

Oracle® Fusion Middleware

Using Oracle WebCenter Content: Desktop

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Oracle Fusion Middleware Using Oracle WebCenter Content: Desktop, 11g Release 1 (11.1.1)

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Preface

Oracle WebCenter Content: Desktop provides convenient access to the files on a number of content repositories (including Oracle WebCenter Content Server and Oracle Content Database) from a number of familiar desktop applications, such as Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), email clients (Microsoft Outlook and Lotus Notes), and web browsers (Internet Explorer, Mozilla Firefox, and Google Chrome).

Audience

This document is intended for end users who are using the Oracle WebCenter Content: Desktop 11gR1 client software on their computers.

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>.

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Related Documents

For more information on using Oracle WebCenter Content, see *Using Oracle WebCenter Content*.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
<i>italic</i>	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.

What's New and Changed in This Guide

This section outlines the new features and enhancements in Oracle WebCenter Content: Desktop 11gR1:

- [New and Changed Features for 11g Release 1 \(11.1.1.8.0 MLR3\)](#)
- [New and Changed Features for 11g Release 1 \(11.1.1.8\)](#)
- [New and Changed Features for 11g Release 1 \(11.1.1.7\)](#)
- [New and Changed Features for 11g Release 1 \(11.1.1.6\)](#)
- [New and Changed Features for 11g Release 1 \(11.1.1.4\)](#)
- [New and Changed Features for 11g Release 1 \(11.1.1.3\)](#)

New and Changed Features for 11g Release 1 (11.1.1.8.0 MLR3)

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8.0 MLR3) is a maintenance release which offers the following new features compared to version 11g Release 1 (11.1.1.8), in addition to various bug fixes.

Improved Support for Workflow Assignments

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8.0 MLR3) extends workflow support to the WebCenter Content user interface offered by Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) and higher. To accommodate this enhancement, some changes have been made to the Microsoft Office dialogs, as well as to the context menus. See [Chapter 7, "Working with Managed Content in Workflows."](#)

Improved Formatting for Links Inserted into Microsoft Outlook Messages

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8.0 MLR3) provides improved formatting for links to managed content inserted into or attached to Microsoft Outlook messages. See [Section 12.6, "Inserting Links to Content Files on a Server into Email"](#) and [Section 12.7, "Attaching Content Files on a Server to Email."](#)

Automatic Population of Email Metadata on Drag and Drop to Folder

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8.0 MLR3) provides improved support when checking in an Outlook email message by dragging and dropping to a content folder on a server. The check-in form that appears during this process is now automatically populated with metadata (subject, sender, recipient, etc.) relevant to the message being checked in. See [Section 12.5.2, "Checking In Email Messages By Dragging and Dropping."](#)

Support for Microsoft Office 2013 and conditional support for Microsoft Windows 8

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8.0 MLR3) provides support for Microsoft Office 2013 applications. This release can also be used on computers using the Microsoft Windows 8 operating system, provided that Internet Explorer 11 is **not** installed. This release will work correctly with Microsoft Windows 8 if Internet Explorer 10 is installed. See [Section 1.3, "Supported Client Applications."](#)

New and Changed Features for 11g Release 1 (11.1.1.8)

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8) is a maintenance release which offers the following new features compared to version 11g Release 1 (11.1.1.7), in addition to various bug fixes.

Support for the New WebCenter Content User Interface

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8) supports the new WebCenter Content user interface offered by Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) and higher. The alternative user interface (the native 11g user interface) continues to be supported in this release.

For more information about the WebCenter Content user interface and the native 11g user interface, see *Using Oracle WebCenter Content*.

Improvements to Microsoft Outlook Integration

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.8) provides the following improved support for Microsoft Outlook:

- Content server folders can now be added to your Favorite Folders list. The **Add to Favorite Folders** and the **Remove from Favorite Folders** options are now available on the context menu for folders under WebCenter Content Servers in the Mail Folders panel.
- You can now set an option that will begin the check-in process for all emails after they are sent.
- The file name of an attachment or message is now shown in the check-in dialog.
- Attachments that have been checked in separately are shown as related content on Content Information pages (if the content server has been configured for related content).

New and Changed Features for 11g Release 1 (11.1.1.7)

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) is a maintenance release which offers the following new features compared to version 11g Release 1 (11.1.1.6), in addition to various bug fixes.

Lotus Notes Client Support

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) now supports versions 8 through 8.5.3 of the Lotus Notes client.

Update Metadata Context Menu Item

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) allows you to update folder and content metadata using the Update Metadata context menu item on folders and content items (assuming that you have sufficient privileges to change the

metadata). This is additional to the current ability to edit metadata in the preview pane or in the Content Information dialog.

Creating New Emails that Include Links to a File

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) adds a **Send link by email option** to the preview pane. This lets you create a new email that includes links to the currently selected file.

Enhancements for Users of Oracle Content Database

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) includes the following enhancements for users of Oracle Content Database:

- You will no longer be prompted for username/password credentials every time you access a document's advanced properties. After the first time, your credentials will be reused.
- You are now able to drag and drop a document onto a folder where metadata is mandatory. You will be prompted to supply the metadata.
- You no longer have to explicitly check out a document before editing it. Instead, you can open the document, make changes to it, then decide whether to check it in. If you decide not to check it in, the underlying checkout is undone. This applies to Microsoft Word, Excel, and PowerPoint documents.

New and Changed Features for 11g Release 1 (11.1.1.6)

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) is a maintenance release which offers the following new features and enhancements compared to version 11g Release 1 (11.1.1.4).

Note: The availability of the new features in this list depends on the version of the Desktop, folder and core components installed on Oracle WebCenter Content Server.

Rebranding to Oracle WebCenter Content: Desktop

Oracle Enterprise Content Management Suite (Oracle ECM) is now part of the Oracle WebCenter product stack to provide the most complete, open, and unified enterprise content management platform. The desktop integration software and documentation have been rebranded accordingly.

Oracle WebCenter Content Server's Quick Search Integration into Windows Explorer

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) offers integration of Oracle WebCenter Content Server's Quick Search feature into Windows Explorer, which allows you to quickly search for content on an Oracle WebCenter Content Server instance. For more information, see [Section 5.9, "Quick Search Integration"](#) and [Section 6.4, "Searching for Content Files."](#)

Oracle WebCenter Content Search Engine Plug-in for Web Browsers

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) provides search engine plug-ins for Internet Explorer, Mozilla Firefox, and Google Chrome, which allow you to perform quick searches on an Oracle WebCenter Content Server instance directly from the web browser search bar without having to go through the content server's

web interface. For more information, see [Chapter 13, "Working with the Web Browser Integration."](#)

Improvements in Windows 7 and Windows Vista Explorer Integrations

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) uses the native shell view in Windows 7 and Windows Vista rather than the proprietary shell view used in previous releases. This optimizes the end-user experience, allowing for such things as improved use of the preview and details panes, high-resolution overlays for large file icons, and the like.

New Integration Hierarchy Structure

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) introduces a new integration hierarchy structure for Oracle WebCenter Content Server instances, which more closely resembles the web interface than previous releases. The top-level nodes now include My Content Server, New Check-In, and Browse Content. See [Section 3.4, "Oracle WebCenter Content Server Repositories."](#)

New Check-in Profiles Node

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) adds the defined content profiles on an Oracle WebCenter Content Server instance to the integration hierarchy, which provides a way for users to contribute content to a server in Windows Explorer without using a folders tree.

Improved Viewing and Copying of Locally Cached Files vs. Files on Servers

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) improves the way you can view and copy files that are checked out or available offline. In previous releases, it would always be the server copy of a file that was viewed or copied even if a locally cached version was available (for example, a managed Office document that was edited, but not yet checked back in to the server). In this release, the context menu of managed files in Windows Explorer provides explicit options to open or view the local or server file: **View/Copy File From Server** vs. **View/Copy** (from local cache). See [Section 6.9, "Viewing Content Files"](#) and [Section 6.16, "Copying Libraries, Folders, and Files."](#)

Offline Files Node

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) adds an Offline Files node to an offline content server in the integration hierarchy, which lists all files on that server that are offline, including those that are not in a content folder. Users can interact with these files directly from the list. See [Section 8, "Working with Offline Content."](#)

Improved Search Performance

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) improves performance when returning the results of searches.

Support for Framework Folders

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) adds support for the Framework Folders content hierarchy component while retaining support for the Folders_g content hierarchy component.

