last updated and who updated it. Note that only standard metadata is displayed. Any custom metadata fields added by your company are not displayed.

To view information about a document, folder, or library, tap the **Info** icon in the item listing to display the information page. A summary of metadata is displayed. Additional options are available in the More menu to see the full metadata section, security section, and a workflow information section if applicable.

2.4 Downloading Documents

If you download documents, they are copied from Oracle WebCenter Content Server to your iPad or iPhone. If you know you'll be offline soon (for example, if you're boarding a plane and will set your device to Airplane mode) and you want to edit a file, download that file into your Downloads area. Then you can open the file in another app and edit it even if you're not connected.

Download a document by tapping the **Download** icon when viewing a document information page.

Tap **Downloads** in the navigation menu to show a listing of all documents you have downloaded.

Deleting Downloaded Documents

You can delete downloaded documents from your local device either individually or by clearing all downloads. To delete downloaded documents, tap **Download** on the navigation menu and tap the **Select** icon . If you want to clear all downloaded items, tap **Delete All**. If you want to delete individual items, tap each item to select it and then tap **Delete**.

2.5 Uploading Documents

To upload something, go to the location where you want to store it and tap . Select what you want to add (either a file, a photo, or a video) and follow the instructions. If

you don't have any documents stored, you'll get a message saying there aren't any files available for use.

Some apps may let you upload a file directly through the app. For example, some apps have an **Open In** or **Send** menu option that lets you select a file on your device and open it or send it to Oracle WebCenter Content for storage. When you select to send a document to Oracle WebCenter Content from another application, you are asked to select the library and folder location and enter other pertinent information.

2.6 Creating Folders

You create folders to organize documents you are working on or uploading. To create a folder, go to the location where you want the folder and tap ┼ . Then tap **Create Folder** and enter the folder name. You can't use symbols (like the asterisk) in the name, but you can use spaces and the underscore. Tap **OK** when done.

2.7 Checking Out Documents

You check a document out of Oracle WebCenter Content to prevent others from checking in a new revision until you either check in a new revision or cancel the check out. This is useful if you are planning to make changes to a document offline and won't be able to upload the new revision until after you get back online.

Tap the **Action** icon ⬆ and select **Checkout** when viewing the document or the document properties page to check out a document. When the document is checked out, the menu option changes to **Cancel Checkout**.

2.8 Editing Documents

When online and connected to Oracle WebCenter Content, you can access, edit, and upload documents at any time. If you know you'll be offline soon (for example, if you're boarding a plane and will set your device to Airplane mode) and you want to edit a file, download that file into your Downloads area. Then you can open the file in another app and edit it even if you're not connected.

Here's how you edit documents:

1. Find the document you want to edit, either in your Downloads area or somewhere else on the device.

2. View the document you want to edit or tap ⓘ for the file to open the information page.

3. In the toolbar at the bottom, tap ⬆ .

4. Tap **Open In...** and select the app on your device that you'll use to edit the document.

5. Edit the document as needed.

You can save any edits locally until you are done editing, but saving locally does not upload a revised document to Oracle WebCenter Content. When you are done editing the document, use a menu choice in the app such as **Open In**, **Send**, or another file sharing option to send the file to Oracle WebCenter Content. If you're offline, you can use one of those options after you're reconnected.

2.9 Sharing Documents

You can share documents from your iPad or iPhone in various ways. You can share a link to a document that someone can use with a web browser. You might want to share a link instead of the actual document if the document is very large, or if you aren't sure if the person you're sending it to has rights to see the document. If you send a link, then Oracle WebCenter Content will control the person's access to the document.

You can also send a file to someone by using email or another app that's on your device. You choose how to send it and what message you want to include.

In each case, you tap the **Share** icon ⟨⟩ on an information page and select the option you want.

