Oracle® Cloud

Managing Content with Oracle Content and Experience Cloud

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Oracle Cloud Managing Content with Oracle Content and Experience Cloud,

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Preface

This document describes how to use and manage content stored in Oracle Cloud.

Audience

This publication is intended for Oracle Cloud users who want to work with files using a web browser, via the desktop synchronization application, or 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 that have purchased support 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 Resources

For more information, see these Oracle resources:

* Oracle Public Cloud:

  http://cloud.oracle.com
* Getting Started with Oracle Cloud
* Creating Experiences with Oracle Content and Experience Cloud
* Administering Oracle Content and Experience Cloud
* Developing for Oracle Content and Experience Cloud
* What's New for Oracle Content and Experience Cloud
* Integrating Oracle Content and Experience Cloud
* Known Issues with Oracle Content and Experience Cloud

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

Get Started with Managing Content

Oracle Content and Experience Cloud is a cloud-based content hub where you manage your content and digital assets quickly and easily.

- Take a quick tour of Oracle Content and Experience Cloud (English only)
- Oracle Content and Experience Cloud Overview
- Sign Up and Sign In
- Understand Roles
- Manage Your Password
- Download the Apps
- Get Support
- Use Keyboard Shortcuts
- Supported Languages, Devices, and Software
- Service Accessibility
- Icon Quick Reference

Oracle Content and Experience Cloud Overview

Oracle Content and Experience Cloud is a cloud-based content hub that lets you manage your content and digital assets wherever you are, keeping all your files at your fingertips at home, in the office, at the airport, or in a hotel halfway across the world. Easy-to-use collaboration and workflow management help streamline the creation and delivery of your content to improve both customer and employee engagement.

Content is at the heart of all marketing and sales efforts, and with Oracle Content and Experience Cloud you can share, collaborate, process, and manage all your content easily and effectively.

- All you need is a computer, tablet, or smartphone and you're good to go. You can manage your content just like you'd expect, adding, deleting, and moving files as needed. If a pictures needs to be approved before use on a website, you can view it on your desktop or mobile device, approve it, and move it through the design process.
- You can share entire folders with others, or just individual files. Whatever you share, you're in control of who can get to your files and what they can do with them. You can also share websites and collections of digital assets, so others have access to all the content that's needed for a project.
- It's easy to keep your content synchronized between a local computer and the cloud. Install the desktop app on all your desktop or laptop computers and it automatically keeps your files synced across all of them. No more emailing files to yourself or tedious copying to flash drives. If the files are shared and other people use the app, their shared files are automatically updated.

- You can start conversations about files, folders, content items, or assets used in upcoming promotions, letting people post comments about it. People can also add an annotation to a file or digital asset, highlighting a specific point and making a comment about it. Or you can start an independent conversation, letting you and your team members exchange ideas about projects and processes. If you want to add a file to the conversation, just navigate to the file in Oracle Content and Experience Cloud and add it to the conversation.

- Workflows can be set up to funnel content to the appropriate people for approval and revision, eliminating bottlenecks in your process flow. Streamlined process management and content sharing mean more efficiency and less gaps in shared knowledge.

- Websites can be created and reviewed as needed with out-of-the-box templates and themes. You can easily preview what your site looks like on devices with different screen sizes. For an optimal mobile experience, page content is automatically rearranged on smaller screens. Your sites will use the most up-to-date information and assets to produce always-current material.

- You can manage all the assets you need for a website in one place and set up policies governing the use of those assets. Leverage content and data from existing sources to use it effortlessly where it's needed, right now.

- You can easily publish and update your sites and make them available immediately. You can work on one or more updates, preview an update in the site, and then, when you're ready, publish the update with a single click.

- You can create content items, such as articles or blog posts or listings, and publish the items on a website or in a brochure or wherever it's needed. Different layouts mean that the content exists separately from the format, freeing you to update your content as needed without worrying about how it will look or whether it will fit on the page.

Oracle Content and Experience Cloud: it's there where you need it and when you need it so you're always in touch with all your enterprise content.

Data Security

Oracle Content and Experience Cloud uses a multi-layered approach to protect your files in the cloud:

- **User name and password**: You need a user account to access the service. Accounts are set and managed by your service administrator, the person in charge of managing the service for your organization.

- **File encryption**: Your files are protected using Secure Sockets Layer (SSL) technology. Files are encrypted while they're uploaded (in transit) and when they're stored (at rest) in the cloud. That prevents unauthorized use of the files.

- **Access control**: You have total control over who can access your files. You can add co-workers as members of a folder, and you set the access rights for those users when they're added. In addition to sharing folders, you can also share files using links. If you send a link to a member of a folder, that person can sign in and use the file in the service. If you send the link to a non-member, that person is restricted from seeing other files in the folder.

- **Virus scanning**: When you upload files to the cloud, they can be checked by a virus scanner if that option is set by your service administrator. Any files found to be infected are quarantined in the Trash bin and a special icon marks the file as infected.

- **Passcodes on mobile devices**: When accessing your files on a mobile device, you can set a passcode to provide additional security. The passcode is a four-digit number that is set and managed by you on your device and it's used in addition to your user name and password. Any files that you download to your device are encrypted and you can't access those files outside of the Oracle Content and Experience Cloud app unless you specifically download the file for use on the device.

Sign Up and Sign In

Your organization subscribes to Oracle Content and Experience Cloud and the service administrator in your organization adds users so they have access to it. As a user, you then receive a welcome email, which contains the information you need to get started. It contains your credentials (user name, password, and identity domain) and access rights to the service. It also contains the web address (URL) for the service. If you didn't receive the email, contact your service administrator, the person who is in charge of managing your service.

To get started, go to the service URL you were given and enter the account information that was sent to you in a welcome email. Your system may be set up so you sign in using your corporate credentials, or you may have a separate account for the service. All of that should be in the email you received.

If you don't know the URL or your account information or you can't sign in, contact your service administrator for details about your account or your password. The service administrator is the person in charge of managing the service for your organization.

Understand Roles

What you see and what you can do in Oracle Content and Experience Cloud are determined by how resources are shared and what role you're assigned. See the service administrator in your organization for details about the roles as they're used at your organization.

Organization roles determine what tasks a person needs to perform in the organization. *User roles* control what features a person sees when using the service. And *resource roles or permissions* control what a person can do with content items, files, and so on.

Some common **organization roles** include:

- **Anonymous user:** a person engaging with a public website or other digital experience. This user can download documents or make purchases via a digital channel.

- **Visitor**: someone engaging your website, mobile site or other digital experience to learn about the company. Visitors can interact with specific secure sites, make a purchase, and so on.

- **Employee**: a person who shares documents with coworkers and views documents that were shared. They may also collaborate through conversations and create team sites or partner sites from pre-built templates.

- **Content contributor**: a person who writes articles to be published to a channel.

- **Administrators**: *Repository administrators* create and maintain repositories used to store digital assets. *Site administrators* create and manage sites, either enterprise sites or standard sites. *Content administrators* review submitted content and submit content to translation vendors.

- **Developers**: developers create and maintain tools used for websites, such as templates, themes, and style sheets. Those kinds of tasks are described in detail in *Developing for Oracle Content and Experience Cloud*.

User roles include:

- **Administrators**, including a *cloud account administrator*, an *identity domain administrator*, *site administrators*, *content administrators*, *repository administrators*, *storage administrator*, and an *entitlement administrator*.

- **Developers**, including *enterprise developers* and *standard developers*.

- **Users**, including *standard users*, *enterprise users*, and *integration users*.

- **Visitors**

Resource roles include:

- **Viewer**: people who can view content but can't edit or download it.

- **Downloader**: people who can download the associated resource and save it to a personal computer.

- **Contributor**: people who can view, download, and edit the resource.

- **Manager**: people who have full control of a resource.

Complete details about roles and their duties are found in Roles, in *Administering Oracle Content and Experience Cloud*.

Manage Your Password

Your password controls your access to Oracle Content and Experience Cloud and to all other Oracle Cloud services that you're subscribed to. You can change your password in the Cloud Identity Manager.

1. In your browser, go to `http://cloud.oracle.com`.

2. Click **Sign In**.

3. In the My Services section, specify your data center and click **Sign In to My Service**. This information is in the welcome email you received when you were assigned an account. If you're not sure what your data center or identity domain is, contact your service administrator.

4. Enter your name, your password, and your identity domain.

5. Enter your current password in the **Old Password** field and enter a new one in the **New Password** field. Re-enter your password to confirm it.

6. Click **Submit**.

To change your password, click the **Forgot Password** link on the Sign In page. Follow the prompts to enter your identity domain and user name, then answer your challenge questions. Enter then confirm your new password.

Download the Apps

To get the desktop app to use to synchronize your files, click your user name when accessing Oracle Content and Experience Cloud in a browser. Click **Download Apps**. You can download the Windows version or the Mac version.

The mobile apps are available in the appropriate app store (Google Play or Apple iTunes). You can download the apps from the store, or you can access Oracle Content and Experience Cloud through a browser on your mobile device. When you do, you'll be prompted to download the app.

Use Keyboard Shortcuts

The desktop app, Android mobile app, and web browser interface support the standard accessibility features and assistive technologies of the operating system that they run on, such as keyboard shortcuts, voice assistance, and so on. Consult your operating system help for details.

When using a Safari browser, you might need to configure tabbing behavior which might not be set by default. Access your Safari preferences and select **Press Tab to highlight each item on web page**.

When using Firefox with the macOS/OS X operating system, you might need to set tabbing behavior as well. Open your operating system preferences and choose **Keyboard Preferences**. Select the **Shortcuts** tab. In the **Full Keyboard Access** section, set the option to **All Controls**.

To see all keyboard shortcuts in the web client, press the question mark (?). A list of available shortcuts is shown in a dialog.

When you play audio or video in accessibility mode, you can't navigate to the action bar to perform actions such as viewing file properties. You can only access the controls to play or pause the audio or video. To perform other actions on the file, go back to the file listing (using Backspace or Esc), where you can use the keyboard to access file actions.

Global Keyboard Shortcuts

Task	Keyboard Shortcut
Search for content.	/
Close active menu or dialog.	Esc
Expand/collapse navigation panel.	gn
Go to the Flags page	gf

Calendar Keyboard Shortcuts

Task	Keyboard Shortcut
Open the date picker if closed.	Ctrl+Home

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Task	Keyboard Shortcut
Move to previous/next month.	Page Up/Page Down
Move to previous/next year.	Ctrl+Page Up/ Page Down
Move to previous/next day.	Ctrl+Command +Left/Right
Move to the previous/next week.	Ctrl+Command +Up/Down
Move to the current month.	Ctrl+Command +Home
Select the focused date.	Enter
Close without selection.	Escape
Close the calendar, and erase selections.	Ctrl+Command +End

Content Type Editor Keyboard Shortcuts

Task	Keyboard Shortcut
Move focus to previous/next data field.	Up Arrow/Down Arrow
Select a data field to add to content type definition.	Enter
When data field is selected, place it as first item/last item in content type definition.	Alt+Up Arrow/ Down Arrow
When focus is on item in content type definition, move data field up/down in definition list.	Alt+Up Arrow/ Down Arrow

Conversation Keyboard Shortcuts

Task	Keyboard Shortcut
Open selected conversation.	Enter
Move focus into conversation entry.	Shift+Enter
Create a new conversation.	n
Mark all messages in selected conversation as read.	m
Mark or clear selected conversation as favorite.	v
Insert a reference.	Alt+Shift+t to move to the message toolbar; tab to **Insert Reference**.

Message List Keyboard Shortcuts

Task	Keyboard Shortcut
Post a message.	t
Reply to selected message.	r
Edit selected message.	e
Like selected message.	l
Clear flag for you on selected message.	c
Manage flags for selected message.	f
Mark selected message as read.	m
Next message.	j
Find next item (based on selected find criteria).	x
Find previous item (based on selected find criteria).	p

Posting or Replying Keyboard Shortcuts

Task	Keyboard Shortcut
Applies bold style.	Ctrl+b
Applies italic style.	Ctrl+i
Applies underline style.	Ctrl+u
Remove formatting from selected text.	Ctrl+f
Upload document.	Ctrl+d
Send post or reply.	Ctrl+Enter
Clear your message text.	Esc

Adding Annotations Using Keyboard Shortcuts

To add an annotation to an image or file:

1. Preview the file or image to annotate.

2. Navigate to the annotation icon ( ) using the Tab key.

3. Activate the icon using Shift+Enter or Shift+Space. An annotation is placed on the item and a toolbar popup appears.

4. Use the arrow keys to move the annotation and use Shift+Arrow keys to size the annotation square.

5. Navigate to the **OK** button to exit the annotation popup and then add the annotation text using the keyboard.

Supported Languages, Devices, and Software

By default, the web interface language type matches the web browser locale, but you can override that in your user preferences. Click the menu next to your user name and

select **Preferences** then choose your language option. If you change your language setting, that won't take effect until the next time you sign in.

The user interface language for the desktop and mobile apps is set automatically based on the user locale set for the operating system. You can't override this language setting in the apps.

See Supported Software, Devices, Languages, and File Formats in *Administering Content and Experience Cloud* for a complete list.

Service Accessibility

The desktop app, Android mobile app, and web browser interface support the standard accessibility features and assistive technologies of the operating system that they run on, such as keyboard shortcuts, voice assistance, and so on. Consult your operating system help for details.

Keyboard shortcuts are described in detail in Use Keyboard Shortcuts.

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.

Icon Quick Reference

Several different icons are used in the web browser and in the desktop app.

Web Browser, Desktop and Mobile Icons

Here's a quick look at the icons you might see on your home page in your web browser, in the desktop app, or on a mobile device:

Icon	Meaning
	Click to minimize or maximize the left navigation panel.
	A folder that hasn't been shared with anyone.
	A folder that was shared with you or that you shared with others.
	Click or tap to download the item and store it for use on your local computer.
	Click or tap to open the sharing dialog, where you can create a link for a file or folder, or you can add members to a folder.
	Click or tap to mark something as a favorite.
	Shows that a conversation has been started about a file or folder. A conversation is a place where you can share comments with people about a particular item. Click or tap to open the conversation.
	Shows that an item has been reserved by someone and can't be used.
	Click to see menu options that might not fit on the menu bar.

Icon	Meaning
⋮	Click to open the conversation pane to start a conversation or view a conversation that's already started, as well as access a drop-down menu to view custom properties and API information.
⚙	Click to manage custom properties of a file or folder.
☰	Click to change how you view the items on the page, such as in a list or a grid.

Desktop Icons

Here's a look at additional icons you might see when using the desktop app:

Icon	Meaning
(desktop app icon)	The desktop app icon, which appears in your system tray (Windows) or menu bar extras area (Mac).
(green check)	The icon that is superimposed on your files and folders, showing that they've been synchronized successfully.
(blue sync)	The icon superimposed on files and folders, showing that synchronization is in progress.
(orange warning)	Indicates there may be a synchronization problem with a file.
(blue info)	Indicates that additional information is available for a file.

Digital Asset Icons

When using digital assets, the status of an asset is indicated by a circle at the bottom of the asset tile. The different statuses are:

- (blue up arrow) Published
- (green circle) Approved
- (red X) Rejected
- (gray pause) Draft
- (gray circle) Translated
- (yellow minus) In Review

Microsoft Radial Menu

Microsoft Office 2010 or later versions features a quick-access radial menu.