Propagating Selected Metadata Fields

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to propagate selected metadata fields and values to underlying folders and files on Oracle

WebCenter Content Server instances running Framework Folders. In earlier releases, you could only propagate all metadata fields and you had no control over the field values. See [Section 6.19, "Propagating Library and Folder Metadata."](#)

Information Bar in Microsoft Office Applications

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) introduces an information bar for managed documents in Microsoft Office application which provides content management details about the document. See [Section 10.2, "Opening and Viewing an Existing Managed Document."](#)

Read-only Reminder for Documents in Most-Recently-Used (MRU) List

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) shows a reminder when you open a document from the most-recently-used (MRU) list if that document was opened in read-only mode previously. You can then choose to open it in read-only mode again or in full edit mode.

Checking Out Local Copies of Managed Documents in Microsoft Office Applications

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to check out local copies of managed documents from within Microsoft Office applications. This saves you from having to close the document and reopen it in full edit mode. See [Section 10.4, "Checking Out a Managed Document in View Mode."](#)

Turning Managed Office Documents into Unmanaged Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to 'unmanage' managed documents in Microsoft Office applications; that is, remove the document properties that associate it with a particular content server. This effectively turns the document into a brand-new, unsaved document that you cannot check back in to the server as a new revision of the original document. See [Section 10.10, "Turning a Managed Document into an Unmanaged Document."](#)

Opening a Different Revision of a Managed Office Document

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) makes it easier to open a different revision of a managed Office document than the one that is currently open in the Microsoft Office application. This may be useful if you opened a document that may have newer revisions on the server. See [Section 10.5, "Opening a Different Revision of a Managed Document."](#)

Refreshing the Current Managed Document to the Latest Revision on the Server

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to refresh the current managed document in a Microsoft Office application to show the latest revision from the content server. This may be useful if you opened a document that may have newer revisions on the server. See [Section 10.6, "Refreshing a Managed Document."](#)

Inserting Items into Office Documents Using the Context-Sensitive Menu

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to insert managed content or links to managed content using the context-sensitive (right-click) menu in Microsoft Office applications. You can also still use the WebCenter Content menu or ribbon. For more information, see [Section 10.11, "Inserting Managed Content into Microsoft Office Documents."](#)

Inserting Multiple Items into Office Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to select multiple content items on an Oracle WebCenter Content Server instance at the same time and insert their contents or links to them into Microsoft Office documents. For more information, see [Section 10.11, "Inserting Managed Content into Microsoft Office Documents."](#)

The ability to add comments has also been added to the special close dialog. See [Section 9.4, "Close Dialog."](#)

Adding Comments to Office Documents Upon Check-in

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to add comments to Office documents when checking them in from Microsoft Office applications. For more information, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)

Simple Closing of Managed Office Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) supports closing managed Office documents in much the same way as unmanaged Office documents ("Do you want to save the changes?"). The default is still the old method using the special close dialog, but simple document closing can be enabled using a configuration setting.

Undoing the Check-Out of Unchanged, Managed Office Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to cancel the checked-out status of the managed document currently open in a Microsoft Office application if you close that document and no changes were made since you opened it (and checked it out).

Attaching Multiple Content Items to Email Messages

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to select multiple content items on an Oracle WebCenter Content Server instance and attach them all to an email at the same time. For more information, see [Section 12.7, "Attaching Content Files on a Server to Email."](#)

Showing Only Published Content on Oracle WebCenter Content

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to show only content on Oracle WebCenter Content in the integration hierarchy that has been released. This hides content items that are currently in a workflow, are being converted or indexed, or have a future release date. For more information, see [Section 6.20, "Showing or Hiding Unpublished Content Files."](#)

Open With... Option

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to open files that are checked out or available offline with different applications than their associated applications based on the file extensions. For more information, see [Section 6.10, "Opening Content Files."](#)

Query Folders

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows current search results and saved queries to be dragged-and-dropped or copied-and-pasted anywhere in the content folders tree to become dynamic query folders. These will always contain the content items on a server that meet the specified criteria, allowing you to create virtual groupings of content. For more information, see [Section 6.5, "Working with](#)

[Saved Search Queries and Query Folders.](#)"

Personal Folders

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) supports personal folders, which provide quick and convenient access to content items on an Oracle WebCenter Content Server instance. For more information, see [Section 6.22, "Working with Your Personal Folders."](#)

Changing Folder Locations of Content Items

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to associate content items with a folder by dragging and dropping them into the target folder, even if they were not associated with any content folder before. You can drag and drop items not only from a content folder, but also from search results lists, query folders, and My Content Server nodes. For more information, see [Section 6.17, "Moving Libraries, Folders, and Files To and From a Server."](#)

Email Metadata Mapping

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) offers configuration pages in the Oracle WebCenter Content Server web interface that enable system administrators to define how email header fields are mapped to Content Server metadata fields. In previous releases these configuration pages were available only if Oracle WebCenter Content: Records was installed on the server, but this is no longer required. For more information, see *Managing Oracle WebCenter Content*.

Component Configuration pages on Oracle WebCenter Content Server

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) offers configuration pages in the Oracle WebCenter Content Server web interface that enable system administrators to set configuration options for the DesktopIntegrationSuite, DesktopTag, and EmailMetadata components.

Improved User Assistance

In addition to covering the new features and enhancements in this release, the user documentation and online help for Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) have been significantly restructured and rewritten for improved usability, and optimized for Windows 7 user environments.

New and Changed Features for 11g Release 1 (11.1.1.4)

Desktop Integration Suite 11g Release 1 (11.1.1.4) is a maintenance release which offers the following new features and enhancements compared to version 11g Release 1 (11.1.1.3).

Support of 64-bit Microsoft Windows 7

Desktop Integration Suite 11g Release 1 (11.1.1.4) provides Windows Explorer integration in 64-bit Microsoft Windows 7. (The previous release supported 32-bit Windows 7 only.)

Native 64-bit Integration with Microsoft Windows

Desktop Integration Suite 11g Release 1 (11.1.1.4) provides native 64-bit Windows Explorer integration in all supported Microsoft Windows versions (XP, Vista, and 7) using 64-bit Windows Explorer rather than the 32-bit version used in the previous release.

Integration with Microsoft Office 2010

Desktop Integration Suite 11g Release 1 (11.1.1.4) provides integration with Microsoft Office 2010 applications (Word, PowerPoint, Excel, and Outlook), both 32-bit and 64-bit versions.

Most Recently Used (MRU) List in Microsoft Office Applications

Desktop Integration Suite 11g Release 1 (11.1.1.4) offers most recently used (MRU) lists in Microsoft Office applications, which enable users to quickly reopen content items on Oracle WebCenter Content Server they worked on before. For more information, see [Section 9.5, "Most-Recently-Used \(MRU\) List."](#)

Check Out Option for Read-Only Documents

Desktop Integration Suite 11g Release 1 (11.1.1.4) includes a check-out option on the Oracle UCM menu or ribbon in Microsoft Office applications, which enables users to check files that were opened in read-only mode out of the content server. They can then make changes and check it back in to the server as a new revision of the content item.

Overriding the Default Profile Selection During Check-ins

By default, Desktop Integration Suite 11g Release 1 (11.1.1.4) allows users to change the default content profile when prompted for metadata in the Check In Content dialog. (The previous release would not allow changing the default content profile.) This behavior can be controlled using a Windows Registry switch.

New and Changed Features for 11g Release 1 (11.1.1.3)

Desktop Integration Suite 11g Release 1 (11.1.1.3) is the first 11g release, which offers many new features and enhancements compared to version 10gR3.

Note: Some of the new features may not be available on all servers, depending on their server type, software version, and system configuration. See [Section 2.3, "Content Server Capabilities"](#) for further details.

Integration with Oracle Content Server 11gR1

Desktop Integration Suite 11g Release 1 (11.1.1.3) fully supports Oracle Content Server 11gR1 and Oracle WebCenter Content Server 11gR1. The client software can communicate with Oracle WebCenter Content Server 11gR1 as well as Oracle Content Server 11gR1 and 10gR3 (with the DesktopIntegrationSuite component installed and enabled). Other Content Server versions are not supported.

Integration with Oracle Content Server provides the broadest content management capabilities directly in the supported desktop applications. You can search for files on the server (using queries or by browsing), open files from the server (check out), save files (check in), and perform a number of other advanced content management tasks (such as comparing Word files on the content server or inserting files from the server into Office documents).

Not all features of Desktop Integration Suite 11gR1 may be available when you are connecting to a pre-11g Content Server instance.