2.10 Copying and Moving Items

To copy or move a item, including documents or folders, long press an item and select it, then tap the copy icon ▤ or move icon ▤. You can also tap the **Action** icon ↥ and select **Copy** or **Move** when viewing the document or the item properties. Then select the library or folder where you want the item or items moved or copied.

2.11 Renaming Items

To rename a document or folder, tap the document to view it or tap the properties icon ⓘ for the item to view the item properties, then tap the **Action** icon ↥ and select **Rename**.

2.12 Deleting Items

To delete items, including documents and folder, from Oracle WebCenter Content, tap the **Action** icon ↥ and select **Delete** when viewing the document or viewing the item properties, or tap **Delete** after selecting an item in a result list.

3

Using the Android Mobile App

The Android mobile app for Oracle WebCenter Content lets you stay connected and productive even when away from your desk. With it, you can upload, view and share documents, spreadsheets, presentations, images, and any other type of file stored in the content server.

Topics:

- Getting Started with the Android Application
- Finding Documents
- Viewing Documents
- Downloading Documents
- Uploading Documents
- Creating Folders
- Checking Out Documents
- Editing Documents
- Sharing Documents
- Copying and Moving Items
- Renaming Items
- Deleting Items

See Also:

- Frequently Asked Questions for Oracle WebCenter Content on Mobile Devices
- Troubleshooting Oracle WebCenter Content on Mobile Devices

3.1 Getting Started with the Android Application

Topics:

- About the Android Mobile Application
- Installing the Android App
- Connecting to Oracle WebCenter Content
- How Things are Organized
- Using the Navigation Menu

■ Everyday Tasks Using the Android App

3.1.1 About the Android Mobile Application

Have you ever been on a crowded plane and late for a meeting? You need to view a contract but your laptop battery is dead. With Oracle WebCenter Content on your mobile device, you have access to all your documents no matter where you are. You can view the contract and send notes to your colleague stuck in traffic so you are both better prepared when you get to the meeting. Or download images, text and layouts from your latest ad campaign to view even when you don't have a network connection. With Oracle WebCenter Content on your mobile device, you can work securely where and how you want.

Here are some typical tasks:

■ Access documents stored on an Oracle WebCenter Content server.

■ Search for documents on the server and filter the results to find exactly what you need.

■ View a document on your device.

■ View information about a document or folder.

■ Download a copy of a document and store it on your device so you can view it even when offline.

■ Create a link to a document which can then be shared with others.

■ Email a copy of a document as an attachment.

■ Upload a new document.

3.1.2 Installing the Android App

Installing the Oracle WebCenter Content Mobile app is just like installing other apps. Search for Oracle WebCenter Content in the Google Play store to find it, then install it.

3.1.3 Connecting to Oracle WebCenter Content

When connecting to the Oracle WebCenter Content server, you're asked for your user name and password. The address for the host computer is a website address where the Oracle WebCenter Content server is running. Check with your system administrator for the right address.

If you ever need to change your connection settings, tap the **Settings** icon in the navigation menu and sign out, or select **Sign Out** from the menu .

Turning the Passcode On or Off

For additional security, you can turn on a passcode when you sign in, or add a passcode later by tapping the **Settings** icon in the navigation menu and turn on the passcode lock. If you turn on a passcode, you enter it each time you launch the android application, or after a time limit you specify. Passcodes are four-digit numbers you create to lock the Oracle WebCenter Content app when you're not using it. This is useful if you leave your phone or tablet in a public area and want to prevent unauthorized access to Oracle WebCenter Content. Don't worry if you forget the passcode. You can sign out of the app and reset it when you sign back in.

3.1.4 How Things are Organized

Documents in Oracle WebCenter Content can be organized in folders like on other computers. It can help to find documents if you know what folder they're in.

Folders in Oracle WebCenter Content are organized in libraries. For more information about libraries, see Organizing Documents in Libraries.

When you start the application, the main screen displays a list of all libraries in Oracle WebCenter Content Server to which you have access. Tap a library to open it and browse through items and folders.