When using Microsoft Office 2010 or later versions, the quick-access radial menu is installed automatically when you install the desktop app. This menu appears whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access Oracle Content features directly

from the file. You can view the properties of a file, work with reservations or share the file, view conversations associated with the file, or open the file in Oracle Content in your web browser.
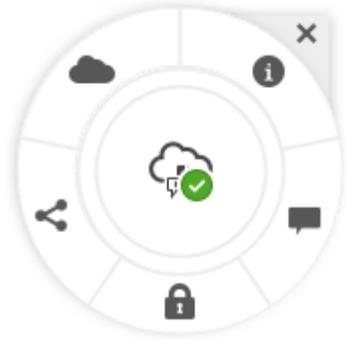
Get Support

Visit our community forum to browse topics and post questions or ideas. Click the **Share Your Feedback** link in the user menu.

If you still need assistance, ask your service administrator (the person in charge of managing Oracle Content and Experience Cloud for your organization) to file a support request at `https://support.oracle.com`.

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Manage Your Files and Folders

What's New in This Release

The Basics

- Quick Overview of Your Browser Documents Page
- Use Your Files and Folders
- Customize Your Profile and Preferences
- View Files or File Details

Work with Files and Folders

- Upload and Download Files
- Search Content and Conversations
- Reserve a File
- Edit a File
- Use Custom Properties

Collaborate with Others

- Share Files and Folders
- Use Conversations
- Use Workflows

Quick Overview of Your Browser Documents Page

Oracle Content and Experience Cloud gives you collaboration and content sharing with just a few clicks of your mouse. Take a minute to learn how and where to find what you need.

Here's what you see on your Documents page when you get started:
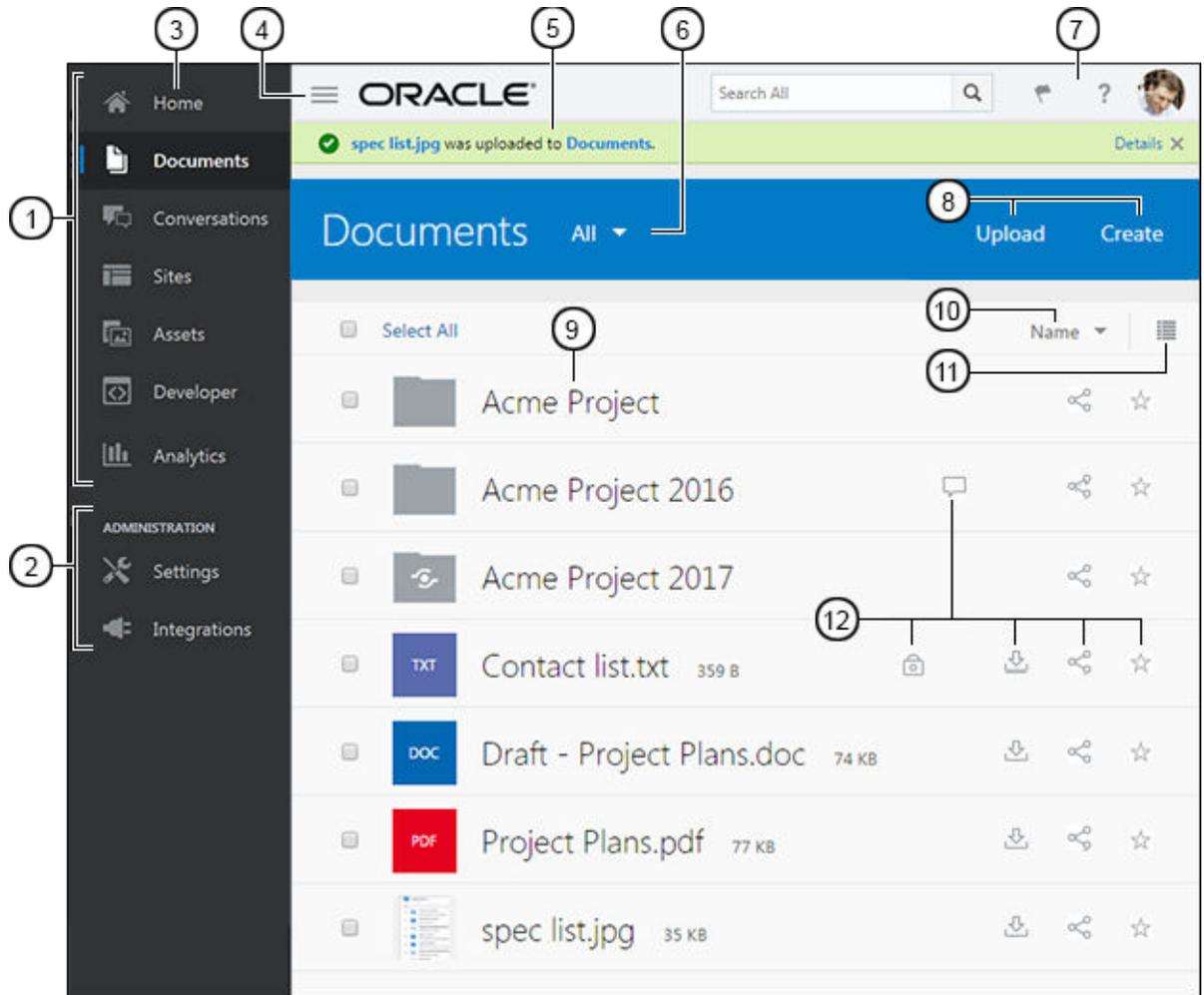
Item	Description
1	The **navigation panel** is where you can switch between features. The options you see on this panel depend on the user role you've been given. For example, only enterprise users will see options for Assets.
2	If you have administrative privileges, you'll see options that let you set up service-wide options. You'll also be able to configure repositories, localization policies, and other features related to digital asset management. See Asset Management Overview for details.
3	Click **Home** to display a page that includes links to recent items, documentation, guided tours, and other helpful links.
4	Click the **Show/Hide** icon to open or close the navigation panel
5	Messages are shown in the **message bar** at the top of your content listing.
6	**Filter** what you see to view only your favorites, just your content, items that are shared with you, or to view what's in your trash folder.
7	The **user area** is where you can change your preferences or find the desktop and mobile apps. Click your user picture to change your defaults. If you have notifications from conversations, the flag will show the number of notifications.
8	**Upload new files** or **create new folders** by clicking the appropriate option.

Item	Description
9	Your **content list** shows the types of files as well as if folders are shared ⟳ or are your own unshared folders ▮.
10	**Sort** your content list by name or by date.
11	Click the **view icon** to display items in a list view, a compact view, or a grid view.
12	Click an **icon** to download it (⤓), share it (⦸), or mark something as a favorite (☆). The conversation icon (💬) shows that there's a conversation started for that item, and the reserved icon (🔒) shows that a file is reserved and locked.

Folders

When you open a folder, you'll see slightly different actions you can perform.

- Click **Share Link** to create a link for the folder.

- Click **Members** to add members to the folder. Note that you can't share your Digital Assets folder.

- Click **Upload** to add new content to the folder.

- Click **Create** to create a subfolder.

- Click ☰ to see additional options for the file or folder.

- Click ⋮ to start a conversation about the folder or item you're viewing. You can also view any conversation that's already in progress.

Conversations

The Conversation page uses most of the same action options you know from your home page. Only the menu choices are different.

- Click the filter button next to the heading to view all conversations, ones you've marked as favorites, closed conversations only, or those that are muted.

- Click **Create** to start a new conversation.

You can sort the conversations by name, or last updated or you can view only those conversations with unread messages. You can also use an expanded or compact view, just like when viewing your documents.

The conversation icons tell you what kind of conversation it is. A conversation about a folder or a file shows a folder or file icon near the conversation. If the conversation was created independently of a file or folder, there is no icon.

Use Your Files and Folders

You can organize and work with any kind of file that's allowed by your service administrator (the person in charge of managing Oracle Content and Experience Cloud).

You can upload and download documents, video files, pictures and graphics—all the files you might need for your projects.

You can also upload templates and other files needed for your websites. This includes the assets, such as pictures or videos, that you might need on your website. Those are managed using the digital asset manager. You can also create content items, which are blocks of content based on a content type created by your administrator.

If your assigned user role doesn't let you do a particular task, or if you can't perform a task for some other reason, the menu option won't be available.

The folder icons on your home page show what kinds of folders they are. A folder with a shared icon ( ) indicates that you shared the folder or someone else has shared a folder with you. A plain folder ( ) indicates one of your personal folders.

To filter what you see, click the menu next to the heading on the home page. You can view all items, shared items, favorites, or items in your Trash folder.

To **sort your file list**, click the sort option (Name or Last Updated) at the top right corner of the file list. Click to select a list view, a compact view, or a grid view of your files and folders.

Your service administrator is in charge of allocating **your storage quota**. To see how much storage space you have:

- In your web browser, click your user name and then click **Preferences**. Select **Documents** from the pulldown menu.

- On your mobile device, tap the **Settings** icon to open your settings information.

You can see the maximum storage space that you've been given and the space you've used so far. Your Trash counts against your user quota. For example, if you have 1 GB of files stored and 1 GB of files in your trash and your overall quota is 5 GB, then you have 3 GB remaining.

If you share a folder and people add files to it, those files count against your quota because it is your folder. If someone shares a folder with you, the content of that folder does not count against your quota. If you need more storage space than you currently have, contact your service administrator.

The following table lists common actions you can do in the service. Depending on how wide your browser window is, you may not see all menu options. If you don't see an option when you select an item, click **More** in the menu bar to see the hidden options.

Task	Description
Create new folders	Browse to where you want to create a new folder or subfolder and click **Create**.

Task	Description
Copy or move files and folders	Select one or more files or folders and choose **Copy** or **Move** on the menu bar or right-click menu.
	If you copy a file or folder to the same location, the copy is renamed with a number added to the name. For example, *Sales Report(2).doc*.
Add an item to Assets	Select one or more files and choose **Add to Assets** from the menu bar or right-click menu.
Tag an item	Select one or more files and choose **Edit Tags** from the menu bar or right-click menu. Tagging an item is similar to adding a keyword for the item, letting you group items later for use or for searching.
Rename files or folders	Select the file or folder to rename and choose **Rename** on the menu bar or right-click menu.
	You can't change a file extension.
Delete files or folders	Select one or more files or folders and choose **Delete** on the menu bar or right-click menu.
	If you delete a file or folder, it's moved to your cloud Trash folder, just like on your local computer. If you change your mind, go to the Trash folder and restore the deleted item.
	To check your Trash, click the **Trash** link on the pulldown menu on your home page. Deleted items stay in the Trash until one of the following events happens:
	• You permanently delete them. • Your Trash quota is reached. • The Trash is automatically cleared out according to the schedule set by your service administrator, the person in charge of managing the service for your organization.
Use an older version of a file	There may be times when you want to work with an older copy of a file, or revert back to a previous version. Select the item in your file list, right-click, and click **Version History** in the menu bar or the right-click menu. When viewing a file, you can click the version number next to the file name to see the version history.
	To make a previous version the current version, click the **Make Current** link for the version you want to use as the current version.
	You can also delete previous versions or download older versions by clicking the **Delete** or **Download** links.
Change folder ownership	You can transfer ownership of a folder to another person. When you do, the folder and its content will be added to the quota of the person assuming new ownership.
	To change owners, select the folder and choose **Properties** from the menu bar or the right-click menu. Click **Change Owner** and select the name of the new owner from the list. Add an optional message to be sent to the new owner or use the default message as given. Click **Done** when finished.

Customize Your Profile and Preferences

To change how defaults are set for your account, click your user picture and then click **Preferences**. Select your preferences from the list.

- **General**: You can change your date format and language.

- **Notifications**: You can change how you'll be notified if you're flagged in a conversation. You can also receive a daily digest of activities.

- **Conversations**: You can change the way messages are managed and change your membership options in conversations.

- **Documents**: You can view your space quota and the notifications you'd like to set when document-specific behavior occurs. You can also specify if you'll allow public links to your files and folders, and what the default role for new public links should be. You can also set the maximum role you'll allow for any public links that are created. Overall sharing rules are set for the entire system by your service administrator, so some of these options may not be available.

- **Linked devices**: This shows any mobile devices or desktop apps that are linked to your account. If you change devices or lose one, you can click **Revoke** and your sign-in session is ended. All local content stored on the device for that account is deleted.

  Revoking access for the device affects only one account, so if you're using multiple accounts, you need to revoke access separately for each account to block all access to Oracle Content and Experience Cloud and delete all local content stored on the device.

- **Applications**: If custom applications were added to your service, information about those applications appears here.

To change your profile information, click your user picture and then click **View Profile** and then **Edit Profile**. You can alter your contact information, enter a description, or define your areas of expertise. Click **Update** to save your changes. The profile information appears on your user "wall". When someone follows you, they can view this profile information.

View Files or File Details

To view a file, like a document or an image, click the file name or thumbnail and the viewer opens.

- Click the plus (+) or minus (-) icons or move the slider bar to make the view bigger or smaller.

- Click the right and left arrows at the top of the preview window to view other files in the folder.

- If the file isn't viewable (for example, if it's a .zip file or a video file), you're prompted to download the file for use. You'll need to have a Downloader role to do that.

- Click **Download** to get a copy of the file. If the file is in a shared folder, you may not be able to upload a new version or download the file, depending on your role. If you can't do it, the option doesn't appear.

- You can use the full screen to view a file. Click **Full Screen** (click ☰ if you don't see that option). Use the arrows in the full screen view to move to other files in the folder. Use the controls at the top of the screen to zoom in or out of the view.

To view details about a file, select the item and choose **Properties** from the right-click menu or menu bar to see details. If the item is a file, you'll see information about the access history and version history for the file. If the item is a folder, you'll see details about who created the folder, as well as sharing information.

Upload and Download Files

Upload

There are several ways to copy your files from your computer to the cloud. File uploading continues in the background, so you can continue to work while files are being added.

- Drag and drop the files from your local computer to your web browser.

- Click **Upload** to add files to the current location.

- Select an unopened folder and choose **Upload to this Folder** from the right-click menu or the menu bar.

- You can also select a file and choose **Upload New Version** from the right-click menu, the menu bar, or the version history dialog.

Keep these things in mind when you're uploading files:

- You can tag files as you upload them by giving them identifying keywords. If you decide later that you want to use that item as a digital asset, you can easily search for the tag and add it to your digital assets collection or folder.

- Try to keep file uploads smaller than 5 GB. Some web browsers can't process files bigger than that.

- To add the contents of an entire folder, you can set up the desktop app. Just add the folder into the sync folder and the content is added to Oracle Content and Experience Cloud for you.

- If someone shared a folder with you, you may not be able to upload a file into that folder or download a file. It depends on the role you were given when the folder was shared. For example, if you have a Viewer role, you can't upload files and the option to upload a file is unavailable.

- Your service administrator may limit the kinds of files you can upload. To see what file types aren't allowed, open your user menu. Click **Preferences** . The Documents section lists any limitations on file types and file sizes (if there are any). Files types are listed according to the file extensions, such as `.mp3` or `.exe`.

- To cancel an upload, click the **Details** link on the information bar at the top of the screen while the file uploads. Click the **X** for the file you want to cancel.

Download

You can download files from the cloud to your local computer in a couple of ways:

- When viewing a file, click **Download** in the file viewer.

- When viewing files in a list, select a file and choose **Download** from the right-click menu or the menu bar. You can also click on the right side of the row.

Search Content and Conversations

Enter a search term, such as a file name, conversation name, digital asset tag, or hashtag, at the top of the screen and press **Enter** or click the Search icon. If you want to search only in a specific folder, open the folder and enter your search term. You can

enter just a few characters of your search term and a list of possible matches is shown, separated by type (documents, conversations, and so on). This lets you quickly find what you need even if you don't know the entire search term.

If you don't have permission to view an item, you won't see it in your search results even if it met your search criteria. After your search results are listed, you can use the results like you would normally. You can add files to folders, add posts to conversations, upload files, or share folders with others.