Integration with Oracle Content Database Servers

Desktop Integration Suite 11g Release 1 (11.1.1.3) can communicate with Oracle Content Database (Oracle Content DB) servers. The client software can communicate with Oracle Content DB 10gR1 (10.2).

Integration with Oracle Content Database provides basic content management capabilities directly in the supported desktop applications. You can browse to files on the server, open files from the server (check out), and save files (check in).

Improved Integration with Other WebDAV Servers

Desktop Integration Suite 11g Release 1 (11.1.1.3) provides improved integration with WebDAV servers that are not Oracle Content Server or Oracle Content Database instances. It now provides more content management capabilities, such as checking items in and out, undoing check-outs, and making items available offline.

Integration with Microsoft Windows 7

Desktop Integration Suite 11g Release 1 (11.1.1.3) provides Windows Explorer integration in Microsoft Windows 7 (32-bit only).

Integration with 64-bit Microsoft Windows XP and Vista

Desktop Integration Suite 11g Release 1 (11.1.1.3) provides Windows Explorer integration in 64-bit Microsoft Windows XP and Vista (it uses the 32-bit version of Windows Explorer).

No more ODMA for Microsoft Office Integration

Desktop Integration Suite 11g Release 1 (11.1.1.3) no longer uses ODMA for Microsoft Office integration. Dedicated integration menus and ribbons are now used in the Microsoft Office applications to interact with content servers.

Oracle Content Server Profiles

Desktop Integration Suite 11g Release 1 (11.1.1.3) supports selection of Oracle Content Server profiles on search and check-in pages. Content profiles allow content server administrators to control what metadata fields are shown on content pages (including the check-in form) and to set default metadata for files depending on their application type. This feature is available only if you are connecting to an Oracle Content Server 11g instance, not earlier versions.

Oracle Content Server Productivity Nodes

Desktop Integration Suite 11g Release 1 (11.1.1.3) supports the Oracle Content Server productivity nodes, which means that My Workflow Assignments, My Checked-Out Content, and My Saved Queries are displayed as special server folders under Oracle Content Servers in Windows Explorer and supported email applications (Microsoft Outlook and Lotus Notes). This feature is available only if you are connecting to an Oracle Content Server 11gR1 instance, not earlier versions. For more information, see [Chapter 3, "Understanding the Integration Hierarchy."](#)

Metadata Prompts for New Files in Contribution Folders

Desktop Integration Suite 11g Release 1 (11.1.1.3) may prompt for metadata when you drag and drop, copy and paste, or save new files to a contribution folder on an Oracle Content Server instance, if that feature has been enabled for that folder or if required metadata is missing. This feature is available only if you are connecting to an Oracle Content Server 11gR1 instance (not earlier versions) or Content DB Server instance. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)

Inserting Links, File Contents, and Images into Microsoft Office Documents

Desktop Integration Suite 11g Release 1 (11.1.1.3) enables you to insert links to files, content of files, and images on an Oracle Content Server instance into supported Microsoft Office documents (Word, Excel, and PowerPoint). For more information, see [Section 10.11, "Inserting Managed Content into Microsoft Office Documents."](#)

User Interface for Comparing Word Documents on Content Server

Desktop Integration Suite 11g Release 1 (11.1.1.3) provides a user interface in Microsoft Word (menu items and selection dialog) that enables you to compare Word documents managed on an Oracle Content Server instance. You can compare a document with an earlier revision of the same document or with a different file on the content server. For more information, see [Section 10.12, "Comparing Managed Microsoft Word Documents."](#)

Expanded Localization

The client software for Desktop Integration Suite 11g Release 1 (11.1.1.3) has been localized into more languages than previous releases (see [Section 1.4, "Localized User Interface"](#)).

Improved User Assistance

The user documentation and online help for Desktop Integration Suite 11g Release 1 (11.1.1.3) have been completely rewritten and have been significantly expanded.

Part I

Introduction to Oracle WebCenter Content: Desktop

This section provides an overview of the general features of Oracle Webcenter Content: Desktop.

Part I contains the following chapters:

- [Chapter 1, "Getting Started with Oracle WebCenter Content: Desktop"](#)
- [Chapter 2, "Working with Content Server Connections"](#)
- [Chapter 3, "Understanding the Integration Hierarchy"](#)
- [Chapter 4, "Understanding Enterprise Libraries, Folders, and Files"](#)

Getting Started with Oracle WebCenter Content: Desktop

This section covers these topics:

- [Section 1.1, "About Oracle WebCenter Content: Desktop"](#)
- [Section 1.2, "Supported Content Repositories"](#)
- [Section 1.3, "Supported Client Applications"](#)
- [Section 1.4, "Localized User Interface"](#)
- [Section 1.5, "Accessibility Features"](#)
- [Section 1.6, "Setting Up the Desktop Client Software on Your Computer"](#)

1.1 About Oracle WebCenter Content: Desktop

Oracle WebCenter Content: Desktop provides a set of embedded applications that help you seamlessly integrate your desktop experience with Oracle WebCenter Content Server, Oracle Content Server, Oracle Content Database, or other WebDAV-based content repositories. More specifically, it provides convenient access to these content servers directly from Microsoft Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), email clients (Microsoft Outlook and Lotus Notes), and web browsers (Internet Explorer, Mozilla Firefox, and Google Chrome).

Integrating content repositories such as Oracle WebCenter Content Server with your desktop applications improves your ability to work with files on the content server. You can easily manage files on the server and share files with other users directly from your desktop in addition to using the web browser interface. Desktop provides a simplified interface for managing files in a unified way from all your familiar desktop applications.

Note: Desktop can work with all content files on Oracle WebCenter Content Server instances, including records and sealed documents (as managed by Oracle Information Rights Management).

1.2 Supported Content Repositories

The client software of Oracle WebCenter Content: Desktop 11gR1 can connect to these content repositories:

- [Oracle WebCenter Content Server and Oracle Content Server](#)
- [Oracle Content Database](#)

- [Other Content Repositories That Support the Standard WebDAV Protocol](#)

Oracle WebCenter Content Server and Oracle Content Server

Oracle WebCenter Content: Desktop 11gR1 can connect to Oracle WebCenter Content Server and Oracle Content Server repositories. For the latest information on the supported server configurations, see the Oracle Fusion Middleware Supported System Configurations page at:

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

For the Desktop client software to connect to Oracle WebCenter Content Server or Oracle Content Server, the following components must be installed and enabled on the server:

- **DesktopIntegrationSuite**, which handles core content management integration functions on the server. This component is included in the Desktop distribution zip file. It is also installed along with the Oracle WebCenter Content Server 11gR1 software, but the component is not enabled by default.
- **CoreWebdav**, which provides core WebDAV capabilities for the content management integrations. This component is one of the Oracle WebCenter Content Server or Oracle Content Server system components.
- **Framework Folders** (11gR1 11.1.1.6 or higher) or **Folders_g** (11gR1 prior to 11.1.1.6 and 10gR3), which enables the content folders in the integration hierarchy. These components are part of the Oracle WebCenter Content Server or Oracle Content Server core.
- **CheckoutAndOpenInNative**, which enables content items to be checked out from Oracle WebCenter Content Server or Oracle Content Server and opened in their associated applications. This component is one of the preinstalled Oracle WebCenter Content Server or Oracle Content Server system components, and it is also included in the Desktop distribution zip file.

Note: This document assumes that servers are running the latest Oracle WebCenter Content Server version with the Framework Folders component.

In addition, the following optional components may be installed and enabled:

- **DesktopTag**, which manages custom properties in Microsoft Office files that are used for content tracking purposes, and also provides the workflow processing functionality in Microsoft Office applications. This component is included in the Desktop distribution zip file. It is also installed along with the Oracle WebCenter Content Server 11gR1 software, but the component is not enabled by default.
- **OracleCleanContent**, which is used by DesktopTag. This component is one of the Oracle WebCenter Content Server or Oracle Content Server system components.
- **EmailMetadata**, which maps email message fields to email metadata fields and is also required for dragging and dropping emails into content folders in Microsoft Outlook and Lotus Notes. This component is included in the Desktop distribution zip file. It is also installed along with the Oracle WebCenter Content Server 11gR1 software, but the component is not enabled by default.
- **RMAEmail**, which provides email metadata fields and enables users to work with email distribution lists. This component is part of Oracle WebCenter Content:

Records. (Oracle WebCenter Content: Records cannot be used with a server that is using the WebCenter Content user interface.)