3.1.5 Using the Navigation Menu

Tapping the icon in the upper left of the display, or starting at the left edge and swiping right displays the navigation menu. It has links to search or browse through libraries or folders, to display a list of favorites you specify, and to list items you have downloaded from Oracle WebCenter Content.

3.1.6 Everyday Tasks Using the Android App

Using Oracle WebCenter Content on your phone or tablet is just like using most other apps:

- **Install the application.**

  Installation of the app can be done using the information provided by your system administrator or through the Google Play store.

- **Sign in.**

  Enter the user name and password for Oracle WebCenter Content Server. If you are uncertain of the URL for the content server, check with your system administrator.

- **Access libraries, files and folders.**

  When you sign in, a listing of all libraries available to you is displayed. Browse through the libraries and folders or use the search feature to find items.

- **Mark an item as a favorite.**

  You can set any library, folder, or document as a favorite. Favorite items can be easily accessed using the **Favorites** feature in the navigation menu.

- **Download a document from the server.**

  Downloading a document to your mobile device allows you to view the document when not connected to the content server.

- **Upload a document to the server.**

  Uploading a document makes the document available to others with access to Oracle WebCenter Content.

- **Share a document with other people or applications.**

  Provide access to a document managed by the content server as an attachment through email or messaging, or as a link to Oracle WebCenter Content. You can also share a document with an application other than the default viewing application on your device.

3.2 Finding Documents

If you know the library or folder a document is in, you can tap libraries and folders to open them and browse for the document you need. A list of directories displays at the top of your screen to help you keep track of the path to the folder you are currently in. You can tap on a folder in the list to quickly jump to that folder.

You can also filter libraries to show all libraries, only enterprise libraries, or only system libraries.

You can search for documents using a search box like on most other apps. Tap **Search** in the navigation menu or tap the **Search** icon 🔍 to display the search box. The search box compares the words you enter to the information about documents in Oracle WebCenter Content. It may also look at the text in the documents if your system administrator has set it up to do so. See Understanding Document Metadata for more about document information.

Working with Favorites

You can make any file, folder, or library a favorite by tapping the **Favorite** icon ☆ on a document properties page.

Tapping **Favorites** in the navigation menu displays all favorite items in a list, which is useful to find documents, folders, or libraries you use frequently.

Finding Documents in a Workflow

In some cases you might be part of a workflow process where you are assigned to check in, review, or edit a file in a workflow. If so, you are typically notified by e-mail that you have an item in workflow.

Documents in a workflow are part of a system library called **Content In Workflow**. To find a document assigned to you, tap **Browse** in the navigation menu, select the **System Libraries** from the filter list in the title bar, and then tap the **Content in Workflow** library. A list of documents assigned to you is displayed.

If you want to hide a document from the list of items assigned to you, tap the item icon or long-press the item to select it and tap the Remove icon ✕ in the title bar. You can select multiple items to remove from the list.

Tips

If you are assigned a document in a workflow, tap the Workflow tab on the property page of the document to see information about the workflow and your responsibilities to it.

Removing an item from the list of documents assigned to you does not remove it from a workflow. You can find any hidden items assigned to you by selecting **All Workflows** from the filter menu. All items currently in a workflow are displayed, whether or not they are assigned to you.

3.3 Viewing Documents

Topics:

- Viewing a Document
- Viewing Information about a Document, Folder, or Library

3.3.1 Viewing a Document

You view a file by tapping the name in a list or by tapping the **View** icon ⊙ on a document properties page. The section Viewing Information about a Document, Folder, or Library has more about document properties.

You have several options to navigate documents with more than one page. You can swipe forward and backward to turn pages, or tap the center of a page to display thumbnails of each page. Tap the thumbnail of the page you want to view to quickly display it. There is also a notification in the title bar showing what page you are viewing within the total number of pages. Tap the numbers to enter the page number you want to display.