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.

- If you search for an item that has special characters in the name, the item isn't returned in the suggested search results for documents or folders.

- You can search for multiple terms by separating the terms with a comma or a space.

- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.

- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.

- Searching is case-insensitive. This means that `report` will find the same results as `Report`.

- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:

  - `not` or the dash (-). For example, `Report2013,Report2014 -sales` returns `Report2013` or `Report2014`, but not items with the keyword `sales` in them.

  - `or` or a comma. For example, `Report2013 or Report2014` returns the same results as `Report2013,Report2014`.

  - `and` or a space. For example, `Report2013 and Report2014` returns the same results as `Report2013 Report2014`.

  The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2013 and Report2014 not Report2014` returns nothing because `not` is evaluated first.

- To look for a phrase, use double quotes around the phrase. For example, `"United States"` returns files with the exact phrase `United States` in the file.

- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.

- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.

- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Reserve a File

Reserving a file shows other people that you are working with the file. Select the file you want to reserve and choose **Reserve** from the menu bar or right-click menu.

When viewing a file, click ☰ and then select **Reserve** . The reserved icon (🔒) is added to the file's information line.

Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.

If someone tries to upload a new version of a file you reserved, they'll be informed you reserved it. They can clear the reservation and upload the new version if necessary. If you set your preferences to be notified, you'll get an email when that happens.

Edit a File

You can edit files stored in Oracle Content and Experience Cloud and if you have the desktop app installed, any changes you make to the file will then be synced to any device synced with your account.

To edit a file, select the file from your file list and click **Edit** on the menu bar. You can also view the file then click the **Edit** button. You're prompted to open the file using the desktop app. The file opens with the software installed on your computer to make your edits (for example, Microsoft Word when editing a .doc file).

When you finish editing, save the file as you would do normally. If you're already syncing the file, the latest version is shown in your folder and on your other devices as well. If you didn't sync the file beforehand, the newly synced file is stored in your .download folder in your Oracle Content folder on your desktop.

Use Custom Properties

Custom properties are used to quickly categorize your files and folders with additional descriptions, known as *metadata*.

Your service administrator may have created custom properties that are specific to your organization. For example, perhaps you need to track when an item is approved by other people and who approved it. A custom property called "Document Approval" could be created which lists fields such as file type, the originator of the file, who approved it and when it was approved.

You could then move all files that have been approved into one folder and apply the custom property to the folder. All the files in the folder will be identified as approved. You can edit the custom properties for the different files to show their approval date, who approved it and any other pertinent details.

People with the Owner, Manager, or Contributor role can apply custom properties to files and folders. People with the Viewer or Downloader role can view any properties that are set.

Custom properties are automatically created for items that are stored as digital assets. Only service administrators can create other custom properties. Work with your administrator to develop the properties you need.

To start using custom properties:

1. Open the file or folder you want to use and click ⋮ to open the conversation pane.

2. Select **Custom Properties** from the pane's drop-down menu.

3. Click ⚙ to open a list of custom properties available.

4. Select the name of the custom property you want to use, and then click **Save**.

5. The fields that were created for the custom property are displayed in the side panel. Enter the information as needed. Remember, if this is a custom property for a folder, any information entered will be used for all the files in the folder.

6. Click **Save** when done.

Use Assets

Digital assets are images, documents, and videos that you manage with a special interface. Digital asset management is only available to enterprise users.

"Digital asset management" is a way to group and manage all the assets that are used for one purpose, like in a website or for a particular project. Assets can include graphics or text documents. They're stored in a repository, which is created by content administrators. You can add the files ("assets") to a repository, and the files are managed in your Asset view. You can upload files from your computer, or add files that are already stored in your home directory. You can tag assets, too, by adding a keyword when you add the asset. This makes it easy to find and sort them later.

If you don't see any repositories listed when you click on Assets in the navigation panel, that means that repositories haven't been shared with you. The content administrator must share the repositories with individuals or groups in order for people to use them. If you don't see any repositories listed, contact your content administrator.

Digital assets and repositories are discussed in detail in *Creating Experiences with Oracle Content and Experience Cloud*.

Use Conversations

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Use Conversations.

Share Files and Folders

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Share Files and Folders for more details.

Use Workflows

If Oracle Process Cloud Service is integrated with your service, you can use it to initiate and track workflows and tasks.

To use the folders in Oracle Content and Experience Cloud with a process, you must designate the folder as one that's used with Oracle Process Cloud Service. You must also share the folder with the person who initiated the process.

1. Select the folder.

2. Click **Properties** from the menu bar or the right-click menu.

3. Set **Initiate process on document arrival** to **Yes**.

4. Choose the process name from the list. If the list is empty, see your service administrator, who is in charge of setting up the process workflows.

5. Click **Save**.

The folder and its subfolders are now available for use within the Oracle Process Cloud Service interface. Any files that are changed in the folder or new files uploaded in the folder trigger the process associated with the folder. You can override the inherited process for a subfolder but you can't disable the association with a process.

To learn more, see Getting Started with Oracle Process Cloud Service.

3

Keep Everything Synchronized

The desktop app lets you keep your cloud files and your local files all in sync.

- Desktop App Overview
- Sync Your Files
- Work with Synced Files
- Sync Files in Multiple Accounts
- Set Notifications and Preferences
- Share Files and Folders
- Use Conversations
- Troubleshoot Sync

Desktop App Overview

The Oracle Content and Experience Cloud desktop app keeps files and folders on your computer synchronized with your files and folders in the cloud. Your current files will always be available and if you use more than one computer, you can sync your files to all of them.

It's easy to do. Just install the client software. You set up an account and the software will set up a folder for you on your desktop, with the name you give the folder. You can choose the folders in the cloud that you want to sync, and they're put into that desktop folder to be synced whenever the app starts. This includes your content folders as well as your digital assets.

You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all your folders, it may take some time for the sync process to finish depending on how many folders you have.

You can also directly add files and folders into your desktop folder and they'll be added to your cloud account. The files are available to use in your browser or a mobile device. All your information stays up-to-date while the sync client is running.

If your company has several Oracle Content and Experience Cloud accounts, you may be a member of more than one service. If you are, then you can add up to five accounts to your desktop app.

You can also set notifications, letting you know when the conversations you're active in are changed. You can customize what notifications you'll receive so you can follow only those conversations that are important to you. You can also share your files and folders, just like you do when you use a web browser.

Sync Your Files

After installing the desktop app, connect to Oracle Content and Experience Cloud with your user name, password, and the URL for your service. If you're not sure about any of your sign-in information, talk to your service administrator (the person in charge of running your service).

When you first install the app, you're prompted to choose what folders you want to sync. If you install it and don't go through that process, you can always click ![icon] in the notification area (Windows) or in the menu bar extras area (Mac). Select **Choose Folders to Sync**.

You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all folders, it may take some time for the sync process to finish depending on how many folders you have. You don't have to do anything more. The desktop app is "set and forget" software. It runs until you tell it to stop.

You must have at least a Downloader role in a folder for it to appear in your list of folders for syncing. If you're building websites, you can also sync themes, templates, and other assets associated with your sites. You must have a manager role for those items in order to see them in the list of items available for syncing.

When you initially signed in, a desktop folder was created for you named Oracle Content by default. This is where you can add files and folders you want synced to the cloud. To view the contents in Windows, double-click the folder icon on your desktop or click the icon in the notification area and then click **Go to Oracle Content Folder**. On a Mac, open the context menu for the icon in the menu bar extras area then click **Go to Oracle Content Folder**.

Storage Location

If you have only one account, your synced files are stored in folders in the Oracle Content folder on your computer. If you are a member of multiple services and sync more than one account, then your synced files are stored in a folder that you name when you add each account.

In Windows, the default location for the Oracle Content folder is:

- C:\Users*USER_NAME*\Oracle Content-Accounts

On a Mac, the default location for the Oracle Content folder is:

- /Users/*USER_NAME*/Oracle Content-Accounts

You can change the location of the Oracle Content folder. Select **Preferences** through one of these methods:

- Right-click ![icon] in the notification area (Windows) or in the menu bar extras area (Mac).

- Click ![icon] and then click ![icon].

Select the account folder you want to use. Click **Edit** and then **Change Location**. You can't move the location to an external drive.

Work with Synced Files

You manage many sync tasks using the context menu for the app in the notification area (Windows) or menu bar extras area (Mac). Just right-click to see the options.

Many of these options are also found when you click to open a dialog that shows sync status and other information. Click to access additional menu options. You can also choose **Disable Animations** to stop the automatic updating of information in the dialog.

Task	Description
Sync folders from the cloud	Select **Choose Folders to Sync** and click the checkbox for items to sync. To stop syncing, de-select the item.
Pause sync of all folders	Select **Pause All Sync**.
Investigate sync problems	Choose **Sync Problems**. To view sync problems for a specific folder, right-click the folder in the desktop folder and select **Sync Problems** from the right-click menu.
Go to Oracle Content folder	Select **Go to Oracle Content Folder** and choose the account you want to use.
Open the cloud version of a folder	Select **Open in Oracle Content in a Web Browser**.
Stop all notifications	Select **Disable notifications** to prevent all your notifications from appearing (for example, during a conference call or a webinar). To re-enable them, select **Enable Notifications**.
Change the location or name of an account folder.	Select **Preferences**. Select the account folder you want to use then click **Edit**. Click **Change Location**. It may be useful to put your content on a drive with additional storage space. If you move an account folder to a different drive, you must re-sync all the folders.
Save a log file showing the sync transactions on your desktop	Choose **Troubleshoot** from the Help menu then choose **Save Logs**.

The following options can be accessed by finding the item you want to use in the Oracle Content folder on your desktop, and right-clicking on the file or folder. Select **Oracle Content**, then select the appropriate option.

Task	Description
Open the cloud version of a folder	Select **Open in Oracle Content in the Web** .
Reserve a file	Select **Reserve**. You can also reserve a synced file by opening the file and clicking on the radial menu when editing a Microsoft Office file.
Investigate sync problems	Select **Sync Problems**.

Task	Description
Share a synced file or folder	You can add members to a folder or send a link to a file or folder the same way you do when using a web browser or mobile device. Right-click on the item name in the desktop folder and choose **Members** or **Share Link** in the Oracle Content context area.
See the properties of a folder	Select the file in your Oracle Content folder, then choose **Oracle Content** and then **Properties**.
Rebuild a synced folder	Select **Rebuild Folder**. You may need to do this if the folder has sync problems and no other actions fix them.
Delete the local and cloud copies of a folder	From a top level folder, select **Delete from Cloud** to send the folder to your Trash folder in the cloud.

Most of the time you can let the desktop app do its job and always sync your files. But sometimes you may want to temporarily pause sync or maybe stop it completely.

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).

- Click and then click .

Pausing

You can pause sync if you have a slow connection and need to improve the performance of other online tasks. For example, you may want to pause sync if your connection is slow and the online training video you are viewing is stuttering, or if a download keeps failing.

Access the sync menu using one of the above methods and choose **Pause All Sync**. To resume sync, choose **Resume All Sync**.

When you resume sync, changes you made during the pause are applied, and any conflicting changes in the files need to be fixed.

Stopping

You can also stop syncing a folder completely. Click or right-click and select **Choose Folders to Sync**. De-select the folder or folders that you want to quit syncing.

If you stop syncing a folder on a computer, the folder and its files are removed from the Oracle Content account folder on that computer. Nothing is lost because the folder and its files remain in the cloud and on any other computer you have synced. You can restart sync of the folder later.

Sync Files in Multiple Accounts

You can set up a maximum of 5 separate accounts for each Oracle Content and Experience Cloud account you have.

Select **Preferences** from one of the menus:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).

- Click ⊡ and then click ▪▪▪ .

On the Preferences menu:

1. Click **Add**.

2. Enter the server URL for the account you want to use.

3. Enter the user name and password for the new account.

4. Add an account name. The account name is used for the folder created on your computer that holds the synced files.

After setting up your account, click ⊡ again. Select **Choose Folders to Sync**. You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all folders, it may take some time for the sync process to finish depending on how many folders you have.

Set Notifications and Preferences

You have two ways to access menu options to update your preferences or notifications:

- Right-click ⊡ in the notification area (Windows) or in the menu bar extras area (Mac).

- Click ⊡ and then click ▪▪▪ .

Set preferences

To check and change your preferences, choose **Preferences** from one of the menus. You can adjust the following settings using the Preference screen:

- add a new account

- choose whether to start the app automatically when you sign in on your computer

- show or hide the radial menu that appears when you use Microsoft Office programs such as Word or Excel (Windows only)

Set notifications

You can set what kinds of notifications you'll receive about your conversations. For example, you can be notified by a popup message if someone assigns a Please Reply flag to you in a conversation, or if someone adds you to a new conversation.

To manage notifications about synced content, open the Preferences menu. Select **Receive Activity Notifications**. Click **Choose Notifications** to select the type of notifications you'd like to receive and how you're notified.

You can disable all notifications if needed (for example, during a conference call or a webinar). Select **Disable notifications** from the menu. To start them again, select **Enable notifications**.

Share Files and Folders

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Share Files and Folders for more details.

Use Conversations

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Use Conversations.

4

Work with Microsoft Office

There are a couple of ways to make working with Microsoft Office software easier.

- Microsoft Office Add-On Overview
- Use Oracle Content as a Storage Option
- Use the Radial Menu
- Add Links Using Microsoft Outlook
- Edit Files
- Troubleshoot Microsoft Office Add-On

Microsoft Office Add-On Overview

When you install the desktop app, an add-on for Microsoft Office 2010 or later versions is automatically installed for you. The add-on gives you a radial menu that's available whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access features directly from the Microsoft Office application.

You can easily embed links to your synchronized documents, folders, or most recently used conversations into Outlook email messages. Click the **Insert Link** option and choose what kind of link you'd like to add.

If you install Microsoft Office after you install the desktop app, you'll need to reinstall the desktop app to get this functionality. It's only installed if Microsoft Office is present on your computer.

Use Oracle Content as a Storage Option

If you are using Microsoft Office 2010 or later versions, you can add Oracle Content to the storage location in your backstage area. Open a Microsoft Office program such as Word. Select **Save As** and click **Account**, then click **Add a service**. Select Oracle Content. From that point on, your Oracle Content account appears as a place in the **Open** and **Save As** panels when you use an Office product such as Word or Excel.

Oracle Content also appears as an option under the File tab in Microsoft Office. You can use options such as saving files, collaborate, and more from within Microsoft Office.

Use the Radial Menu

When using Microsoft Office 2010 or later versions on a PC, a quick-access radial menu is installed automatically when you install the desktop app. This menu appears whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access Oracle Content features directly from the file. You can view the properties of a file, work with

reservations or share the file, view conversations associated with the file, or open the file in Oracle Content in your web browser.
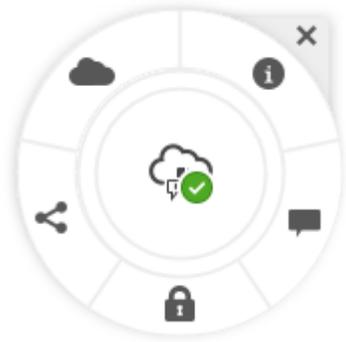
To hide the menu, click the X. To reinstate the menu from a Microsoft Office file, click **File**, then click **Oracle Content** and then **Preferences**. You must have Oracle Content set as a storage location first. See Use Oracle Content as a Storage Option for details.

You can also show or hide the menu by right-clicking on the desktop app icon in your notification area on your computer. Choose **Preferences** and then **Hide Radial Menu** or **Show Radial Menu**.