Note: The Desktop 11gR1 components (DesktopIntegrationSuite, CheckoutAndOpenInNative, DesktopTag, and EmailMetadata) can be installed on Oracle WebCenter Content Server 10gR3, but the product build number of the server must be 7.2.4.55 or higher. To see this number, go to the Administration page of the server and then click 'Configuration for *server_name*'. The build number is included on the configuration information page, under 'System Configuration'.

Integration with Oracle WebCenter Content Server provides the broadest content management capabilities directly in the supported desktop applications. Not all features of Desktop 11gR1 may be available if you are connecting to a pre-11g Oracle Content Server instance. See [Section 2.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for Oracle WebCenter Content Server instances.

Oracle Content Database

Oracle WebCenter Content: Desktop 11gR1 can connect to Oracle Content Database repositories. For the latest information on the supported server configurations, see the Oracle Fusion Middleware Supported System Configurations page at:

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

Integration with Oracle Content Database provides basic content management capabilities directly in the supported desktop applications. See [Section 2.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for Oracle Content Database instances.

Other Content Repositories That Support the Standard WebDAV Protocol

Integration with WebDAV servers provides basic content management capabilities directly in the supported desktop applications. The WebDAV DeltaV extension is not supported. See [Section 2.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for WebDAV servers.

Note: See [Chapter 2, "Working with Content Server Connections"](#) for more information on connecting to content servers.

1.3 Supported Client Applications

The Desktop client software can integrate each of the following client applications with the supported content servers. The installer automatically detects the supported applications on your computer and installs the appropriate integration features to provide these applications direct access to content management functionality.

Windows Explorer

- Microsoft Windows XP (SP2 or higher, 32-bit or 64-bit version)
- Microsoft Windows Vista (SP1 or higher, 32-bit or 64-bit version)
- Microsoft Windows 7 (32-bit or 64-bit version)

File Explorer

- Microsoft Windows 8

Use Microsoft Windows 8 with Internet Explorer 10.

WebCenter Content: Desktop will not work correctly on Microsoft Windows 8 if Internet Explorer 11 is installed.

Desktop Applications

- Microsoft Word 2002 (XP) through 2013
- Microsoft PowerPoint 2002 (XP) through 2013
- Microsoft Excel 2002 (XP) through 2013

Note: You can interact with content servers from within these applications directly. Files created in other office applications (such as Microsoft Visio or Corel WordPerfect) can be managed using Windows Explorer integration or the content server's web interface.

Email Client Applications

- Microsoft Outlook 2002 (XP) through 2013
- Lotus Notes email client version 8 (through 8.5.3), with Lotus Domino mail databases based on release 8 mail templates

Note: The Desktop client software can coexist with the Oracle Beehive extensions for Microsoft Outlook and Windows Explorer.

Web Browsers (for the Search Engine Plug-in)

- Microsoft Internet Explorer 8.0 or higher.

You cannot use Internet Explorer 11 if your operating system is Microsoft Windows 8.

- Mozilla Firefox 3.5 or higher
- Google Chrome 10 or higher

For more information on setting up client computers for use with Desktop, see [1.6](#) , "[Setting Up the Desktop Client Software on Your Computer](#)"

1.4 Localized User Interface

Oracle WebCenter Content: Desktop 11gR1 offers localized user interfaces for the client software. The following user interface languages are supported: English, German, French, Spanish, Portuguese (both Brazil and Portugal), Italian, Dutch, Danish, Swedish, Norwegian, Finnish, Polish, Czech, Slovak, Hungarian, Romanian, Russian, Greek, Turkish, Hebrew, Chinese (both Simplified and Traditional), Japanese, Korean, Thai, and Arabic.

The user interface language is automatically set to match the locale of the operating system; for example, if you are running a German version of Microsoft Windows, then the Desktop user interface will also be German.

1.5 Accessibility Features

Oracle WebCenter Content: Desktop complies with Oracle's accessibility guidelines. It provides accessibility features in a number of areas:

- [Menu Access](#)
- [Context Menus](#)
- [Standard Windows Keyboard Shortcuts](#)
- [Additional Keyboard Shortcuts](#)

Menu Access

The Desktop client software adds a number of menus and toolbars to some of the applications it integrates with. As is customary in Windows applications, each menu item has its own keyboard shortcut (Alt key plus a letter).

Context Menus

The Desktop client software provides context menus to provide options that are relevant to the current context of the application. For example, with content folder selected, it shows options that are applicable to that folder in that particular context. To show a context menu, right-click an object in the integration hierarchy or the content pane, or press the menu key on your keyboard.

Standard Windows Keyboard Shortcuts

The Desktop client software supports many standard Windows keyboard shortcuts, including:

- **Ctrl+C**: copy
- **Ctrl+X**: cut
- **Ctrl+V**: paste
- **Delete**: delete
- **F2**: rename
- **Shift+F10**: open the context menu for the selected item (this is the same as right-clicking the item)
- **Tab**: move to the next user interface element
- **Shift+Tab**: move to the previous user interface element

Additional Keyboard Shortcuts

You can use the following additional keyboard shortcuts in the Search panel of the Select Content dialog:

- **F5**: refresh the web browser form
- **F6**: move out of the web browser form

1.6 Setting Up the Desktop Client Software on Your Computer

This section explains the process of setting up the Desktop client software on computers running the Microsoft Windows operating system. It covers these topics:

- [Section 1.6.1, "Installation Considerations"](#)
- [Section 1.6.2, "Installation Process"](#)

- [Section 1.6.3, "Uninstalling a Previous Version of the Desktop Client Software"](#)
- [Section 1.6.4, "Installing the Latest Version of the Desktop Client Software"](#)
- [Section 1.6.5, "Manually Configuring the Notes.ini File"](#)
- [Section 1.6.6, "Setting Up Content Server Connections"](#)

1.6.1 Installation Considerations

Please note the following considerations with regard to setting up a client computer for use with Desktop:

- Your system administrator may set up the required Desktop software on your client computer for you. If you must do it yourself, contact your system administrator for instructions on where to obtain the Desktop client software installer.

If you have access to an Oracle WebCenter Content Server 11gR1 instance, you can find the Desktop client installer on the **My Downloads** page in the Content Server web interface (under **My Content Server**).

You can also obtain the Desktop distribution zip file from the downloads section at Oracle.com.

- The Desktop client software can communicate with Oracle WebCenter Content Server 11gR1 as well as Oracle Content Server 11gR1 and 10gR3. Other Content Server versions are not supported. Not all features of Desktop 11gR1 may be available if you are connecting to an Oracle Content Server version prior to 11gR1 (see ["What's New and Changed in This Guide"](#) on page -xi).
- The Desktop client software can communicate with Oracle Content Database (Oracle Content DB) 10gR1 (10.2).
- The Desktop client installer includes both the 32-bit and 64-bit versions of Desktop 11gR1. It will automatically install the 32-bit Desktop version on 32-bit Microsoft Windows and the 64-bit Desktop version on 64-bit Microsoft Windows.
- The Desktop client software must be installed using administrator-level permissions. If you do not have these permissions and you attempt to install the software, the registry settings will not be set up correctly and the software will not function properly. If you need assistance, contact your system administrator.
- The Desktop client installer includes 32-bit and 64-bit msi installers, which system administrators can extract to help them roll out Desktop 11gR1 on client computers more efficiently. For more information, see *Installing and Configuring Oracle WebCenter Content*.

1.6.2 Installation Process

Setting up the Desktop client software consists of the following steps:

1. [Uninstalling a Previous Version of the Desktop Client Software](#)
2. [Installing the Latest Version of the Desktop Client Software](#)
3. [Manually Configuring the Notes.ini File](#)
4. [Manually Configuring the Notes.ini File](#) (if required)
5. [Setting Up Content Server Connections](#)

1.6.3 Uninstalling a Previous Version of the Desktop Client Software

To completely uninstall the desktop integration client software:

1. Open Windows Control Panel.
2. Click the following link, depending on your operating system:
 - Windows XP: **Add or Remove Programs**
 - Windows Vista and Windows 7 (category view): **Uninstall a program** (under Programs)
 - Windows Vista and Windows 7 (icon view): **Programs and Features**
3. Select **Oracle WebCenter Content: Desktop** or **Oracle Content Server - Desktop Integration Suite**.
4. Do the following, depending on your operating system:
 - Windows XP: Click **Remove**.
 - Windows Vista and Windows 7: Right-click and choose **Uninstall**.The uninstall wizard is launched.
5. Click **Yes** when asked if you are sure that you want to remove the Desktop client software from your computer.
The software is removed from the client computer.
6. Restart your computer.