3.3.2 Viewing Information about a Document, Folder, or Library

Document properties are metadata associated with a document. The type of information associated depends on the type of document and how Oracle WebCenter Content is set up, but typically it includes the document title, what revision the document is, when it was last updated and who updated it.

To view information about a document, folder, or library, tap the **Info** icon in the item listing ⓘ to display the properties page. Several tabs are available on the properties page to organize the metadata into a summary section, full metadata section, security section, and a workflow information section if applicable.

3.4 Downloading Documents

If you download documents, they are copied from Oracle WebCenter Content Server to your Android phone or tablet. If you know you'll be offline soon (for example, if you're boarding a plane and will set your device to Airplane mode) and you want to edit a file, check out the file and download that file into your Downloads area.

When using older devices, a four digit passcode is required to download documents. If you have not already set a passcode in the security section of Oracle WebCenter Content on your mobile device, then you are prompted to do so when downloading a document.

Tap **Downloads** in the navigation menu to show a listing of all documents you have downloaded.

Note: After you change the screen lock of your device, the file downloads and synchronizations might fail. To resolve this, you must clear all the downloaded or synchronized files and then download the files again.

Documents are also temporarily downloaded when you open them with or send them to a different application on your device, but once the app is closed, temporary downloads are deleted automatically.

Deleting Downloaded Documents

You can delete downloaded documents from your local device either individually or by clearing all downloads. If you want to clear all downloaded items, tap the **Delete** icon 🗑 without selecting any item. If you want to delete individual items, tap the item icon or long-press each item to select it and then tap the **Delete** icon.

3.5 Uploading Documents

To upload a file, go to the location where you want to store it and tap ─┼─. In the file picker, select the files you want to add.

Some apps may let you upload a file directly through the app. For example, some apps have a **Send** menu option that lets you select a file on your device and send it to Oracle WebCenter Content for storage. When you select to send a document to Oracle WebCenter Content from another application, you are asked to select the library and folder location and enter a name for the file.

Tips

- You can upload more than one file at a time to Oracle WebCenter Content if the app you are sending from lets you select multiple files. All selected files go to the same selected library or folder.

3.6 Creating Folders

You create folders to organize documents you are working on or uploading. To create a folder, go to the location where you want the folder and tap ─┼─ . Then tap **Create Folder** and enter the folder name. You can't use symbols (like the asterisk) in the name, but you can use spaces and the underscore. Tap **OK** when done.

3.7 Checking Out Documents

You check a document out of Oracle WebCenter Content to prevent others from checking in a new revision until you either check in a new revision or cancel the check out. This is useful if you are planning to make changes to a document offline and won't be able to upload the new revision until after you get back online.

Check out a document from the document properties page by selecting **Check-out** from the menu ⋮ . The content shows an icon next to the filename to show it's checked out. When the document is checked out, the menu option changes to **Cancel Checkout**.

3.8 Editing Documents

When online and connected to Oracle WebCenter Content, you can access, edit, and upload documents at any time. If you know you'll be offline soon (for example, if you're boarding a plane and will set your device to Airplane mode) and you want to edit a file, check out the file and download that file into your Downloads area. Then you can open the file in another app and edit it even if you're not connected.

Here's how you edit documents:

1. Find the document you want to edit.

2. Tap the document to view it or tap ⓘ near the document name to open the Properties page.

3. Tap ⬈ .

4. Select the app on your device that you'll use to edit the document.

5. Edit the document as needed.

You can save any edits locally until you are done editing, but saving locally does not upload a revised document to Oracle WebCenter Content. When you are done editing the document, use a menu choice in the app such as **Send** or another file sharing

option to send the file to Oracle WebCenter Content. If you're offline, you can use one of those options after you're reconnected.

3.9 Sharing Documents

When viewing a document or a document's properties, you can share it from your Android phone or tablet in various ways. You can send a link to a document that someone can use with a web browser by tapping the **Send** icon and selecting **Share Link** from the menu. You might want to send a link instead of the actual document if the document is very large, or if you aren't sure if the person you are sending it to has rights to see the document. If you send a link, then Oracle WebCenter Content will control the person's access to the document.