Add Links Using Microsoft Outlook

When you install the desktop app, an add-in is installed for Microsoft Outlook, letting you easily embed links to your synchronized documents, folders, or conversations into email messages.

1. Make sure your app is running. To verify, check for in the system tray.

2. Open Microsoft Outlook and compose a message.

3. Click **Insert Link** in the message tab of the ribbon.

4. Choose **Document**, **Folder** or **Conversation**, depending on the kind of link you want to insert.

   • If you're adding a link to a document or folder, navigate to the item in your sync folder for the link you want to insert. Select **Member Link** or **Public Link** from the bottom of the screen. If you're adding a public link, you can click the **Link Options** button to change the permissions for the link, the link name, expiration date, or access code.

   • If you're adding a conversation link, choose from the list of your most recently used conversations.

5. Click **Insert**. The name of the conversation, document, or folder is added to your email message as a link.

Edit Files

You can edit files stored in Oracle Content and Experience Cloud and if you have the desktop app installed, any changes you make to the file will then be synced to any device synced with your account. See Edit a File for details.

5

Use the Android Mobile App

You can access your cloud files from anywhere while you're on the go. Just use the mobile app on your Android device to stay in touch wherever you are.

The Basics

- Mobile App Overview
- Sign In or Out
- Access Multiple Oracle Content Accounts
- Set a Passcode
- Manage Notifications

Manage Content

- Use Files and Folders
- View Files or File and Folder Details
- Upload Files and Media
- Edit Files
- Search Content and Conversations
- Sync Files with the Cloud
- Use Assets

Collaborate with Others

- Share Files and Folders
- Use Conversations

Troubleshooting

Troubleshoot Mobile

Mobile App Overview

With the Oracle Content mobile apps, you can stay connected to your files and folders even when you're on the go.

The Android and iOS mobile apps have almost all the same functionality as using Oracle Content in a browser. You can access your content, search and sort your files and folders, share content, and work with conversations.

The mobile apps are available in the appropriate app store (Google Play or Apple App Store). You can download the apps from the store, or you can access Oracle Content and Experience Cloud through a browser on your mobile device. When you do, you'll be prompted to download the app.

Sign In or Out

1. Tap the app icon on your device to open it.

2. Enter the URL of the host server.

3. Enter your account information at the prompts.

4. Tap **Sign in**.

If you don't have an account or can't remember your user name, password, or the server URL, talk to the service administrator in charge of managing your cloud accounts.

To sign out, tap ⚙ then **Sign Out**. You're kept signed in on your device until you sign out. If you don't use the app for a week, you'll need to sign in again.

Set a Passcode

Passcodes are four-digit numbers you set to lock the app when you're not using it.

If you leave your device unattended and don't return within a specified time, you must enter the passcode. This helps to prevent access to the app if your device is left active where others could use it.

1. Tap ⚙ to access your settings.

2. In the **Security** section, tap **Enable Passcode**.

3. Enter the four digits to use as a passcode, then re-enter the digits to confirm. Tap **OK**.

4. Tap **Prompt for Passcode** and choose the amount of time that has to pass before you need to enter the passcode.

   For example, if you choose `After 1 minute`, then you leave the app and return after more than one minute, you have to enter the passcode to use the app again.

To disable the passcode, follow the same steps but tap **Enable Passcode** to switch the passcode off.

To change a passcode, follow the same steps, but choose **Change Passcode**.

Note that when you set a passcode to take effect immediately, if you minimize the app and restore it within 5 seconds, you aren't prompted for the passcode . This is expected behavior for an Android device and not an indication that the passcode hasn't been set correctly.

Access Multiple Oracle Content Accounts

You can use files from multiple accounts and you can easily switch between accounts while using your app. To add an account:

1. Tap ⚙.

2. Tap **Add Account**.

3. Enter a name for the account, your user name, password, and the server information.

4. Tap **Add** when done.

You can add a maximum of 5 different accounts. To switch between accounts, tap the account name at the bottom of the navigation pane.

Manage Notifications

You can customize what kinds of notifications you'll receive when using the app on your device.

1. Tap ⚙ to access your settings.

2. Tap the account name that you want to customize.

3. Tap **Push Notifications** and choose the option you need.

You can customize how your notifications appear on your device by going to the settings for your device and selecting Oracle Content from the list of apps. Then you can choose notification types for the app such as showing messages on the lock screen, in the notification area, and so on.

Use Files and Folders

To create a new folder, go to the location where you want the folder and tap ┼ . Tap the folder icon and then enter a folder name and optional description. You can't use symbols such as / \ ? or * in the name. Tap **OK** when done.

To mark an item as a favorite, tap ☆ . To see a list of your favorites, tap the dropdown menu next to the header on the home page and select **Favorites**.

Many of the other actions you might want to perform, like copying or moving files and folders, can be done by tapping ⋮ or by going to the Properties page. Actions you can perform include the following:

- **View Properties**: tap to view the properties for the item and access other actions you can perform, such a reserving or deleting an item.

- **Open With** (files): lets you choose an app on your device to use for opening a file.

- **Open Folder**: opens the folder so you can see a list of contents.

- **Favorite**: used to mark an item as a favorite. To see a list of your favorites, open the dropdown menu next to the header on the home page. Select **Favorites**.

- **Preview** (files): lets you view a file.

- **Members**: used to share an item with others by adding them as members to the folder.

- **Share Link**: used to create a link to a file or folder that you can share with others.

- **Send** (files): lets you send a copy of a file using an app on your device.

- **Sync** (files): used to keep your file copy synchronized with the copy in the cloud.

- **Reserve/Clear Reservation** (files): used to manage file reservations.

- **Delete**: lets you delete a file or folder.

- **Copy**: used to copy a file or folder to a new location.

- **Move**: used to move a file or folder to a new location.

- **Rename**: used to rename a file or folder.

If you're a member of a shared folder, you may not be able to create a subfolder in the shared folder. You also may not be able to delete or rename a file or folder. It depends on the role you were assigned when you were added to the folder. If you can't perform an action, the action isn't shown.

Tips

Deleting items

- If you want to delete a shared folder or a file in a shared folder, you may not be able to do it if your role doesn't allow it. For example, if you have a Downloader role in a folder, you can't delete files.

- Deleted items are moved to the Trash folder. You can permanently delete or restore the item from there. Items stay in the Trash until one of these events happen:

  – You permanently delete them.

  – Your Trash quota is reached.

  – The Trash is automatically cleared out, according to the interval set by your service administrator, the person in charge of managing the service for your organization.

  – You restore the item from the Trash.

  You can see your Trash folder by going to the home page and tapping the menu under the heading. Tap **Trash** to see what's in the folder.

Copying items

If you copy a file to the original location, it's saved with a number after the file name indicating it's a copy. For example, if you already had a file named *Status Report.doc*, a new copy of it is named *Status Report(2).doc).*

Reserving files

- When you reserve a file, other people will know the file is in use. You can check the properties for the file to see who reserved it and when.

- Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.

- If someone tries to upload a new version of a file you reserved, they can clear the reservation and upload the new version. You'll be notified by email if that happens.

Upload Files and Media

1. Go to the location where you want to add the file.

2. Tap ✛ .

3. Tap ⬆ .

4. Choose a file to upload from your device. You can edit the file name and add an optional description. You can also add a tag while you upload it. Tap **Upload** when done.

You can also **take a photo and upload it**. Just tap ⬛. You can choose any photos you currently have, or take your photo and then upload it.

You can upload files from one Oracle Content account to another. For example, perhaps you have two accounts, User A and User B. If you sign in as User A, select the **Upload File** option. Select Oracle Content as the location you want to choose from and select your User B account. Find the file you want to upload and select a location in your User A account to store it.

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 open it. You can then choose a location for the file and send it to Oracle Content so it's stored in the cloud.

View Files or File and Folder Details

View Files

1. Tap the file name.
2. When viewing a multi-page file, tap anywhere on the screen to see thumbnails of the pages in the file. Tap any thumbnail to view that page. The current page number and the total number of pages is displayed at the top of the screen (for example, 1/33). Tap that designation to jump to a specific page.
3. Press the side arrows to view the previous or next file in the folder.

If you want to use another app to view a file, tap ⋮ and then tap **Open With**. Select the app to use. The listed apps are those installed on your device that can be used to open the file.

View File or Folder Details

You may need to find out when a file was created or who created it. Or maybe you want to see when a folder was last updated and who updated it. Use the Properties page to see information about an item. Tap ⋮ and then tap **View Properties** in your list of files. You can also tap ⓘ when viewing a file.

To see details for a folder, tap ⋮ and then tap **View Properties** for the folder.

Seeing version history

To see the version history of a file while viewing the file, tap ⓘ and then tap **Version History**. You can delete versions or email versions of the file, or make an older file the current version. Tap ⋮ on the version you want to use to select those options.

Edit Files

If you know you'll be offline soon (for example, if you're boarding a plane and using Airplane Mode), sync the file you want to use. Then you can work with it even if you're not connected to the Internet. See Sync Files with the Cloud. It's also a good idea to reserve the file before you edit it. That way other people know the file is in use.

If you have the Microsoft Word app installed and you have a Microsoft Office 365 subscription, you can open a document directly from Oracle Content and edit that document in Word.

1. In Word, tap **Open**.

2. Tap **Browse**. A list of places is shown.

3. Choose the Oracle Content account you want to use from the list.

4. Find the file you want to edit.

5. After editing the file, tap **Save** to save the file back to its original location or tap **Save As** to save it to a new location, either in the same Oracle Content account or a different account or location.

You can also edit files using other apps on your device.

1. Find the file you want to edit. If you're online, you can find files through Browse, Favorites, or Search. When offline, you can choose files you've synced.

2. Tap ⋮ and then tap **Open With**.

3. Select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.

4. Edit the file as needed then tap **Save As** to save the file locally on your device.

5. When you're online, you can upload the local copy of the file back to Oracle Content from within the editing app if it has a **Send** option. Just tap **Send** and select Oracle Content as a location.

Search Content and Conversations

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Any results, if found, appear as you type your search terms.

For example, if you search for the word `report`, you'll find `Status Report 2013.xls` and `Report Logo.jpg`, as well as `Writing Instructions.doc` if the word `report` is in that document or conversation. You can filter your results by type (for example, by conversations or by files).

After your search results are listed, you can use the results like you would normally. You can add files to folders, add posts to conversations, upload files, or share folders with others.

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.

- If you search for an item that has special characters in the name, the item isn't returned in the suggested search results for documents or folders.

- You can search for multiple terms by separating the terms with a comma or a space.

- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.

- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.

- Searching is case-insensitive. This means that `report` will find the same results as `Report`.

- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:

  - `not` or the dash (-). For example, `Report2013,Report2014 -sales` returns `Report2013` or `Report2014`, but not items with the keyword `sales` in them.

  - `or` or a comma. For example, `Report2013 or Report2014` returns the same results as `Report2013,Report2014`.

  - `and` or a space. For example, `Report2013 and Report2014` returns the same results as `Report2013 Report2014`.

  The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2013 and Report2014 not Report2014` returns nothing because `not` is evaluated first.

- To look for a phrase, use double quotes around the phrase. For example, `"United States"` returns files with the exact phrase `United States` in the file.

- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.

- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.

- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Sync Files with the Cloud

Files that you synchronize with Oracle Content are available even if you aren't connected to the Internet.

For example, maybe you're going on a business trip and you want to view or edit the file while offline. By synchronizing the file, you're assured that you can access the file regardless of your connectivity. You control how and when the local copy is kept up to date to ensure you have the latest version.

If you are using an Android version older than 4.3, you first must set a passcode for your device. This protects your downloaded files.

1. Find the file you want to synchronize.

2. Tap ⋮ and then **View Properties**.

3. Tap **Sync**.

To see a list of all synced files, tap the menu under the home page header and tap **Offline**.

To immediately synchronize your selected files:

1. Tap **Offline** in the filter menu under the header.

2. Tap ↻.

The files in the Offline area are updated to match the latest versions in the cloud. You can also tap ⋮ on the Offline screen then choose to unsync all files listed. Or you can tap ⋮ for an individual file and choose **Unsync** from the menu.

You can have your files synchronized automatically:

1. Tap ⚙.

2. Tap the account name with the files you want to keep synchronized, then tap **Synchronization Settings**.

3. Choose how to auto-synchronize and how often.

Share Files and Folders

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Share Files and Folders for more details.

Use Conversations

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Use Conversations.

Use Assets

Assets are those items you want to group together for use on a website or for other projects. They can include graphics, text, video, or other types of files.

Managing assets is a way to group the files you need for one purpose, like in a website or for a particular project. Asset management is discussed in detail in *Creating Experiences with Oracle Content and Experience Cloud*. The following is a brief overview of how you can use assets on your mobile device. Complete details are in the help files provided with the service.

Work with Assets

You can review an asset in workflow to either approve or reject it on your mobile device.

Approve and Reject Assets

In the Home view: tap the Approvals tile. In the list of assets waiting approval, tap an asset to review if needed. If the asset has multiple pages, tap the page number to open a strip of thumbnail images to navigate and view multiple pages. To see a list of asset properties, tap ⓘ.

When you're ready, tap

✓ to approve the asset. Tap ✕ to reject the asset.
You can also quickly approve or reject an asset directly from the approvals list by swiping a list item right to approve, or left to reject.

6

Use the iPhone/iPad Mobile App

You can access your cloud files from anywhere while you're on the go. Just use the mobile app on your iPad or iPhone to stay in touch wherever you are.

The Basics

- Mobile App Overview
- Sign In or Out
- Access Multiple Oracle Cloud Accounts
- Set a Passcode
- Manage Notifications

Manage Content

- Use Files and Folders
- Upload or Download Files or Media
- View Files or File Details
- Edit Files
- Search Content and Conversations
- Use Assets

Collaborate with Others

- Share Files and Folders
- Use Conversations

Troubleshooting

Troubleshoot Mobile

Mobile App Overview

With the Oracle Content mobile apps, you can stay connected to your files and folders even when you're on the go.

The Android and iOS mobile apps have almost all the same functionality as using Oracle Content in a browser. You can access your content, search and sort your files and folders, share content, and work with conversations.

The mobile apps are available in the appropriate app store (Google Play or Apple App Store). You can download the apps from the store, or you can access Oracle Content and Experience Cloud through a browser on your mobile device. When you do, you'll be prompted to download the app.

Sign In or Out

1. Tap the app icon on your device to open it.

2. Enter the URL of the host server.

3. Enter your account information at the prompts.

4. Tap **Sign in**.

If you don't have an account or can't remember your user name, password, or the server URL, talk to the service administrator in charge of managing your cloud accounts.

You're kept signed in on your device until you sign out. If you don't use the app for a week, you'll need to sign in again.

To sign out, tap ⚙ then tap **Sign Out**.

Set a Passcode

Passcodes are four-digit numbers you set to lock the app when you're not using it.

If you leave your device unattended and don't return within a specified time, you must enter the passcode. This helps to prevent access to the app if your device is left active where others could use it.

1. Tap ⚙ to access your settings.

2. In the Security section, tap **Passcode Lock** and then **Turn Passcode On**.

3. Enter the four digits to use as a passcode, then re-enter the digits to confirm.

4. Tap **Require Passcode** and choose the amount of time that has to pass before you need to enter the passcode.

   For example, if you choose `After 1 minute`, then you leave the app and return after more than one minute, you have to enter the passcode to use the app again.

If you have Touch ID or Face ID enabled on your device, you can use it to unlock access to the app. Enable the appropriate options in the Passcode Lock screen after setting the passcode.

To disable the passcode, follow the same steps but tap **Turn Passcode Off** to switch the passcode off.