Note: If you uninstall and then reinstall the Desktop client software (for example, during an upgrade), all server connections that you set up earlier will continue to be available after reinstalling the software. Additionally, any files that were cached locally (see [Section 4.6, "Local Caching of Content Files"](#)) will continue to be available.

1.6.4 Installing the Latest Version of the Desktop Client Software

If there are no previous versions of the Desktop client software on your computer, you can install the current version of the Desktop 11gR1 client software.

To install the Desktop 11gR1 client software on your computer:

1. Contact your system administrator for instructions on where to obtain the Desktop client software installer.

If you have access to an Oracle WebCenter Content Server 11gR1 instance running the native 11g user interface, then you can find the Desktop client installer on the **My Downloads** page in the Content Server web interface (under **My Content**).

You can also obtain the Desktop distribution zip file from the downloads section at Oracle.com.

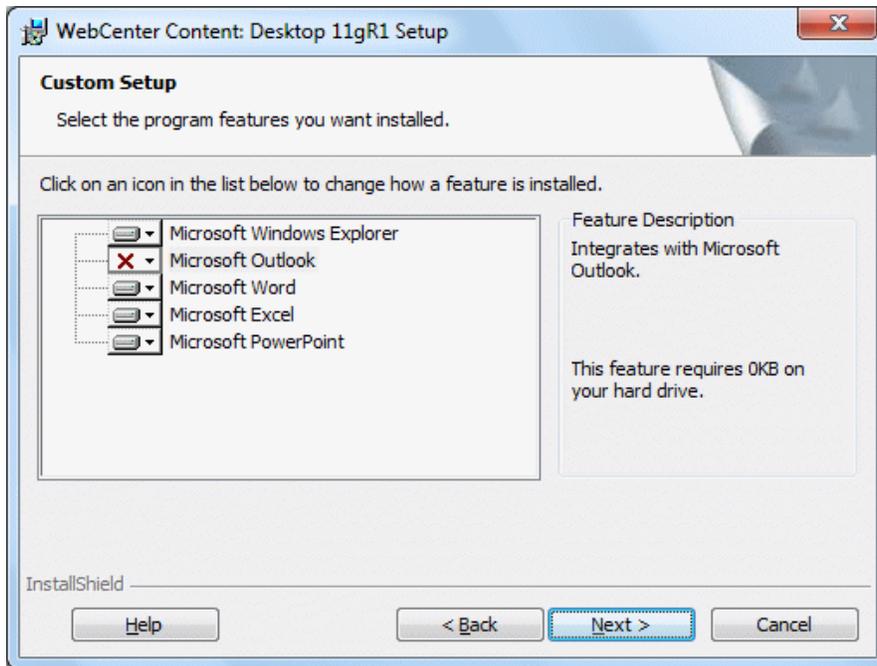
The Desktop client installer includes both the 32-bit and 64-bit versions of Desktop 11gR1. It will automatically install the 32-bit Desktop version on 32-bit Microsoft Windows and the 64-bit Desktop version on 64-bit Microsoft Windows.

2. After obtaining the client software, run the installer executable.
3. On the Welcome screen, click **Next** to start the installation.
4. Respond to any prompts from the installation wizard.

In the Custom Setup dialog, select the supported applications you want to integrate with content servers.

The list includes all supported applications that were detected on your local computer (see [Section 1.3, "Supported Client Applications"](#)). All applications are selected for integration by default. If you do not want to integrate an application with content servers, click its icon and choose "This feature will not be available" from the menu. The icon associated with the application then changes to a red X.

Figure 1–1 Selection of Applications to Integrate with Content Server



If you want to install the software to a different folder, click the **Change...** button and point to a different destination.

After you have verified the applications to integrate with as well as the software installation location, click **Next** to continue, or **Cancel** to exit the installation process.

5. If any of the applications that you want to integrate with a content server are currently running, a warning may be displayed stating that some Desktop features will not be available until the affected applications are restarted. Click **Next** to continue.

Note: If no Outlook accounts have been defined yet, no integration will be set up in Outlook, even if it was selected in the application selection dialog.

6. Click **Install** to start the installation.

All required files are copied.

When installing the Lotus Notes integration, you may receive an error message stating that the Notes.ini file could not be found. If you receive this error, first complete the installation and then follow the instructions in [Section 1.6.5, "Manually Configuring the Notes.ini File."](#)

7. After the installation has been completed, click **Finish** to exit the installation wizard.
8. It is recommended that you restart your computer.

1.6.5 Manually Configuring the Notes.ini File

If Lotus Notes is one of the applications selected for integration, then you must make some changes to the Notes.ini file. The Desktop client software installer attempts to make these changes automatically. If the installer is unable to do this, an error message is displayed, and you must make the changes manually.

To manually make the required changes to the Notes.ini file:

1. Locate the Notes.ini file. You will find this file in the following location:
 - **Windows XP:** *Lotus-Notes-App-Dir*\Notes.ini (for example, C:\Program Files\Lotus\Notes\Notes.ini)
 - **Windows Vista and Windows 7:** C:\Users*User-Name*\AppData\Local\VirtualStore*Lotus-Notes-App-Dir*\Notes.ini (for example, C:\Users\jsmith\AppData\Local\VirtualStore\Program Files\Lotus\Notes\Notes.ini)

Please note the following for Windows Vista and Windows 7:

- The Lotus Notes application directory also has a Notes.ini file, but this is not the file that needs to be modified.
- The AppData structure in Windows Vista and Windows 7 is hidden by default. You must enable the option to view hidden folders in Windows Explorer.
- If multiple users are using a client computer running Windows Vista or Windows 7, then the Notes.ini file needs to be modified for each user.

Consult your Notes administrator if you have trouble finding the Notes.ini file.

2. Open the Notes.ini file in a text editor.
3. Look for the AddInMenus entry.
 - If there is an AddInMenus entry, add STELNI . DLL to the end of the entry, separated by a comma, for example:

```
AddInMenus=FILE1 . DLL, FILE2 . DLL, STELNI . DLL
```
 - If there is no AddInMenus entry, add the following line to the end of the file:

```
AddInMenus=STELNI . DLL
```

(The last character of the DLL file name is the upper-case letter i, not the number 1.)

4. Save and close the Notes.ini file.

1.6.6 Setting Up Content Server Connections

After installing the Desktop client software on your computer, you must set up connections to all content servers that you want to access from your computer. For more information, see [Chapter 2, "Working with Content Server Connections."](#)

Note: You may not need to set up server connections for Desktop on your own computer, as this is often handled by system administrators.

Working with Content Server Connections

This section covers these topics:

- [Section 2.1, "About Content Server Connections"](#)
- [Section 2.2, "Content Server Types"](#)
- [Section 2.3, "Content Server Capabilities"](#)
- [Section 2.4, "Content Server URLs"](#)
- [Section 2.5, "Online vs. Offline Servers"](#)
- [Section 2.6, "Server Context Menus"](#)
- [Section 2.7, "Adding a Content Server Connection"](#)
- [Section 2.8, "Changing the Name of a Server Connection"](#)
- [Section 2.9, "Viewing Existing Content Server Connection URLs"](#)
- [Section 2.10, "Removing a Content Server Connection"](#)
- [Section 2.11, "Connecting to a Content Server"](#)
- [Section 2.12, "Logging Off From a Content Server"](#)
- [Section 2.13, "Working With a Content Server Offline"](#)
- [Section 2.14, "Setting Metadata To Be Remembered for Form-Based Check-Ins"](#)
- [Section 2.15, "Setting the Authentication Method"](#)
- [Section 2.16, "Identifying the URLs for Oracle WebCenter Content Server"](#)

2.1 About Content Server Connections

Before you can integrate content management features into your desktop experience, you must establish a connection with a server, so you can access the files on it. You can define server connections in any of the integrated applications (Windows Explorer, Microsoft Word, Microsoft PowerPoint, Microsoft Excel, Microsoft Outlook, or Lotus Notes). You only need to define a server connection once. When you create a new server connection, that connection will be available to all supported applications on your computer that you use to interact with the content server. Once you have defined a server connection, you can begin working with that server based on your server permissions.

If you add or remove a server connection, or change its display name, this only affects your own computer. The server settings are stored on your own computer; no other users are affected. Also, when you uninstall the Desktop client software from your computer and reinstall it (for example, to upgrade to a newer version), all previously

configured server connections will continue to be available after you reinstall the software.