Or you can send a copy of the document as an attachment to an email, message, or conversation by tapping the **Send** icon and selecting **Send** from the menu.

In each case, when you tap the icon a list of applications is displayed from which you can choose how to share the link. The link or document is sent to another application on your device and that application then shares the document in whatever manner it can. For example, you can select an application to open an email where you can enter the email address of a person and type a brief note, or a social media application for posting the document to a conversation.

3.10 Copying and Moving Items

To copy or move an item, including documents or folders, tap the copy icon or move icon in the title bar when viewing the document, viewing the item properties, or after selecting one or more items in a result list. Then select the library or folder where you want the item or items moved or copied. To select items in a result list, tap the item icon or long-press the item.

3.11 Renaming Items

To rename a document or folder, tap the document to view it or tap the properties icon to view the item properties. Tap the menu button , select **Rename** and enter the new name.

3.12 Deleting Items

To delete items, including documents or folders, from Oracle WebCenter Content, tap the Delete icon when viewing the document, viewing the item properties, or after selecting it in a result list. To select items in a result list, tap the item icon or long-press the item.

4

Frequently Asked Questions for Oracle WebCenter Content on Mobile Devices

You have questions, we have answers. This section addresses questions typically asked about Oracle WebCenter Content on mobile devices.

Topics:

- Are my files secure?

- Can I change my password?

- What do stars in library, folder, and file listings mean?

- Can I share my files with others?

- Can I share folders or libraries with others?

See Also:

- Troubleshooting Oracle WebCenter Content on Mobile Devices

4.1 Are my files secure?

Yes. Files you access using the Oracle WebCenter application on your phone or tablet are the same files you access when you are in the office. As such, they are protected with enterprise-level security chosen and controlled by your company.

The Oracle WebCenter Content app uses enterprise-level authentication to access the content server, and you can set a passcode on the setting page to lock the app after a specified time to keep others from accessing your files. Any files downloaded to your device are encrypted and you cannot access them outside of the Oracle WebCenter Content app.

4.2 Can I change my password?

Yes, but not from your phone or tablet. Your password is the same one you use when working with Oracle WebCenter Content in the office, and companies have different ways they manage passwords. It's possible that your company has integrated one of the many Oracle WebCenter Content security options with an existing means of managing passwords. Check with your system administrator to find out the process to change your password.

4.3 What do stars in library, folder, and file listings mean?

A star means the file, folder, or library has been marked as a favorite. Tapping **Favorites** in the navigation menu displays them in a list, which is useful to find documents you use frequently.

4.4 Can I share my files with others?

Yes. Using the mobile application on your phone or tablet, you can send files or links to files to other applications, such as email, messaging, or social media, and share it with others. If you attach a file, make sure that the person you are sharing it with is someone who is permitted to view the information in the file. Oracle WebCenter Content can control access to files, but not once they are taken out of the content server. If you are uncertain about a person's permissions to a file, send a link to the file and let Oracle WebCenter Content security control their access. For more information, see Sharing Documents using an iPad or iPhone, or Sharing Documents using an Android device.

4.5 Can I share folders or libraries with others?

Yes. Using the mobile application on your phone or tablet, you can send a link to a folder or library to other applications, such as email, messaging, or social media, and share the link with others. If they have permissions to the linked folder or library, they will be able access it using a web browser. Controlling who has the permissions to folders or libraries in Oracle WebCenter Content can only be done using the security options available when you log in using your supported web browser.

A

Troubleshooting Oracle WebCenter Content on Mobile Devices

This section describes common problems that you might encounter when using Oracle WebCenter Content on a mobile device and explains how to solve them.