To change a passcode, follow the same steps, but choose **Change Passcode**.

Access Multiple Oracle Cloud Accounts

You can use files from multiple Oracle Content accounts and you can easily switch between accounts while using your app. To add an account:

1. Tap ⚙ to access your settings.

2. Tap **Add New Account**.

3. Enter a name for the account. Tap **Next**.

4. Enter your user name and password and then tap **Next**.

5. Tap **Connect**. You're now connected to the new account.

You can add a maximum of 5 accounts. To switch between accounts, tap the account names at the bottom of the navigation panel. Tap on an account name from the ones that are shown to switch accounts.

Manage Notifications

You can customize what kinds of notifications you'll receive when using the app on your device.

1. Tap ⚙ to access your settings.

2. Tap the account name that you want to customize.

3. Tap **Push Notifications**. You can elect to turn off all notification or choose specific ones you'd like to receive. For example, you may want to only be notified when someone assigns a Please Reply flag to you or when someone adds you to a conversation.

You can customize how your notifications appear on your device by going to the settings for your device and selecting Content from the list of apps. Then you can choose notification types for the app such as showing messages on the lock screen, in the notification area, and so on.

Use Files and Folders

To create a folder, go to the location and tap ＋ and then tap **Create Folder**. Enter a folder name and optional description. You can't use symbols such as / \ ? or * in the name. Tap **OK** when done.

To mark an item as a favorite, tap ☆. To see a list of your favorites, tap the dropdown menu next to the header on the home page and select **Favorites**.

Many of the actions you need to perform, like copying or moving files and folders, can be done when viewing your file listing or when viewing the properties of a file or a folder. Tap ⋯ and you'll see the actions you can perform.

When looking at your file listing:

• **Go to Conversation**: used to start a conversation about a file or folder.

• **View Properties**: used to open the folder or file property page.

• **Share Link**: used to create a link to the file or folder.

• **Members**: used to add members to the folder.

• **Edit Tags**: used to add a keyword or tag for an item, making it easy to find when you search.

• **Open In**: used to open a file using an app on your device.

• **Send**: lets you send a copy of a file using an app on your device.

When looking at file or folder properties, you can also do the following actions:

- **Rename**: used to rename a file or folder.
- **Reserve/Clear Reservation**: used to manage file reservations.
- **Delete**: lets you delete a file or folder.
- **Copy**: used to copy a file or folder to a new location.
- **Move**: used to move a file or folder to a new location.
- **Go to Conversation**: used to start a conversation about a file or folder.

To manage multiple files, long-press on a file name and select the files you want to manage. Use the options at the bottom of the screen to move, copy, delete or mark as favorites.

Tips

Deleting items

- If you want to delete a shared folder or a file in a shared folder, you may not be able to do it if your role doesn't allow it. For example, if you have a Downloader role in a folder, you can't delete files.
- Deleted items are moved to the Trash folder. You can permanently delete or restore the item from there. Items stay in the Trash until one of these events happen:
  - You permanently delete them.
  - Your Trash quota is reached.
  - The Trash is automatically cleared out, according to the interval set by your service administrator, the person in charge of managing the service for your organization.
  - You restore the item from the Trash.

Copying items

If you copy a file to the original location, it's saved with a number after the file name indicating it's a copy. For example, if you already had a file named *Status Report.doc*, a new copy of it is named *Status Report(2).doc.*

Reserving files

- To reserve a file, long press on the file name then select the file. Tap the reserved icon at the bottom of the screen.
- Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.
- If someone tries to upload a new version of a file you reserved, they can clear the reservation and upload the new version. You'll be notified by email if that happens.

Upload or Download Files or Media

Upload files

1. Go to the location, either a folder or a conversation, where you want the file or photo.

2. Tap ＋ .

3. Tap **Upload Media or Files**.

4. Choose what you want to upload:

   • Tap [image] to upload a photo or take a new photo and upload it.

   • Tap [image] to record a voice message and upload it.

   • Tap [image] to select a file from another location, such as Google Drive or from another Oracle Content account.

5. Select the item you want to upload. You can upload a maximum of 25 items at one time.

6. Edit the name of the item if needed, and enter an optional description.

7. Enter optional tags for the item. A tag is like a keyword, which helps you categorize files. If you upload multiple items, the same tags will be applied to all the files.

8. Tap **Add** or **Post** when done.

You can add photos from your photo gallery to Oracle Content. Open your gallery and select the photos you want to add. Tap [image] and choose Oracle Content as your location. Find the account and folder you want to use and tap **Select** and then tap **Upload**. You can also add tags to the items if you plan to use it as a digital asset.

If you're a member of a shared folder, you may not be able to add files to the shared folder. It depends on the role you were assigned when you were added to the folder. If you can't perform an action, the action isn't available.

You can upload files from one account to another. For example, perhaps you have two Oracle Content accounts, User A and User B. If you sign in as User A, select the **Upload File** option. Select Oracle Content as the location you want to choose from and select your User B account. Find the file you want to upload and select a location in your User A account to store it.

Download files

1. Find the file and open it to view it.

2. Tap [image]. Choose **Save for Offline**.

3. When prompted, choose to download the file.

Downloaded files are encrypted and stored in the Offline area on your device. To see a list of downloaded files, open the dropdown menu next to the header on the home page. Tap **Offline**.

After a file is in your Offline area, you'll be able to use it even if you're not connected to the cloud. If you're traveling, for example, and have to set your device to Airplane Mode, you can still view or edit a file that's stored in the Offline area.

View Files or File Details

Tap a file or photo name to view the item. To view a video or listen to audio, tap the item name then use the controls to start, stop, or skip through the video. You can view video formats such as mp4, .m4v, .mov. The .mp3, .aac, .wav (for iPhone voice

memos), and .mov audio formats are supported. Some .mov formats may not be viewable.

When viewing a multi-page file, thumbnails of the pages in the file are shown at the bottom of the screen. The current page number and the total number of pages is displayed (for example, 1 of 33). Tap that designation to jump to a specific page.

View details

You may need to find out when a file was created or who created it. Or maybe you want to see when a folder was last updated and who updated it.

1. Find the file or folder.

2. Tap ⋯ , then **View Properties**.

Tap the dropdown menu next to the Properties header to see the revision history for a file and the links created for the file. When viewing folder properties, tap the dropdown menu to access the Members screen and the Links screen.

When viewing an item's properties, you can perform many common tasks, such as reserving a file, copying, moving, or renaming it, or viewing members who share the item. Tap ⋯ at the bottom of the Properties page to see the actions you can perform.

Edit Files

If you know you'll be offline soon (for example, if you're boarding a plane and using Airplane Mode), download the file to edit. Then you can work with it even if you're not connected to the Internet. It's also a good idea to reserve the file before you edit it. That way other people know the file is in use.

If you have the Microsoft Word app installed and you have a Microsoft Office 365 subscription, you can open a document directly from Oracle Content and edit that document in Word.

You must enable Oracle Content as a valid location in the iOS Files app before editing a file.

1. In Word, tap **Open** and then tap **More**.

2. Tap **Browse**.

3. In the Locations dialog, turn on Oracle Content.

To edit a file using Microsoft Word:

1. In Word, tap **Open**.

2. Tap **More**, then **Locations**.

3. Choose the Oracle Content account you want to use from the list.

4. Find the file you want to edit.

5. After editing the file, tap **Save** to save it back to its original location or **Save As** to choose another location in Oracle Content.

You can also edit files using other apps on your device.

1. View the file you want to edit or tap ⋯ for the file and then **View Properties**.

2. In the toolbar at the bottom, tap ⌁.

3. Tap **Open In...** and select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.

4. Edit the file as needed.

5. Depending on the app you chose for editing the file, you may need to use a menu choice in the app such as **Open In...**, **Send a Copy**, or another file sharing option such as a Files Location to send the file to Oracle Content. If you're offline, you can use one of those options after you're reconnected.

6. Navigate to the folder where you want to store the file. You can save it in its old location (and create a new version) or you can save it as a new file in a different location.

7. Tap **Upload** to copy the file to Oracle Content.

Search Content and Conversations

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Any results, if found, appear as you type your search terms.

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You can review an asset in workflow to either approve or reject it on your mobile device.

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 to approve the asset. Tap to reject the asset.
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7

Share Files and Folders

You can easily share your files and folders with others, and control who has access and what they can do with the content.

- Take a quick tour of sharing (English only)
- Sharing Overview
- Share Files
- Share Folders
- Stop Sharing
- Check File Access History
- Adjust Link Settings for a Folder
- Recover a Deleted File in a Shared Folder
- Sharing Tips
- Troubleshoot Sharing

Sharing Overview

You may need to collaborate with other people and share information, but you want to make sure only the right people have access to that information. The type of sharing you use depends on what you need to share:

- Files: You can create a link and email the link to someone or use it in an instant message or a document or another app. Sending a link is useful if you need to give access to people on an as-needed basis to specific files. The only way the recipient can access the file is by using the link. There are public links and members links, described below.

- Folders: you can send a link to a folder or you can add people or groups as members to the folder. When you add members to a folder, those people and groups can access all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

If you share folders with other people and give them permission to add content to the folder, that content counts against your storage quota, too. For example, if your folder contains 500 MB of files and after sharing it, other users add another 300 MB of files, then the combined 800 MB counts towards your quota.

Your service administrator is in charge of managing Oracle Content and Experience Cloud for your organization. That person sets the amount of storage you can use. If you need more storage space than you currently have, contact your service administrator.

You decide what people can do with your shared content. When adding members to folders, you determine their role in that folder. You may allow documents to only be

viewed or you may decide people should be able to edit them and upload new versions. The following roles can be used:

- **Viewer**: Viewers can look at files and folders, but can't change things.

- **Downloader**: Downloaders can also download files and save them to their own computer.

- **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

- **Manager**: Managers have all the privileges of the other roles and can add or remove other people as members.

There's also an Owner role with all the permissions to manage a folder, including deleting the folder.

Contributors and Managers can delete content and delete subfolders. If a shared item is deleted, it appears in the Trash folder of the person who owns the item and the person who deleted it.

When collaborating with partners and outside vendors, you can provide secure public links to files so everyone has the right level of access. You can also set access codes and expiration dates on links to add more security. You can also maintain oversight by monitoring who accessed which shared files and when.

Take a quick tour of sharing (English only).

Public Links

This kind of link lets a person use the files in a folder but limits access to any other folders. If you send a public link to a file, the person can access only that one file. Your service administrator can allow or prevent the use of public links for your service and set who can receive those links (anyone or only registered users).

When you create a public link, you add a name to the link so you can track if it was used. You can also add a message with the link and choose permissions for the link. This determines what the recipient can do with the ink. You can adjust the maximum role used for public links in your preferences, accessed through your web browser. Your service administrator may also limit the roles allowed for public links. Roles are the same as those used when adding members to folders (Viewer, Downloader, or Contributor).

When creating a public link, you can choose whether to send the link to **Anyone**, which means you can send it to people who don't have an Oracle Content and Experience Cloud account. Or you can limit the recipients to **All Registered Users**, those people who have an account.

You also can set an optional expiration date when the public link will stop working and an access code. Access codes are like passwords for a public link. You can set an access code and the person who gets the link will need to enter the code before the link can be used. This helps you add an additional measure of security on any public link you send. You'll need to send the access code to the person receiving the link so they can use the link. Otherwise, they will be unable to access the content associated with the link.

Member Links

This kind of link requires a person to be a member of the folder and requires the person to sign in to an Oracle Content and Experience Cloud account in order to use

the link. When you use a member link, you can choose **Online Access**, which lets the recipient view the file or folder. You can also use a **Direct Download** link when sharing a file. This lets the recipient download a file without viewing it.

Share Files

You can share a link to a file, which lets people access only that file and not other files in a folder. And depending on the app you use, you may be able to send a file directly to someone else. For example, when using a mobile device, there's an option to send a file to someone.

Create links

- Browser: select the file and click $\overset{\circ}{\diagdown_{\circ}}$ or **Share Link** on the menu bar. Choose the type of link (member or public). When creating a public link, you can use the defaults or select **Edit Link Options** to set an access code, expiration date, and so on. You can copy the link and use it elsewhere or enter an email address to send the link directly to someone with an optional note about the link.

- Desktop app: select the file in your Oracle Content folder and right-click. You can use the **Copy Link** option in the Oracle Content context section to quickly create a default public link and have it copied to your clipboard for use where you need it. Or you can choose **Share Link** . A dialog opens where you can elect to create a Member link or a Public link or open your email program to send the link in an email message. When creating a public link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy the link you create and use it elsewhere.

- Mobile device: Tap $\vdots$ (Android) or $\cdots$ (iOS). Tap **Share Link**. Tap **Pick Existing Link** to see available links and Member links. When using a member link, you can choose an app to use to download the file or copy the link for use in another app. To create a new public link, enter the necessary details. When done, click **Create** and select the app to use to share the link.

See Sharing Overview for details about Member and Public links.

Share Folders

You can share a folder by sending a link to the folder or by adding members to the folder. Links work the same way for folders as they do for files. When you add a group or a person as a member, they have access to all the content in a folder.

Create folder links

You cannot share a link to a folder with a group. You can only share folder links with individuals.

- Browser: select the folder and click $\overset{\circ}{\diagdown_{\circ}}$ or **Share Link** on the menu bar. Choose the type of link (member or public). When creating a public link, new options appear for you to set an access code, expiration date, and so on. When creating a member link, you can copy the link and use it elsewhere or enter an email address to send the link directly to someone.

- Desktop app: select the folder in your Oracle Content folder and right-click. You can use the **Copy Link** option from the Oracle Content context section to quickly

create a default public link and have it copied to your clipboard for use where you need it. Or you can choose **Share Link**. A dialog opens where you can elect to create a Member link or a Public link or open your email program to send the link in an email message. When creating a public link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy any link you create and use it elsewhere.

- Mobile device: Tap ⋮ (Android) or ··· (iOS). Tap **Share Link**. Tap **Pick Existing Link** to see available links and Member links. To create a new link, enter the necessary details. When done, click **Create** and select the app to use to share the link.

Choose the kind of link you want to use.

Add folder members

- Browser: select the folder and click **Members** on the menu bar. Click **Add Members**.

- Desktop app: select the folder in your Oracle Content folder, right-click, and choose **Members** from the Oracle Content context section.

- Mobile device: tap ⋮ (Android) or ··· (iOS). Tap **Members** or 👤.

Enter the people or groups you want to add and an optional message. Then select the role the members will have in the folder. If you add a group, all group members will have the same role.

Stop Sharing

To remove yourself or one person from a folder, go to the Members menu for the folder.

- In your browser, select the folder and click **Members** on the menu bar.

- When using the desktop app, go to your Oracle Content folder. Right click on the folder you want to use and choose **Members** .

- On your iPad or iPhone, tap ··· . Tap **Members**.

- On your Android device, tap ⋮ . Tap **Members**

Select a name and select **Remove** from the list next to your name or the person's name. If you remove yourself and want to access the folder again, you'll need to ask the folder owner to add you to the folder again.

To stop sharing an entire folder:

- Remove all individuals from the folder or

- Move the *contents* of the folder to a new folder. If you move the folder to a new location, the membership information is moved with the folder.

Adjust Link Settings for a Folder

You can choose to prohibit public links for an individual folder if you need to. You can also change the role that's automatically assigned to people when public links are created.

For example, maybe you chose the default role of Viewer for most of your folders, but for one folder, you'd like a default role of Downloader. This helps you customize link behavior for specific folders.

To set the link behavior, access the Properties for the folder in either the desktop app or your browser. Then click **Sharing** and adjust the values as needed.