Note: Your system administrator may decide to set up all content server connections for you.

2.2 Content Server Types

The Desktop client can connect to these types of servers:

- WebCenter Content Server:** This is an Oracle WebCenter Content Server instance, which offers the broadest content management integration: opening files directly from the server (check-out), saving files to the server (check-in), file versioning, searching for files on the server, comparing Microsoft Word documents on the server, and so on.

Oracle WebCenter: Desktop can work with both the new WebCenter Content user interface offered by WebCenter Content 11gR1 (11.1.1. 8.0) and the native 11g user interface offered by all WebCenter Content 11g releases.

This server type was called 'UCM Content Server' in earlier Desktop releases.

- Content DB Server:** This is an Oracle Content Database (Oracle Content DB) server. These servers offer some content management integration. You can open files directly from the server and save files to it, but you cannot search for files on the server using the Desktop client software.
- WebDAV Server:** This is a server that is not an Oracle WebCenter Content Server or Oracle Content Database server but which supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. (The WebDAV DeltaV extension is not supported.) These servers offer some content management integration. You can open files directly from the server and save files to it, but you cannot search for files on the server using the Desktop client software.

You select the content server type when you create the server connection (see [Section 2.7, "Adding a Content Server Connection"](#)). Consult your system administrator if you are not sure which server type to use.

Server Type Icons

Each server type has its own icon that visually identifies it in the integration hierarchy.

Server Icons	Server Type
	WebCenter Content Server instance
	Oracle Content Database (Oracle Content DB) server
	Other WebDAV server

2.3 Content Server Capabilities

The Desktop client software provides different content management features depending on the server type and configuration (see above), as outlined in the table below.

Content Management Capability	11gR1 Oracle WebCenter Content Server with Desktop 11gR1 components and Framework Folders	11gR1 Oracle Content Server with Desktop 11gR1 components and Folders_g	10gR3 Oracle Content Server with Desktop 11gR1 components	10gR3 Oracle Content Servers with Desktop 10gR3 components	Oracle Content DB Server	WebDAV Server
Standard Windows operations such as copy-and-paste, drag-and-drop, and create Windows shortcuts	yes	yes	yes	yes	yes	yes
Checking files out of the server	yes	yes	yes	yes	yes	yes
Checking files in to the server (copy-and-paste or drag-and-drop)	yes ⁽¹⁾	yes ⁽¹⁾	yes ⁽²⁾	yes ⁽²⁾	yes	yes
Checking files in to the server (check-in form)	yes	yes	yes	yes	no	no
Browsing to files on the server (navigation tree)	yes	yes	yes	yes	yes	yes
Searching for files on the server (search form)	yes	yes	yes	yes	no	no
Working with offline files on the server	yes	yes	yes	yes	yes	yes
Copying links to files on the server	yes	yes	yes	yes	yes	yes
Creating content server shortcuts to files and folders on the server	yes	yes	yes	yes	no	no
Propagating content server metadata to subfolders and files.	yes	yes	yes	yes	no	no
Choosing which metadata fields and values to propagate	yes	no	no	no	no	no
Working with query folders.	yes	no	no	no	no	no
Working with personal folders.	yes	no	no	no	no	no
Hiding unpublished files	yes	no	no	no	no	no

Content Management Capability	11gR1 Oracle WebCenter Content Server with Desktop 11gR1 components and Framework Folders	11gR1 Oracle Content Server with Desktop 11gR1 components and Folders_g	10gR3 Oracle Content Server with Desktop 11gR1 components	10gR3 Oracle Content Servers with Desktop 10gR3 components	Oracle Content DB Server	WebDAV Server
Changing folder association of items by dragging and dropping them to a different folder	yes	yes	no	no	no	no
Associate items not assigned to any content folder with a folder by dragging and dropping them to the target folder	yes	no	no	no	no	no
Inserting content files, file links, or images on the server into Microsoft Office documents	yes	yes	yes	yes	no	no
Choosing content profiles on search and check-in pages	yes	yes	no	no	n/a	n/a
Checking in files by dragging and dropping into profile node	yes	yes	no	no	no	no
Comparing a Word document with another file on the server	yes	yes	yes	yes	yes	yes
Comparing a Word document with an earlier file revision on the server	yes	yes	yes	yes	no	no
Seeing productivity nodes (My Checked-Out Content, My Workflow Assignments, My Saved Queries, etc.) in the integration hierarchy.	yes	yes	yes	no	no	no
Approving or rejecting workflow items directly in Windows Explorer (through context menu)	yes	yes	no	no	n/a	n/a
Interacting with the WebCenter Content user interface	yes ⁽³⁾	no	no	no	n/a	n/a

Notes

1. If any required metadata is missing, you may be prompted to provide it depending on the configuration settings for the folder.
2. If any required metadata is missing, the check-in operation will fail if no default folder metadata has been defined.
3. This requires a connection to Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher with Framework Folders and the latest Desktop 11gR1 integration component.

2.4 Content Server URLs

When creating a content server connection, you must provide the WebDAV URL for that server, and possibly its CGI URL (for Oracle WebCenter Content Server instances). If you want to connect to the WebCenter Content user interface on Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher, you must also provide the URL for that user interface. Each defined content server connection must have its own, unique WebDAV URL. You cannot have two server connections on your computer that use the exact same WebDAV URL.

Oracle WebCenter Content Server

Oracle WebCenter Content Server instances require both a WebDAV URL and CGI URL, and possibly a UI URL.

The **WebDAV URL** for content servers typically has the following form:

```
http[s]://host-name:[port]/web-root/idcplg/webdav
```

For example:

```
http://server:7044/idc/idcplg/webdav
http://server.example.com:16200/cs/idcplg/webdav
https://server/cs/idcplg/webdav
```

The **CGI URL** is typically the same as the WebDAV URL, without '/webdav', for example:

```
http://server:7044/idc/idcplg
http://server.example.com:16200/cs/idcplg
https://server/cs/idcplg
```

If the WebCenter Content user interface is being used, the **user interface URL** points to the server providing that user interface, for example:

```
http://server.example.com:16400/wcc/faces
```

See [Section 2.16, "Identifying the URLs for Oracle WebCenter Content Server"](#) for a way to find out what the URL of an Oracle WebCenter Content Server instance is. You can also ask your system administrator what URLs to use.

If clients should connect to an Oracle WebCenter Content Server 11gR1 instance using **basic authentication** rather than form-based authentication (that is, using a login dialog), then you can force basic authentication by adding '_dav' to the server's WebDAV and CGI URLs. In addition, HTTPS should be used. For example:

```
https://server.example.com:16200/_dav/cs/idcplg/webdav
https://server.example.com:16200/_dav/cs/idcplg
```

WebDAV and CGI URLs with '_dav' are not supported in Oracle Content Server 10gR3.

Oracle Content DB Servers and WebDAV Servers

Oracle Content DB servers and other WebDAV servers require only a **WebDAV URL**. What this URL looks like is entirely dependent on the server location and configuration. You may want to ask your system administrator what URLs to use.

Note: You may not need to set up server connections for Desktop on your own computer, as this is often handled by system administrators.

2.5 Online vs. Offline Servers

A content server can be in online or offline state. If a content server is **online**, there is a live connection to that server (after providing your login user name and password) and you can view and interact with the folders and files on the content server, based on your server permissions.

If a content server is **offline**, there is no live connection to the server, but you can still access the files from that server that are in your local cache (see [Section 4.6, "Local Caching of Content Files"](#)). You can specifically designate content files and entire folders to be available offline (see [Section 8.2, "Making Folders and Files Available Offline"](#)). Copies of the latest file revisions are then retrieved from the content server and put in the local cache on your computer. Working with a content server in offline mode may be useful if you want to access some files on that server when no connection to the server is available (for example, outside of the workplace). If a server is in offline mode, then the integration hierarchy for that server includes an **Offline Files** node, which provides easy access to all files on the server that you made available offline.

To work with a content server in offline mode, right-click that server in the integration hierarchy or the content pane, and choose **Work Offline** in the context menu. The server icon then changes to include an offline indicator ([Figure 2-1](#)). In addition, the **Work Offline** option in the server's context menu is preceded by a check mark. To cancel the offline status, simply select the **Work Offline** option in the context menu again.