Topics:

- Problems Connecting
- Problems Finding Files
- Problems Viewing Files

See Also:

- Frequently Asked Questions for Oracle WebCenter Content on Mobile Devices

A.1 Problems Connecting

Topics:

- I can't sign in to the content server
- I don't remember my passcode

A.1.1 I can't sign in to the content server

You need three things to sign in to Oracle WebCenter Content from your mobile device: your user name, your password, and the address of the computer where the Oracle WebCenter content server is installed. Verify that you have entered your user name and password. Common entry errors are using or forgetting capital letters, putting a dot in the wrong place, or simply mis-typing.

If you've verified that you've used the right user name and password, then check with your system administrator to be sure you have the right address for the content server. Be careful to use the address exactly as your system administrator gives it to you, including any slashes, colons, or port numbers.

WebCenter Content may be protected behind a corporate firewall. Check with your system administrator to see if you need to be connected directly to a corporate wireless network, or if you need to use a virtual private network (VPN) when outside the corporate network.

A.1.2 I don't remember my passcode

If you enable the four-digit passcode but forget what you set it to, tap **Forgot Passcode**. You can then sign out of the app, which will clear your cache and reset your passcode option. When you sign back in, you can choose to enable the passcode option and create a new passcode.

A.2 Problems Finding Files

Topics:

- I downloaded my files but can't find them
- I uploaded a file but can't find the new file on my device
- My coworker uploaded a file to the content server but I can't see it
- I searched for a file I know is there, but WebCenter Content can't find it
- I've browsed through all the libraries and folders, but can't find the file I know is in the content server

A.2.1 I downloaded my files but can't find them

For security reasons, you can only see files you've downloaded from within the Oracle WebCenter Content mobile app. You can't use another app to try to find the files on a file system.

If you downloaded your files using the **Download** icon on a properties page, then they should be displayed when you tap the **Downloads** option in the navigation menu.

A.2.2 I uploaded a file but can't find the new file on my device

Files uploaded to Oracle WebCenter Content typically go through a conversion process so that they are viewable on many different devices. Sometimes exceptionally large files take a while to convert. You can see if the conversion is still in progress using the Work In Progress system library. Tap **Browse** in the navigation menu to see a list of libraries, then filter the libraries to see only system libraries. On iPads and iPhones, system libraries display when you tap the **System Libraries** tab. On Android phones, select **System Libraries** from the **Browse** menu.

It is also possible that when you uploaded the file, you did not select a folder or library to use when uploading. In that case, the file is not in a folder or library, and you won't find it by browsing libraries and folders. Instead, you need to search for the file using the search box.

A.2.3 My coworker uploaded a file to the content server but I can't see it

Check with your coworker or system administrator to make sure you have access to the library or folder where your coworker uploaded the file. It is also possible that your coworker uploaded the file outside of any library or folder and then you wouldn't be able to browse to it. If that is the case, use the search box to find the file.

A.2.4 I searched for a file I know is there, but WebCenter Content can't find it

The search capabilities for Oracle WebCenter Content can be configured by your system administrator. For example, if you are searching for text inside a document but the content server isn't set to do that, then you won't find the file. Or sometimes the content server is set to find an exact match for what you enter in the search box. If you

only enter part of the information, you may not find your file. Try different ways of searching for the file, and if you still can't find it, check with your system administrator to better understand how your content server search capabilities are set up.

A.2.5 I've browsed through all the libraries and folders, but can't find the file I know is in the content server

Oracle WebCenter Content uses libraries and folders to help organize content, but files can still be uploaded outside of any library or folder. If that happens, browsing won't find the file. Try using the search box to find the file.

A.3 Problems Viewing Files

Topics:

- I've tapped on a document on my iPhone and iPad, but the properties page displays

A.3.1 I've tapped on a document on my iPhone and iPad, but the properties page displays

This is probably because your iPhone or iPad doesn't have an app installed to open the type of file you're trying to view. Instead, you'll see the file properties page. You can try tapping the **Action** icon ( ) and selecting **Open In** to display a list of possible apps you can use to view the file.