Check File Access History

To check the access history of a file, choose **Properties** from the right-click menu or

the menu bar. When viewing a file, click ☰ and then click **Properties**. Click **Access History** to see all activity for that file.

The list there shows you when the file was accessed, how the file was accessed (for example, by using a link) and by whom, and what was done, such as download or view. If a public link was used by someone who's not a member of the folder, the link name is shown.

Recover a Deleted File in a Shared Folder

People with the Manager or Contributor role in a folder you shared can delete files from your folder. If someone deletes a file, you'll find it in your Trash folder. You can select the file in the Trash and then click **Restore**.

Your service administrator (the person in charge of managing Oracle Content and Experience Cloud for your organization) can set how long items are retained in Trash. Your file may be permanently deleted if the Trash is automatically emptied.

Sharing Tips

- If you share a folder, the sharing role applies to subfolders, too, unless you change those rights specifically.

- Your service administrator can allow or prevent the use of public links for your service and set who can receive those links (anyone or only registered users).

- When someone shares a folder with you, you're assigned a role. You may not be able to do some things, like uploading or deleting, because your role may not allow it. If you can't do something, then that menu option isn't available. For example, if you have a Viewer role in a folder, the **Download** option isn't available when using a web browser and the folder isn't available for syncing when using the sync client.

  To check your role, view the list of members in a folder. Your role is listed next to your name.

- You don't have to share a parent folder to share subfolders. For example, you can have a parent folder called *Current Projects*, and in that folder you can have subfolders called *Discount Program*, *Monthly Newsletter*, and so on. You can

share *Discount Program* or *Monthly Newsletter* with people without sharing the *Current Projects* folder.

- The same person can have a different role for each subfolder in an unshared parent folder. For example, you can share *Discount Program* with Leo and assign him the Contributor role for that folder. You can share *Monthly Newsletter* with Leo and assign him the Viewer role for the files in that folder.

- If you share a parent folder that you own, then you can increase rights for the subfolders, but you can't decrease the rights. This means:

  - if the role assigned at the parent folder level is higher than the role assigned at the subfolder level, then the highest role is used for all subfolders.

  - if the role assigned at the parent level is lower than the one assigned at the subfolder, then the subfolder role doesn't change.

8

Use Conversations

You can create conversations to discuss folders and individual files, letting you quickly collaborate with others.

- Take a quick tour about conversations (English only)
- Conversations Overview
- Filter or Sort Conversations
- Start a Conversation
- Add or Remove People in a Conversation
- Add or Remove Files in a Conversation
- Manage Your Conversations
- Add Annotations
- Add Links to Another Conversation
- Use Flags

Conversations Overview

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time.

If you want to discuss a specific document, folder, asset, collection, or site, you can start a conversation about that item. Assets are available for enterprise users and sites are accessible by site administrators. Standard users don't see those navigation options.

When you're viewing an object, you open the conversation pane by clicking ⋮ . By default you see the associated conversation. You can view additional information, such as custom properties, API information, or translations, by selecting an option in the pane's drop-down menu.

When a conversation is started, whether for a file, folder, site, asset, or collection, members of the item can post comments that are visible to all the members. This means an entire team can view and comment about the item. Anyone you add as a member can view a conversation and add posts to the conversation. It doesn't matter what role a person has as a member. If a person can view the contents, the person can view and post to the associated conversation. If you remove someone as a member, they'll also lose access to that conversation.

You can also start an independent conversation about any topic you want. When using your web browser or mobile device, you can start a conversation and add members to it. They can post comments in the conversation and reply to comments from other members. They can also add documents to share with other people in the conversation.

You can also create private conversations or "direct messages." This type of conversation is between you and one other person and no other people can view the contents of the conversation.

You can use hashtags (#) to add keywords to your conversations. A hashtag in a message designates a meaningful term or topic so it's easy to group all content associated with that term or topic. You can reply to, edit, delete, and restore any comments you make. You can "like" any post or mark posts as un-read or read and you can flag comments to catch someone's attention.

When a conversation is started about a file, folder, site, or asset, ⬜ appears with the item, showing you that a conversation is active for that item.

Take a quick tour about conversations (English only).

Filter or Sort Conversations

In your web browser

Click **Conversations**. To filter your conversations, choose what you want to see from the dropdown list at the top. For example, you may only want to see muted conversations, or those conversations that are closed.

To sort your list, choose an option from the menu in the top right corner of the screen. You can sort the list based on update time, name, or by those conversations with unread messages.

On a Mobile Device

Tap **Conversations** in the navigation panel. To filter your conversations, choose what you want to see from the dropdown list at the top. For example, you may only want to see muted conversations, or those that are marked as favorites.

To sort your list, tap the Sort icon in the top corner of the screen and select the sorting option you'd like to use.

Start a Conversation

In your web browser

You can start a conversation that's associated with a digital asset, file, or folder, or you can start an independent conversation.

To start a conversation about an asset, a file, or a folder:

1. Open the item you want to use.

2. Click ⠿ .

3. Start the conversation by posting a message in the conversation pane.

To start a private conversation with someone, click on the person's picture in a conversation. Click **One-on-One** to start a conversation with that person.

To start an independent conversation to collaborate with others:

1. Click from the navigation sidebar.

2. Click **Create** and enter the conversation name.

To add a post to a conversation, type your comment in the conversation pane and click **Post**.

On an Android device

To start a conversation about a file or folder:

1. Find the file or folder you want to use for a conversation.

2. Tap .

3. Tap **Go to Conversation**. A conversation is started for you.

4. To add members to the conversation, you need to add members to the folder or the folder where the file is stored. Open the conversation and tap and then tap **Members**. Tap **View Folder Members** and add people to the folder as needed.

To start a conversation that's independent of any file or folder:

1. Tap **Conversations** in the navigation panel.

2. Tap .

3. Add the conversation name.

4. Tap **OK**.

5. To add members to the conversation, open the conversation and tap and tap **Members**. Tap to select people to add to the conversation.

If the conversation was started about a folder, you'll need to add people as members to the folder. You can't add them through the conversation.

To start a private conversation, just tap the picture of any person either in a conversation or from your People page. Add a post and a private conversation is started with that person.

To add content to a conversation, tap to add a post, upload a file from your device, add a photo, or add a file that's already in Oracle Content.

On an iPhone or iPad

To create a conversation about a specific file or folder:

1. Find the file or folder you want to use for a conversation.

2. Tap .

3. Tap **Go to Conversation**. A conversation is started for you.

To create a conversation that's independent of a file or folder:

1. Tap **Conversations** in the navigation panel.

2. Tap .

3. Add the conversation name.

4. Tap **Create**.

To add members to conversations:

1. Open the conversation and tap ![icon].

2. Tap ![icon].

3. Start typing the name of the person to add. A list of names matching the letters you entered is shown. Select the people from the list, then tap **Add**.

If the conversation was started about a folder, you'll need to add people as members to the folder. You can't add them through the conversation.

To add a post to the conversation, open the conversation and tap ![icon]. Add your message then tap **Post**.

Using the desktop app

In your Oracle Content desktop folder, right-click on the file or folder you want to use for a conversation. Choose **Oracle Content** and then **Conversation**. Enter a post to get the conversation started.

You can also start a conversation by clicking ![icon] on the radial menu when using an Office file.

Add or Remove People in a Conversation

To add people to a conversation about a file or folder, add the person as a member to the folder or the folder where the file is stored. After a person is added as a member, they'll be able to access the conversation.

When working with independent conversations (not one created about a document or folder), you can add people directly to the conversation. When you add someone to a conversation, they're given management rights to that conversation. This means they can add other members, rename the conversation, or even close the conversation.

You can see a person's activity status in the conversation where the person is a member. The colored circle around a person's picture indicates the person's status:

• A full green circle around the picture shows that the person is signed in and currently using their account.

• A three-quarter yellow circle around the picture shows that the person is signed in but not currently using their account.

• A half gray circle around the person's picture shows that the person is offline and not signed in.

When viewing status in your browser, an animated pencil icon in the lower right corner of a picture shows that the person is entering content in the current conversation.

Web Browser

To add people to an independent conversation in your web browser:

1. Open the conversation.

2. Click ┼ .

3. In the Share dialog, click **Add Members**. Begin entering the name or email address of the people to add. Select names from the list then click **Add**.

A quick way to remove a person from a conversation (including yourself) is to click the person's picture in the membership bar, then select **Remove from Conversation**. You can also click ┼ and click **Remove** under the name of the person you want to remove.

To remove someone from a conversation created in a file or folder, you need to remove them as a member from the folder where the file is stored. That revokes their access to both the file and its conversation.

iPhone/iPad

To add someone from within a conversation, tap . Tap . Enter a name or part of a name in the search bar. Select the person from the list and tap **Done**.

To remove someone from the conversation, tap next to the person's name. Tap **Remove Member**.

Android devices

Open the conversation and tap and then tap **Members**. To add new members, tap . Enter a name or part of a name in the search bar. Select the person from the list and tap **Add**. To remove someone from the conversation, tap their picture, then tap **Remove from Conversation**.

Add or Remove Files in a Conversation

You can add files to an independent conversation as attachments to messages or as individual items without a message. There are no restrictions on the types of file you can add. File previews are limited to the first 100 pages and not all file types can show a preview.

In a web browser

1. Open the conversation where you want to add a file.

2. Click .

3. Select where the file is stored, either on your computer or already stored in Oracle Content and Experience Cloud. Navigate to the file, select it, then click **Post**.

4. You can add a message with the file, or just click **Post** to add the file by itself.

On your iPhone or iPad

1. Open the conversation on your iPhone or iPad.

2. Tap ┼ .

3. Tap **Choose from Folder** to add a file from your Oracle Content account. Tap **Upload Media or Files** to:

   • Choose a photo or video from items stored on your device.

   • Record a voice message to add to the conversation.

   • Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in Oracle Content.

4. Tap **Edit** to change the name or add an optional description.

5. Tap **Post**.

On your Android device

1. Open the conversation where you'll add the document.

2. Tap ┼.

3. Choose what you'll add to the conversation.

   • Choose a photo or video from ones on your device.

   • Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in your account.

   • Choose a file already in Oracle Content. Navigate to the location where the file is stored and select the file.

4. Choose the location in Oracle Content where you want to store the item.

5. Tap ⁝ and then tap **Edit** to change the name or add an optional description.

6. Tap **Done**.

Manage Your Conversations

You can manage actions for your conversation from the conversation management menu. Just click or tap ☰ to access the menu where you'll see the following options:

• **Mark All Read:** You can mark all the posts in the conversation as read. The "read" count appears in the conversation listing.

• **Favorite**: Add the conversation or remove it from your list of favorites.

• **Share**: Share the conversation by adding members to it or by sending a link to the conversation.

• **Upload Document**: Add a document to the conversation.

• **Rename**: Change the name of the conversation.

• **Mute** or **Unmute**: Muting a conversation hides it from your list of conversations and stops messages about it from appearing in your email digest if you chose to have one sent to you.

• **Close** or **Open**: Closing a conversation prevents people from adding new messages to it and removes it from people's list of conversations.

- **Show** or **Hide** membership messages: These types of messages show when a person was added to a conversation and who added them.

- **Change language**: You can adjust the language setting for individual conversations by choosing a language from the list.

- **Discard**: You can discard a conversation that was created independently of a file or folder. When you discard it, the conversation is removed from the listing of conversations for yourself and any members.

Add Annotations

You can use annotations to add comments about a specific part of a file or asset when you view it in your web browser. For example, if a colleague uploads a presentation, you can scroll through the presentation and add a comment on page 2, page 7, and page 10, discussing aspects of the presentation. Or if someone adds a photo to a collection that's being used for one of your projects, you can create a conversation and add annotations about that photo before it's used. Collections and digital assets are available to enterprise users. Standard users won't see those options in their navigation panel.

Your annotation appears in the conversation pane as a post. If you add an annotation to the file named Upcoming Project Details.pptx, for example, your annotation appears in the conversation pane as a post with *via Upcoming Project Details.pptx* underneath the date and time of the annotation.

Anyone who is a member of the folder where the file is stored or a member of the collection where it's used can view the annotations on files. It doesn't matter what role a person has as a member of the folder. In order to add an annotation, a person must have a Downloader, Contributor, or Manager role.

When you add an annotation to an asset, that annotation only appears in the context of the repository where the asset is stored. For example, suppose you have a photo of a bicycle in the *Cyclist* collection. The photo is actually stored in your Bicycle folder, but it's being used in the repository. If you add an annotation to the photo in the *Cyclist* repository, the annotation does not appear in your Bicycle folder.

1. View the file where you want to add a comment.

2. Click ⊤ .

   - To highlight text and leave a comment about the highlighted area, hold down the right-button and drag your cursor to select an area. Release the button and add your comment in the Conversation pane.

   - To insert a comment at a spot in the file, go to the area where you want to add a comment. Click at the spot then add your comment in the Conversation pane.

3. Click **Post** to save your annotation.

After you add an annotation to a file, a conversation is started for the file so others can add comments, too.

Add Links to Another Conversation

While writing a post to a conversation, you may find it handy to link to another conversation.

1. Open the conversation where you'll post your message. It can be an independent conversation or one created for a document or folder.

2. Enter your text in the message box. When using a browser, formatting options are available under the text box.

3. Click or tap [icon] .

4. Search for a conversation or choose one from the Recent list. A link to that conversation is added to the body of your message.

5. Click **Post** or press Enter, depending on how you set up your preferences.

Use Flags

Flags are a way to bring an item, like a message or a file, to someone's attention. Depending on the priority you assign, you can capture people's attention quickly.

To assign a flag, view the items in a conversation and click or tap the flag icon to the right of the item. Next, select the person to be flagged and the priority level. You can assign a different flag priority to each person.

Flag	Meaning
[flag icon]	For Your Information: look at this when you have time.
[flag icon]	Please Reply: look at this, and let me know what you think.
[flag icon]	Please Reply Urgent: look at this as soon as you can and let me know what you think. An email notification is always sent for Please Reply Urgent flags.

• Flags assigned to you are red. Flags assigned to others are blue.

• You can see your total flag count in the header, next to the search field. Click or tap the count icon to quickly see the flags assigned to you.

• On the Flag screen, click or tap the menus in the header bar to filter what you see.

• To clear a flag, go to the flagged message and click or tap the flag icon. Click **Clear** or tap the **X**. The person who set the flag may get an email, depending on what they've set up through their notifications.

To ensure flags **say look at this now!**, use them thoughtfully. A flood of flag notifications all at once or all the time reduces the impact.

9

Use Groups and Follow People

You can set up groups of people, making it easy to share with several people at one time. You can also follow individuals, checking to see if someone is online or not or you can send direct messages to people to catch their attention.

Use Groups

- Take a quick tour about groups (English only)
- Groups Overview
- Create or Delete a Group
- Add People to a Group
- Join or Leave a Group

Follow People

- Follow People
- See Who's Online
- Send Direct Messages

Groups Overview

Groups can help you communicate and coordinate with several people at one time.

Take a quick tour about groups (English only).

A group can be added to a conversation, so you can quickly start a collaboration with several people. Or you can add a group as a member to a folder, letting you quickly share the contents of that folder with others. Content types can also be shared with groups, the same way they're shared with individuals. The only things you can't share with a group are collections and public or member links.

You can create your own groups, or groups may have already been created for your organization by your service administrator.

Here are some tips to keep in mind when creating and using groups:

- **Don't duplicate groups**. Use the **Find Public Groups** option on the Group menu to see if a group already exists that might be useful for your purpose.

- **Use a meaningful name**. Don't use acronyms or abbreviations for your group name. Make it meaningful so people will understand its purpose.