Figure 2-1 Offline WebCenter Content Server



2.6 Server Context Menus

The Desktop context menus may include the following server-related options:

- **Open:** Opens the selected server in a new window, with the folders pane not visible (when selected in folders pane), or opens the selected server in the content pane (when selected in the content pane).
- **Search...** (Oracle WebCenter Content Server only): Opens a search form on the current content server where you can specify criteria and search for items on that server based on these criteria. For more information, see [Section 6.4, "Searching for Content Files."](#)

- **Show Quick Search** (Oracle WebCenter Content Server only): Shows or hides Oracle WebCenter Content Server's Quick Search feature in Windows Explorer. For more information, see [Section 5.9, "Quick Search Integration."](#)
- **Log Off:** Breaks the connection to the current content server. This means that you will have to provide your login credentials (user name and password) again the next time you want to access that server. For more information, see [Section 2.12, "Logging Off From a Content Server."](#)
- **Work Offline:** Disconnects you from the current content server. This means that you will only have access to the files on that server that have been marked to be available offline. For more information, see [Section 2.13, "Working With a Content Server Offline"](#) and [Chapter 8, "Working with Offline Content."](#)
- **Remove:** Enables you to remove the selected server connection from the integration hierarchy. For more information, see [Section 2.10, "Removing a Content Server Connection."](#)
- **Properties:** Opens a dialog which shows a number of properties of the current content server. For more information, see [Section 2.9, "Viewing Existing Content Server Connection URLs."](#)
- **Add Server...:** Opens a dialog where you can add a new content server connection to the integration hierarchy. For more information, see [Section 2.7, "Adding a Content Server Connection."](#)
- **Save Query:** Saves the current search query in your list of saved queries (see ["My Saved Queries"](#) on page 3-8). This enables you to quickly perform the search query again to see the latest dynamic search results. (Not available for servers using the WebCenter Content user interface.)
- **View Query Definition:** Opens a dialog that shows the query statement for the selected saved query. (Not available for servers using the WebCenter Content user interface.)

2.7 Adding a Content Server Connection

When you add a server connection to your integration hierarchy, you can connect to that server and work with the content on it.

To add a new content server connection:

1. Windows Explorer:

Select the top-level integration folder ("WebCenter Content Servers") in your navigation pane, right-click, and choose **Add Server...** in the context menu. You can also right-click in an unused area of the content pane (that is, away from any of the items listed in it).

or

Open the **File** menu and choose **Add Server...**

The Add Server dialog opens.

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List**. (The Edit Server List option may be on an Options drop-down list.)

The Edit Server List dialog opens.

- b. Choose **New...**

The Add Server dialog opens.

Microsoft Outlook and Lotus Notes:

- Select the WebCenter Content Servers node in the folders pane, then move the mouse cursor to an unused area in the content pane (that is, away from any of the items listed in it), then right-click, and choose **Add Server...** in the context menu.

The Add Server dialog opens.

Lotus Notes:

Open the **Actions** menu and choose **Email Integration Settings....**, then **Edit Server List**, and then **New...**

The Add Server dialog opens.

2. In the **Server Name** text box, enter the name for the new server connection. This is the name that is displayed in the integration hierarchy. You can use any name as long as it is not already used for another server.
3. Select the type of content server in the **Server Type** list:
 - WebCenter Content Server
 - Content DB Server
 - WebDAV Server

For more information, see [Section 2.2, "Content Server Types."](#) Contact your system administrator if you are not sure which server type to use.

4. In the text box under **Server WebDAV URL**, enter the URL for your WebDAV server. This information is needed to access the resources provided by your WebDAV server.

A URL is automatically inserted using the name you specified as the server name. You may need to modify this information to suit your particular server. Contact your system administrator if you do not know exactly what WebDAV URL to use. See also [Section 2.4, "Content Server URLs"](#) and [Section 2.16, "Identifying the URLs for Oracle WebCenter Content Server."](#)

Note: Each defined content server connection must have its own, unique WebDAV URL. You cannot have two server connections on your computer that use the exact same WebDAV URL.

5. In the text box under **CGI URL**, enter the CGI URL for your content server.

A URL is automatically inserted using the name you specified as the server name. You may need to modify this information to suit your particular server. Contact your system administrator if you do not know exactly what CGI URL to use. See also [Section 2.4, "Content Server URLs"](#) and [Section 2.16, "Identifying the URLs for Oracle WebCenter Content Server."](#)

The CGI URL section is not available for content servers of type "Content DB Server" and "WebDAV Server," since they do not use a CGI URL.

6. In the text box under **User Interface URL**, if you want to use the WebCenter Content user interface, you must enter the URL of the server that provides the resources for this user interface, which is available for Oracle WebCenter Content

Server 11gR1 (11.1.1.8.0) or higher. Contact your system administrator if you do not know exactly what URL to use here.

7. If you want the server connection to use single sign-on (SSO), select the **Use Single Sign-On** check box and provide the URL of the single sign-on (SSO) server that is used to control access to the content server. Contact your system administrator if you are not sure whether you should select this option.

The SSO section is not available for Oracle WebCenter Content Server instances.

8. Click **Options** to open the Server Options dialog for Oracle WebCenter Content Server instances, where you can set the authentication method for the server as well as the metadata fields whose values should be remembered for new check-ins. Click **OK** when you are done.
9. Click **OK** in the Add Server dialog.

The new server connection is now added to the integration hierarchy (under "WebCenter Content Servers"), and is available to all other integrated applications.

Adding a Connection from the Content Server Web Interface

You can also add a connection to an Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher instance directly from its WebCenter Content user interface (if enabled):

1. Open your web browser and log in to the WebCenter Content user interface. Ask your system administrator if you do not know what URL to use.
2. Open your user menu and choose **Add Server to Desktop Integration**.
3. Enter a server name and click **Add Server**.

The server connection is created automatically in the WebCenter Content Server hierarchy using the correct WebDAV, CGI, and user interface URLs, and you can interact with the server from your desktop applications.

Considerations

Please note the following with regard to content server connections:

- When you add a new server connection, it is available on your own computer only, not on any other user's computer.
- When you create a new server connection, that connection will be available to all supported applications on your computer that you use to interact with the content server.
- If you uninstall and then reinstall the Desktop software (see [Section 1.6.4, "Installing the Latest Version of the Desktop Client Software"](#)), any server connections that you set up earlier will continue to be available after reinstalling the software.

2.8 Changing the Name of a Server Connection

In Windows Explorer, you may change the name of a server connection if no content items on the server are currently in your local cache (see [Chapter 4.6, "Local Caching of Content Files"](#)). If you modify the name, it is updated automatically in the WebCenter Content Servers integration hierarchy.

To change the name of an existing content server connection:

1. In Windows Explorer, select a content server in the WebCenter Content Servers integration hierarchy.
2. Right-click and choose **Properties** in the context menu.
The Server Properties dialog opens.
3. In the Name box, enter the new name for the server connection.
4. Click **OK** when you are done.

2.9 Viewing Existing Content Server Connection URLs

Note: You cannot edit any of the URLs of an existing server connection. If you need to modify a server URL, you should remove the server connection and re-create it using the new URL.

To view the URLs of an existing content server connection:

1. **Windows Explorer:**
 - a. Select a content server in the WebCenter Content Servers integration hierarchy.
 - b. Right-click and choose **Properties** in the context menu.

The Server Properties dialog opens.

The URL shown in this dialog is the Server WebDAV URL. To see the other URLs (if any), use the procedure for Microsoft Office applications.

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List...** (The Edit Server List option may be on an Options drop-down list.)
The Edit Server List dialog opens.
 - b. Select the server whose connection properties you want to view, and choose **View...**
The Edit Server dialog opens.
All URLs used for the server connection are shown on this dialog.
2. Click **OK** or **Close** on each of the open dialogs when you are done.

2.10 Removing a Content Server Connection

When you remove a server connection from the integration hierarchy, you can no longer work with the content on that server from your desktop applications.

To remove a server connection:

1. **Windows Explorer:**
 - a. Select a content server in the WebCenter Content Servers integration hierarchy in your folders pane.
 - b. Right-click and choose **Remove** in the context menu. Alternatively, you can press **Delete** on your keyboard.

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List....** (The Edit Server List option may be on an Options drop-down list.)
The Edit Server List dialog opens.
 - b. Select the server connection that you want to remove, and choose **Delete**.
2. Click **Yes** to confirm.

The server is automatically removed from the WebCenter Content Servers integration hierarchy and is no longer available in all integrated applications on your computer. Only the server connection is removed; no content files are deleted from the actual server.