- **Choose the right privacy control for your group**. You can control who can see or use the group, and you can control if someone can add themselves to a group. There are three kinds of groups:

  - **Public group**. A public group is visible to anyone and anyone can add themselves to the group. You should use this kind of group sparingly. For example, you may have a rollout of a project and you'd like to gather feedback

from anyone who used the project. You can open up a group to everyone and let people add themselves so they can add feedback about that specific project.

– **Private group**. A private group is one that can be seen by everyone but people can't add themselves to the group. This can be useful when you want to limit a group to a subset of people. People could discover the group exists and use the group to share information with those people. For example, you can create a group for the Engineering department. Anyone who needs to collaborate or share with that department can add that group as a member to a conversation or folder.

– **Closed group**. This type of group gives you the tightest control on membership. No one will be able to see the group unless they're already a member and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming acquisition or project. No one else in the organization needs to know about this, so by creating a group for restricted members, you control who can see the information.

• You can add a group as a member to a conversation, content type, or folder. If you add someone to a group or remove someone from a group, they will be added or removed from the conversation, content type, or folder. If an individual was added as an individual but not as part of a group, they remain a member unless removed as an individual.

• If a group is deleted, access to any shared folder, content type or conversation is removed from the people in that group.

• You can use groups on your mobile device and with the desktop app, but you manage groups using the web browser interface.

To use a group, select it just like you'd select a person to share with. For example, when sharing a folder or conversation, type the name of a group in the Members dialog. Choose the permissions (View, Contributor, and so on) for the individuals in the group then add the group as a member to the folder or conversation.

Create or Delete a Group

Groups let you quickly share content and collaborate with several other people at one time.

Groups are managed using your web browser interface. You can use groups on your mobile device and with the desktop app (add them as members to folders and conversations and so on) but you can't create, delete, join, or leave groups using a mobile device.

Create a Group

1. Click your user picture to open the user menu and then click **Groups**. Choose **Find Public Groups** from the menu at the top of the Group page. If you don't find a group you can use, select **Create Group**.

2. Create a meaningful name for the group. Don't use abbreviations or acronyms that might be confusing. Use a name that will tell people the purpose of your group.

3. Choose the privacy settings you want to use. You can make the group visible to everyone, you can have the group be private or you can make the group visible only to members.

- **Public group**. A public group is visible to anyone and anyone can add themselves to the group. You should use this kind of group sparingly. For example, you may have a rollout of a project and you'd like to gather feedback from anyone who used the project. You can open up a group to everyone and let people add themselves so they can add feedback about that specific project.

- **Private group**. A private group is one that can be seen by everyone but people can't add themselves to the group. This can be useful when you want to limit a group to a subset of people. People could discover the group exists and use the group to share information with those people. For example, you can create a group for the Engineering department. Anyone who needs to collaborate or share with that department can add that group as a member to a conversation or folder.

- **Closed group**. This type of group gives you the tightest control on membership. No one will be able to see the group unless they're already a member and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming acquisition or project. No one else in the organization needs to know about this, so by creating a group for restricted members, you control who can see the information.

4. Click **Done** when finished.

5. Add members as needed. Click **Add Members** and search for people to add. Select the role you want the person to have then click **Add**.

To edit your group's settings, click ⬛⬛⬛ next to the group name. You'll see options to edit the group, add members, or delete the group.

Delete a Group

To delete a group, open the group and select the menu for the group (⬛⬛⬛). Select **Delete**.

Know that if you shared a folder, a content type, or a conversation with the group you deleted, the shared object is now unavailable to the group members. If you shared something with an individual who was also in a deleted group, that individual will still have access to the object.

Add People to a Group

If you own a group or if you have a manager role in a group, you can add people as members to the group.

Groups are managed using your web browser interface. You can use groups on your mobile device (add them as members to folders and conversations and so on) but you can't add people to groups using a mobile device.

To add someone to a group, click **Groups** in your user menu. Open the group or click

⬛⬛⬛ for the group. Click **Add Members**.

You can add individuals or you can add other groups. If you add a group and a person is in that group, you won't be able to add the person as an individual.

When you add an individual as a member of a group, you assign permissions to them, either as a manager or a member of the group. If you add a group as a member, the permission you assign to the group applies to everyone in that group.

Join or Leave a Group

You can join public groups if the membership is open or you may be added to other groups by the group manager.

Groups are managed using your web browser interface. You can use groups on your mobile device (add them as members to folders and conversations and so on) but you can't create, delete, join, or leave groups using a mobile device.

Join a Group

To join a group, click **Groups** in your user menu. Choose **Find Public Groups** from the menu at the top of the Group page. Choose the group you want to join and click

. If the membership is open, you can select **Join Group**.

You may already be in a group without joining it. People can create groups and add you to them. The group name appears in your list of groups. If you're in a group and information was shared with the group (for example, if the group was added as a member to folder), that shared item appears in your list of conversations, folders, and content items.

Leave a Group

To leave a group, open the group and select the menu next to your name (   ). Select **Leave Group**. If a conversation, folder, or content item was shared with that group, you'll lose access to those things immediately.

Follow People

When you follow someone, they're added to your People list, making it easy for you to see if they're online or active.

In your web browser or iPhone or iPad

To follow someone who's a member of a conversation, select the person's picture from the membership bar and then select **Follow**. You can also follow people by clicking on their picture anywhere else you see it, and go to the person's profile page. Select **Follow**.

To stop following people, choose **Unfollow** from the menu.

On an Android device

To follow someone in a conversation, open the conversation and then tap the Members/Messages menu at the top of the screen. Tap **Members**. Find the person to follow and tap ⋮ . Tap **Follow**. You can also follow people by tapping on their picture anywhere else you see it, and go to the person's profile page. Select **Follow**.

To stop following people, choose **Unfollow** from the menu.

See Who's Online

You can see a person's activity status in the conversation where the person is a member. The colored circle around a person's picture indicates the person's status:

- A full green circle around the picture shows that the person is signed in and currently using their account.

- A three-quarter yellow circle around the picture shows that the person is signed in but not currently using their account.

- A half gray circle around the person's picture shows that the person is offline and not signed in.

When viewing status in your browser, an animated pencil icon in the lower right corner of a picture shows that the person is entering content in the current conversation.

Send Direct Messages

You can send a message to someone by clicking that person's picture. The profile page for the person is displayed. Click **one-on-one** to send a message and start a private conversation with that person. On a mobile device, just tap the picture of the person and a private conversation is started with that person.

10

Troubleshoot

Here's where you'll find some answers to a few frequently asked questions.

General

- I can't sign in
- I can't move or copy a file
- I don't see digital assets or content items
- I can't upload or download a file
- I exceeded my storage quota but I didn't think I had that many files
- I can't create a folder
- I need to edit a file but it's reserved by someone else
- I don't see the folders that I expected to see in my folder list
- I'm having trouble loading the software
- I'm having trouble viewing a file or video
- There are multiple version numbers after a file name but I only uploaded one version
- URLs copied from a spreadsheet don't paste correctly
- I don't see the results I expected when searching

Sync

- I have sync problems or slow syncing
- Files and folders in my Oracle Content folder are wrong or out of date
- Icons in an Oracle Content account folder don't show sync status
- Links in my synced files aren't working
- I exited or quit the desktop app and don't know what's happened to sync
- I can't check for updates
- I can't work with a file on my desktop after I rename it
- I can't change an Oracle Content account folder location
- My files aren't compressed when I add them to a compressed folder
- I don't see a folder to sync or I can't find a synced file
- I can't restore a folder I deleted

Microsoft Office Add-On

- Why are there two Oracle Content storage services when using Microsoft Office?
- My Office add-in or Outlook add-in isn't working

- Links in Outlook email on a Mac don't work as I expect

Sharing

- I shared a folder with someone, but they can't use it the way I expected
- Someone sent me a folder link, but I can't access the files there
- I can't get a public link to send to someone in a folder that's shared with me
- Files are missing from one of my folders that I shared
- I can't create a public link to a folder I own
- I have a link to a file or folder but it requires an access code
- I stopped sharing a folder and now the subfolders aren't shared

Mobile

- What do I do if my device is lost or stolen?
- I can't view a file when I have Viewer rights in a shared folder
- I need to reset my passcode
- I can't view a file that I downloaded
- I'm having trouble viewing a video
- Where are my downloaded files stored?
- My file didn't sync in the Android app
- I got an error when transferring a file during sync in the Android app
- My edits don't appear in a file I synchronized on my Android device

Troubleshoot Browser

Here are some questions that may come up about working in your browser.

- I can't sign in
- I can't move or copy a file
- I don't see digital assets or content items
- I can't upload or download a file
- I exceeded my storage quota but I didn't think I had that many files
- I can't create a folder
- I need to edit a file but it's reserved by someone else
- I don't see the folders that I expected to see in my folder list
- I'm having trouble loading the software
- I'm having trouble viewing a file or video
- There are multiple version numbers after a file name but I only uploaded one version
- URLs copied from a spreadsheet don't paste correctly
- I don't see the results I expected when searching

I can't sign in

If you don't know your service URL or your login information, you can find that information in a welcome information that was sent to you after you were assigned an Oracle Content and Experience Cloud account. Look for an email with the subject line "Welcome to Oracle Content!" Your service administrator may have also sent a separate email with more details. If you're trying to sign in to the desktop app, use the same URL for the service as that which is used to sign in on a browser.

Note the following when logging in:

- Your login information is case-sensitive, so make sure the caps lock key isn't on.
- Check your user name and the URL for your service. This information was sent to you in an email.
- Make sure you have Internet connectivity.
- Your service is set up for specific number of users. It's possible the maximum number of users has been reached.

If you need help resetting your password, see Managing Your Password for details.

If you still can't sign in, contact your service administrator for details about your account or your password. The service administrator is the person in charge of managing the service for your organization.

I can't move or copy a file

You must have the Manager or Contributor role to move items to a shared folder or move items out of a shared folder.

You also may not be able to move a file if its size is larger than allowed or its file type is blocked. Your service administrator (the person who manages Oracle Content and Experience Cloud for your organization) sets any file size and type restrictions.

You must have a Manager, Contributor or Downloader role to copy a file from a shared folder. To copy a file into a shared folder, you need a Manager or Contributor role in the shared folder.

I don't see digital assets or content items

The digital asset and content items navigation options are only shown if you have an enterprise user role.

If your organization does not have an enterprise edition of Oracle Content and Experience Cloud installed, you won't see the **Assets** navigation option in your browser or your mobile device.

I can't upload or download a file

Your service administrator sets the maximum file size and types of files that you can upload to the cloud. You'll get an error message if you try to upload a file that's too big or the wrong type, or if you've exceeded your storage quota. You can see the maximum file size and allowed file types on your user preferences page, which you can open from your user menu.

Some browsers can't process very large files when uploading. If that happens, the upload will fail. Try splitting your file into sizes smaller than 5 GB and upload again.

When downloading a file, you must have the Download role in the folder.

If you create a public link to a file that doesn't pass virus scanning, it can't be downloaded through that public link.

I can't create a folder

There's a few reasons you may not be able to create a folder:

- If you use invalid characters, like < or /, in the folder name.
- If you use certain reserved words in the name, like NULL, AUX, or other system terms.
- You may not have the right permissions. If you're a member of a shared folder, you need a Contributor or a Manager role to create a folder.

If you can't perform an action, the action isn't available. For example, if you can't create a subfolder, the option to create a folder isn't shown.

I exceeded my storage quota but I didn't think I had that many files

If you shared folders with others and gave people permission to add content to the folder, that content counts against your storage quota. You may want to check your shared folders to see how much content is stored there. For example, if your folder contains 500 MB of files and after sharing it, other users add another 300 MB of files, then the combined 800 MB counts towards your quota.

You may also have multiple versions of a file, which count against your quota. Check the number of versions you have for your files and see if you can remove some.

I need to edit a file but it's reserved by someone else

If you need to work on a file that someone else has reserved, you can clear their reservation and an e-mail will notify them. It is still a good idea to contact them when they are available to check if they have made any edits to the document that should be incorporated into your revision.

I'm having trouble loading the software

Some plugins or extensions may interfere with the operation of the software in different browsers. If your access becomes unstable, check the history of usage for your browser to see if any new extensions have been added. Disable all browser plugins and extensions and try again.

I'm having trouble viewing a file or video

You may not be able to view a file because some file formats aren't supported, and those files can't be viewed. For example, a .zip file can't be viewed but if you have adequate permissions (at least the Downloader role), you can download the file for use.

Your service administrator may also have prohibited certain file types, so you won't be able to view those.

File previews are limited to the first 100 pages. The entire file size must be less than 158MB.

Supported video file formats are dependent on your browser, which must support the HTML5 video tag. The currently supported formats are:

- Internet Explorer: MP4

- Chrome: MP4, WebM, and Ogg

- Firefox: MP4, WebM, and Ogg

- Safari: MP4

There are multiple version numbers after a file name but I only uploaded one version

Someone else may change the file if it's stored in a shared folder. If they do that and then upload the changed version, each version of the file is saved. That way, you can compare the different versions and decide which one you want to keep.

I don't see the folders that I expected to see in my folder list

Make sure your listing shows all the items you can view. The page navigation control is at the bottom of the screen, and there may be more than one page of items.

Make sure your list displays all the files and folders you can access. Click the menu next to the heading and select **All Files**. To change your viewing list, click **Shared with You** or **Owned by You**.

If you're looking for a shared folder, it should appear in your folder list with a shared icon. Contact the person who shared the folder to make sure the invitation to share was sent and that the folder is still being shared.

If a folder was shared with a public link, it won't show in your listing as a shared folder. You can only access that folder via the public link.

URLs copied from a spreadsheet don't paste correctly

When copying a URL from a spreadsheet into a conversation, the URL may exceed the size of the conversation pane and thus not paste correctly. You must first convert the URL to text format to paste it correctly:

1. Highlight the cell containing the hyperlink.

2. Open the hyperlink dialog box.

3. Highlight the entire URL and copy it.

4. Close the hyperlink dialog box.

5. Paste the URL to the desired location.

I don't see the results I expected when searching

Your search results may not be as expected because of a few different factors.

Check and see if any of these search tips apply to your search:

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.

- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.

- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.

- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Troubleshoot Sync

Here are some questions you might have about using the desktop app.

- I have sync problems or slow syncing
- Files and folders in my Oracle Content folder are wrong or out of date
- Icons in an Oracle Content account folder don't show sync status
- Links in my synced files aren't working
- I exited or quit the desktop app and don't know what's happened to sync
- I can't check for updates
- I can't work with a file on my desktop after I rename it
- I can't change an Oracle Content account folder location
- My files aren't compressed when I add them to a compressed folder
- I don't see a folder to sync or I can't find a synced file
- I can't restore a folder I deleted

I don't see a folder to sync or I can't find a synced file

You must have at least a Downloader role in a folder in order for it to appear in the list of folders available for syncing. For example, if someone shared a folder with you and you'd like to sync it, you must have at least a Downloader role in that folder for you to see it in your list of available folders. Check with the person who shared it with you and request that your role be changed.

If a file is edited or moved on your desktop computer while the file or the folder it's contained in is modified, the file might be missing from your list of synced files. Check the local trash folder on your desktop computer for the file.

Links in my synced files aren't working

Fixed links (links that include the drive and directory structure of the target document's location, for example `C:\Finance\Sales\sales-report.doc`) probably won't work in synced files because the drive and directory structures of the synced computers are probably not identical.

Relative links (for example, `..\..\sales-report.doc`) should continue to work in synced files, if the linked files are kept in the same locations relative to each other on all computers.

I have sync problems or slow syncing

You probably won't encounter problems with file sync, because the desktop sync client resolves most of them automatically. However, sometimes a more serious underlying cause is found and you may have to intervene to resolve it.

If there is a problem, you might see ⚠ in the notification area or next to a file in your Oracle Content folder.

You can view all problems by selecting **Sync Problems** using one of these methods:

- Right-click 🗗 in the notification area (Windows) or in the menu bar extras area (Mac).

- Click 🗗 and then click ••• .

The Problems window opens where you see a list of files and problems. Click on one and you'll get an explanation of the problem and a suggestion on how to resolve it. After you make changes, the list may refresh automatically or you can click **Retry** or **Retry All** to clear all problems.

You might get a system error, which is usually a problem with your cloud connection. To see the error, click ⓘ. An error dialog is shown and there may be a **View Details** link, where you can find out more about the problem.

If you edit a file in a shared folder and someone else reserves the file while you're editing it, a sync error occurs. Your changes won't be saved unless you override the reservation and explicitly save the file from the Problems dialog.

If your sync process is running slowly, your desktop app can be optimized for better performance. Over time, the database that tracks your synced files grows slowly and can reduce productivity. From the 🗗 menu, click **Help** and then **Troubleshoot**. Click **Optimize** to clear out old data.

File Conflicts

Conflicts happen when a file is changed on more than one computer at the same time. The first version of the file to be saved or uploaded to the cloud is considered the new authentic file, and that file is then synced across all computers and the cloud. One

exception to this is if the only change is the file's name. In that case, the new name is applied to the authentic file, and it's synced.

If someone tries to save or upload another version of the file, it's kept in Oracle Content but is given a different name. That file isn't automatically synced across computers.

If you want to sync a version of the file that wasn't the first saved, rename that file yourself. This triggers the desktop app to treat the file like a new one and it will be synced to all computers and the cloud. This new version of the file is kept with the original. You can then decide whether to keep both versions, keep only the latest, or merge the content of the two.

The desktop app doesn't merge the contents of conflicting files for you. Some applications (for example, Microsoft Word) let you compare the contents of files. You can use it to view the differences between two files and decide what material from each file should be kept.

Items Not Syncing

The following types of files or folders aren't synced:

- Hidden files, like system files

- Temporary files (beginning with a tilde (~) or with a .tmp extension)

- Windows shortcuts

- Symbolic links (symlinks)

- Hidden folders

- Encrypted folders on Mac computers

- A file with a name containing any of these characters: | \ / ? " : < > *

- Files known to contain viruses. If a local virus scanner isn't enabled, an infected file is transferred from the Oracle Content folder to the cloud during sync. There it's scanned for viruses and moved to the Trash folder.

Files with file paths exceeding the 247-character limit in Windows will sync, but long paths can cause issues when using Windows. This limit doesn't apply to files in the cloud or on Mac computers.

Windows Briefcase folders are synced as if they were typical Windows folders. The special features of Windows Briefcase folders aren't supported.

I can't change an Oracle Content account folder location

You can change the location of an account folder if you need to, but only to a new location on a local hard drive. Hard drives must use NTFS formatting for Windows computers, or HFS+ formatting for Mac computers. FAT32 formatting isn't supported. You can't use other locations, such as network drives and external hard drives.

Icons in an Oracle Content account folder don't show sync status

The Microsoft Windows operating system limits the number of overlays that can be made to icons in the Windows file system. If you exceed the limitation, you may not see any sync status on your icons. If this happens, your files will still sync as long as the desktop app is still running.

My files aren't compressed when I add them to a compressed folder

Compression of synced files is not supported. You're able to add compressed folders to the Oracle Content folder for sync, but files added to these folders aren't compressed. Sync and sharing does work correctly for such folders.

I can't check for updates

If you install the desktop app, you can typically check for updates at any time by selecting **Check for Updates** from the Help menu.

If the desktop app was installed for you by a service administrator, they may prevent the ability to check for updates. If so, the option in the help menu is disabled.

Files and folders in my Oracle Content folder are wrong or out of date

There are different potential causes for this, and different levels of action that you can take to fix it.

- **Fix by rebuilding your synced folders**

  If changes made in the cloud or on other computers aren't showing correctly on your current computer, it may be because the number and complexity of changes made to folders and files in an Oracle Content folder has caused sync to be permanently lost.

  If only one or a few folders are affected, you can rebuild those folders one at a time. This uses sync records from the desktop sync client and from the cloud to rebuild each folder in an Oracle Content folder on the affected computer. To rebuild a single folder, select it from your Oracle Content folder, right-click and select **Oracle Content** and choose **Rebuild Folder**.

- **Fix by deleting the Oracle Content account from your computer**

  If most or all of your folders become unsynced, or if there are other problems that can't be fixed by rebuilding individual folders, you can remove the Oracle Content account from your computer and start over.

  This process will automatically remove the account folder from your computer. All files that were in the cloud will continue to be available from there.

  To remove the account, select **Preferences** using one of these methods:

  - Right-click ⬚ in the task bar (Windows) or in the menu bar extras area (Mac).

  - Click ⬚ and then click ⬚ .

  Select the account to delete and click **Delete**. Deleting an account clears your user account information and deletes the Oracle Content folder on your computer. You must reenter your user account information. You can re-select folders to sync and you can bring those folders back onto your computer by starting sync in the usual way.

I can't work with a file on my desktop after I rename it

There is a limit to how long the combination of file name and path to a file can be on a desktop, which is lower than that in the cloud. If you rename a file in your web browser to a length that exceeds the desktop limit, the file syncs to your computer but you can't rename, edit, or delete it. It's best to avoid lengthy file names. Try to ensure that the length of the combination of path and file name does not exceed 256 characters.

I exited or quit the desktop app and don't know what's happened to sync

If you exit or quit the desktop app on your current computer, changes to files on this computer are no longer synced to other computers, and changes from other computers are no longer synced to this computer. Sync does continue between the cloud and other computers running the desktop app (that is, between the cloud and your other computers, and those of people you are sharing files with).

When you restart the desktop app on your current computer, the files are synced with those in the cloud.

If restarting sync causes a file conflict, you see an error icon overlaid on the app icon in the system trap. Select **Sync Problems** from one of these menus to view any errors.

- Right-click ⊡ in the notification area (Windows) or in the menu bar extras area (Mac).

- Click ⊡ and then click ⠿ .

I can't restore a folder I deleted

When you delete a folder from your cloud account using your browser, that folder is moved to your Trash bin in the cloud and if you're synchronizing that folder, it's also moved to the Recycle Bin on your desktop. If you need to restore the folder, it is easiest to do it from the cloud Trash. However, if you try to restore the folder from your desktop Recycle Bin, the "restore" location is a ".tmp" folder in your desktop account folder, not the original location. Make sure you can view all files, including hidden files, in your account folder and you can then restore the folder by moving it from the temporary location to the location you want.

Troubleshoot Microsoft Office Add-On

Here are answers to questions that may come up about using the Microsoft Outlook or Office add-ons.

- Why are there two Oracle Content storage services when using Microsoft Office?
- My Office add-in or Outlook add-in isn't working
- Links in Outlook email on a Mac don't work as I expect

Why are there two Oracle Content storage services when using Microsoft Office?

If you use Microsoft Office 2013 and 2016, you may see an additional Oracle Content storage service account available. This is caused by a compatibility problem between Microsoft Office 2013 and Microsoft Office 2016. If you attempt to add the second account, an error may result that indicates the Oracle Content add-in is not correctly installed. If you use the same version of the software on all your desktops you won't see this incompatibility.

My Office add-in or Outlook add-in isn't working

The Office add-in radial menu appears when you edit a Microsoft file, such an Excel spreadsheet and it lets you quickly access several menu options. The Outlook add-in lets you add links to conversations and documents in your email using the Outlook toolbar. If these add-ins become disabled, you can re-enable them following these steps:

1. Open any Microsoft file, such as a Word, Power Point, or Excel file.
2. Click **File**, then **Options** and then **Add-Ins**.
3. In the Manage area at the bottom of the dialog, make sure **COM Add-ins** is selected and then click **Go**.
4. In the COM Add-Ins dialog, select **Oracle Content Add-In for Office**.
5. Exit and restart your Microsoft program to enable the add-in.

If your Office add-in is enabled but not working, there may be another reason:

- You only see the Office radial menu for files that are being synced using the Oracle Content sync client. Make sure your files are being synced and that the sync app is active.
- Make sure the radial menu is enabled. You can also show or hide the menu by right-clicking on the desktop app icon in your notification area on your computer. Choose **Preferences** and then **Hide Radial Menu** or **Show Radial Menu**.
- The radial menu only works with Office versions 2010 and later.
- The radial menu only works with locally installed Office applications, not web-based applications.

Links in Outlook email on a Mac don't work as I expect

Links to an Office file, such as a Word file or spreadsheet, may not open correctly on an Apple Mac computer.

When a link is sent to an Office document to a person using a Mac, the document link will not open correctly. The Outlook software recognizes the Office extension and attempts to open the corresponding Office app rather than use the browser to view the document.

There are several workarounds for this issue:

- Right click on the link and select **Open Link** to open the link in a browser.

- Remove the document name from the link.

- Replace the period in the document name with an underscore.

Any of those actions will open the file correctly.

Troubleshoot Mobile

Here are some questions you might encounter when using your mobile device.

- What do I do if my device is lost or stolen?

- I can't view a file when I have Viewer rights in a shared folder

- I need to reset my passcode

- I can't view a file that I downloaded

- I'm having trouble viewing a video

- Where are my downloaded files stored?

- My file didn't sync in the Android app

- I got an error when transferring a file during sync in the Android app

- My edits don't appear in a file I synchronized on my Android device

I need to reset my passcode

To reset your passcode, you have to know the old passcode. Sign in to the app and on the Settings page, go to the Security section. You'll see an option there to change your passcode.

If you don't know your old passcode, tap **Forgot Passcode** to sign out of the app. You can then sign back in and reset your passcode.

I can't view a file when I have Viewer rights in a shared folder

You need to have a Downloader, Contributor, or Manager role to view files on an iPhone or iPad because files must be downloaded first before you can view them. If you don't have a role that lets you download a file, then you can't view the file.

I can't view a file that I downloaded

To view a file, you need the right software on your device. For example, if you downloaded a PDF file, you would need an app on your device that can open a PDF file. If you don't have the right app, you won't be able to view the file.

I'm having trouble viewing a video

When playing a video on an iPad or iPhone, the video is downloaded and played in the app using the native iOS viewer. If a format can't be viewed, you can download the video and open it another app for viewing.

When playing a video on an Android device, use the **Open In** option to play the video using a different viewer on the device.

Where are my downloaded files stored?

Downloaded files are stored in the Downloads area on an iPhone or iPad. To access that area, go to the navigation menu and tap **Downloads**.

There is no Downloads area on an Android device. You can synchronize files on an Android device to work with them in another app, the same way downloaded files are used in another app on an iPad or iPhone.

You can delete any file that's downloaded to your device without affecting the original copy stored in the cloud. Go to the Downloads area and find the file you want to delete from your device. Select the file or files to delete and tap **Delete** at the bottom of the screen.

My file didn't sync in the Android app

Sync may not happen for a couple of reasons:

- If you aren't connected to a network.

- If you don't have automatic sync turned on. Tap to access your settings. Choose the account you want to use then tap **Synchronization Settings** and turn on auto-sync.

I got an error when transferring a file during sync in the Android app

A sync error might happen in the following circumstances:

- If you're syncing a file and you lose your connection to Oracle Content or to the network. Try re-syncing the individual file or do a full sync of all files.

- If your local file storage is full. Your device may be out of space and can't save the synced file. Check your storage amount and delete files if needed.

My edits don't appear in a file I synchronized on my Android device

When you choose to auto-synchronize a file on your Android phone or tablet, the file on your device is kept current with the file that's stored in the cloud according to the update frequency you specified. When the file in the cloud is updated, the copy on your device is automatically updated, too.

If you edit the file using another app on your Android phone or tablet, its counterpart in the cloud isn't updated automatically. You'll have to upload it to the cloud to update the copy there.

What do I do if my device is lost or stolen?

When you use Oracle Content and Experience Cloud from a mobile device or the sync client, the information about that access is saved. If you lose your device or it's taken, you should remove that device from the list of those used to access the service. To remove a device and revoke the access for it:

1. Sign in to Oracle Content and Experience Cloud in a web browser.

2. Click your user name and select **Preferences**.

3. Select **Linked Devices** from the dropdown menu near the Preferences heading.

4. Find the device to remove and click **Revoke**.

Your device's authorization to access the service is removed. The next time you or anyone else tries to activate the app on the device, the account is signed out and all local content stored on the device for that account is deleted.

Revoking access for the device affects only one account, so if you're using multiple accounts, you need to revoke access separately for each account to block all access to Oracle Content and Experience Cloud and delete all local content stored on the device.

Troubleshoot Sharing

Here are some questions you might have about sharing your content or sites.

- I shared a folder with someone, but they can't use it the way I expected
- Someone sent me a folder link, but I can't access the files there
- I can't get a public link to send to someone in a folder that's shared with me
- Files are missing from one of my folders that I shared
- I can't create a public link to a folder I own
- I have a link to a file or folder but it requires an access code
- I stopped sharing a folder and now the subfolders aren't shared

I shared a folder with someone, but they can't use it the way I expected

When you share a folder, you assign a role to the people you invite to the folder. Depending on the role you assigned, that person may not be able to download files, edit files, or do other actions. You can change the role assigned to someone as needed

If you email a Member link to someone, that person must be able to log in to Oracle Content and Experience Cloud to access the files in a folder. If you need to share a folder with someone who doesn't have access to the service, email a public link instead.

If you created a public link for a folder then emailed that link to someone, that person may not have the necessary rights to the folder. The default role for public links is Viewer but you can change the default role. To see the defaults for your account, click your user name and then click **Preferences**.

Someone sent me a folder link, but I can't access the files there

You may not have the appropriate permissions to access a file in a folder. If the link is to a shared folder, you may have been removed as a member of the folder or your role may have changed in the folder, limiting your access to the files.

If the folder link was created as a public link, that public link might be removed and therefore the link will stop working. When a public link is sent, a role is assigned to the

person receiving the link. If the link was sent with a Viewer role, then files can't be downloaded.

It's possible that someone may have deleted the folder that was shared with you. In that case, the link won't work.

I stopped sharing a folder and now the subfolders aren't shared

If you share a parent folder that you own and then change your mind and remove sharing, all the subfolders that were shared are no longer shared.

I have a link to a file or folder but it requires an access code

A public link can be created that requires an access code to use the link. This is created by the person who creates the link. You'll need to contact the person who sent the link to get the access code.

I can't get a public link to send to someone in a folder that's shared with me

When someone shares a folder with you, you're assigned a role. Depending on your role, you may not be able to email a public link to a file in that shared folder. When that happens, the Public link tab isn't available.

Files are missing from one of my folders that I shared

If you share a folder and assign a Manager or Contributor role to someone for the folder, that person can also delete files from the folder or delete subfolders.

If the item is deleted using the browser, the items appear in the Oracle Content and Experience Cloud Trash folder for the owner of the items and the person who deleted the items. Either the owner or the person who deleted the items can restore the items from Trash. Only the owner can permanently delete the items in Trash.

If the items are being synchronized using the desktop sync client, the deleted items appear in the recycle bin on your desktop even if you were not the person who deleted the items.

It's best to restore the files from the Trash folder using the web browser. That way you can be sure you have the latest copy of the information.

Your service administrator can set the length of time that items in Trash are retained. If the item is missing, it may be that your Trash was automatically emptied.

I can't create a public link to a folder I own

Your service administrator may have disabled public links. To check, click **Preferences** and then **Sharing**. If the Public options aren't available, they've been disabled.