2.11 Connecting to a Content Server

In order to access a content server from one of the supported desktop applications, you need to establish a connection to that server. To do so, select the content server in the integration hierarchy. You are then typically prompted to provide your login credentials (that is, your user name and password). Once you enter this information, you are able to view and interact with the files on the content server.

You will typically see a login web form or a login dialog, depending on the authentication scheme used for the content server. In either case, provide your assigned user name and password to gain access to the files on the server.

Note: You may be logged off a content server automatically if there is no activity for a certain period of time.

2.12 Logging Off From a Content Server

When you are finished interacting with a content server, you may wish to break the server connection (log off). To log off a content server, right-click that server in the WebCenter Content Servers integration hierarchy and choose **Log Off** in the context menu. You can then no longer access the content on the server until you log back on.

To log on to a server after you logged off, click the server in the WebCenter Content Servers hierarchy. When prompted, enter your user name and password. (Depending on the authentication scheme and the content server configuration, you may not be prompted for your logon information.)

Note: You may be logged off a content server automatically if there is no activity for a certain period of time.

2.13 Working With a Content Server Offline

You can work with a content server in offline mode. This means that you cannot directly access any files on the server, but you can work with files from the server that are currently in your local cache. For more information, see [Section 2.5, "Online vs. Offline Servers"](#) and [Chapter 4.6, "Local Caching of Content Files."](#)

To work with a content server in offline mode, right-click that server in the integration hierarchy or the content pane, and choose **Work Offline** in the context menu. The server icon then changes to include an offline indicator ([Figure 2–2](#)). In addition, the **Work Offline** option in the server's context menu is preceded by a check mark. To

cancel the offline status, simply select the **Work Offline** option in the context menu again.

Figure 2–2 Offline Oracle WebCenter Content Server



Once a server is offline, it has an **Offline Files** node, which provides easy access to all files on the server that you made available offline.

See also [Chapter 8, "Working with Offline Content."](#)

2.14 Setting Metadata To Be Remembered for Form-Based Check-Ins

For each server connection, you can set the metadata that will be "remembered" each time you check in a content item using a content check-in form. As a result, at each check-in, the metadata values you used at the last check-in will pre-populate the metadata fields configured to be remembered (assuming these values are available). If you enter new values in the metadata fields, the new ones will be used for the file (and also remembered for the next form-based check-in).

You can set the metadata fields to be remembered for a server when you initially create a connection to that server (see [Section 2.7, "Adding a Content Server Connection"](#)), or you can modify this setting later.

To set the metadata fields to be remembered for a server:

1. In **Microsoft Word, PowerPoint, and Excel**, open the **WebCenter Content** menu or ribbon, and choose **Edit Server List...** (The Edit Server List option may be on an Options drop-down list.)

In **Microsoft Outlook**, open the **WebCenter Content** menu or ribbon, select **Email Integration Settings**, then click the **Edit Server List** button.

Note: You cannot modify this setting in **Windows Explorer** once you have created a server connection. If you want to modify the metadata to be remembered for a server, you must change the setting in Microsoft Office.

The Edit Server List dialog opens.

2. Select the server for which you want to set the metadata to be remembered, and click **View...**

The Edit Server dialog opens.

3. Click **Options...**

The Server Options dialog opens.

4. Open the **Remember Metadata Fields** tab, and move the metadata fields whose values should be remembered between check-ins from the left column ("Available Metadata Fields") to the right column ("Selected Metadata Fields").

5. Close all dialogs.

This setting takes effect immediately.

2.15 Setting the Authentication Method

For each server connection, you can set the authentication method that is used when you log on to the server. The authentication method is set up by the content server administrator and there is generally no need to change the default on your client computer unless specifically asked to do so.

You can set the authentication method for a server when you initially create a connection to that server (see [Section 2.7, "Adding a Content Server Connection"](#)), or you can modify it later.

To set the authentication method for a server:

1. In **Microsoft Word, PowerPoint, and Excel**, open the **WebCenter Content** menu or ribbon, and choose **Edit Server List...** (The Edit Server List option may be on an Options drop-down list.)

In **Microsoft Outlook**, open the **WebCenter Content** menu or ribbon, select **Email Integration Settings**, then click the **Edit Server List** button.

Note: You cannot modify this setting in **Windows Explorer** once you have created a server connection. Should you need to change the authentication method of a server, you must change the setting in Microsoft Office.

The Edit Server List dialog opens.

2. Select the server for which you want to set the authentication method, and click **View...**

The Edit Server dialog opens.

3. Click **Options...**

The Server Options dialog opens.

4. Open the **Authentication** tab, and select the authentication method to be used. Contact your content server administrator if you are not sure which authentication method to use.
5. Click **OK** to close the Server Options dialog, and **OK** to close the Edit Server dialog.

This setting takes effect immediately.

2.16 Identifying the URLs for Oracle WebCenter Content Server

When creating a content server connection, you must provide the WebDAV URL for that server and possibly its CGI URL (depending on the server type). See [Section 2.4, "Content Server URLs"](#) for information on what these URLs typically look like.

If you are already accessing an Oracle WebCenter Content Server instance through your web browser, you see its CGI URL in the address bar and you can use this information to set up your server connection in Desktop. It is the web address from the beginning up to, but not including, the question mark (?), as shown in [Figure 2-3](#). The WebDAV URL is typically the CGI URL plus '/webdav' appended to it.

Figure 2-3 CGI URL of Oracle WebCenter Content Server



You can copy and paste the URL in the address bar to the URL fields in the Add Server dialog. Each defined content server connection must have its own, unique WebDAV URL. You cannot have two server connections on your computer that use the exact same WebDAV URL.

If you are using your web browser to connect to the WebCenter Content user interface offered by Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher, you can also see all required URLs for Desktop by opening your user menu and clicking **Add Server to Desktop Integration**. (You can click **Add Server** to automatically add a connection for that server to the Desktop integration hierarchy.)

Contact your content server administrator if you have any problems determining the server URLs.

Understanding the Integration Hierarchy

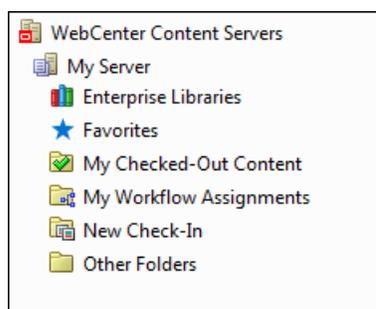
This section covers these topics:

- [Section 3.1, "About the Integration Hierarchy"](#)
- [Section 3.2, "Top-Level Node \("WebCenter Content Servers"\)"](#)
- [Section 3.3, "Content Server Nodes"](#)
- [Section 3.4, "Oracle WebCenter Content Server Repositories"](#)
- [Section 3.5, "Oracle Content Database Repositories"](#)
- [Section 3.6, "WebDAV Server Repositories"](#)

3.1 About the Integration Hierarchy

The integration hierarchy provides a tree-like structure that enables you to interact with content servers and the files on them in a convenient, familiar desktop environment ([Figure 3-1](#)). It is fully integrated into Windows Explorer and the supported email applications Microsoft Outlook and Lotus Notes (although Lotus Domino release 8 mail templates will not show the WebCenter Content Servers node in the folders pane). It is not available in Microsoft Office applications, where you use menus, toolbars, and ribbons to work with content servers and their files.

Figure 3-1 Example of Integration Hierarchy with One Oracle WebCenter Content Server Connection (Fully Expanded)



If you do not see the folders pane in Windows Explorer or your email application, you need to turn it on. For example, in Windows Explorer on Windows 7, choose **Organize**, then **Layout**, and then **Navigation Pane**. Also, you may need to enable the integration hierarchy in your email application as it is not displayed by default (see ["Showing the WebCenter Content Servers Hierarchy"](#)).

When you open a content folder, you see all files on the server in that folder for which you have access privileges. You can perform content management tasks, such as checking out or copying a file, directly from this list.

The "files" in the content folders are not actual files on your local computer, but rather they are symbolic links or pointers to content items in the content server repository, each with a full revision history. You work with content managed on a content server (the "files") in much the same way you do with other folders and files on your computer. You can copy files, drag and drop files into folders, right-click objects to open context menus, and so on. However, some tasks typically performed on files or folders on your local computer may have a different effect when performed on files and folders managed by a content server. For example, copying a file or saving an email message to a content folder does not put it on your local computer, but rather uploads and saves it on the content server. In addition, the context menus of files may include items specific to content management, such as Check In, Check Out, Copy Links, and so on.

The user logins and security controls on a content server also apply to files and folders that are managed through the integration hierarchy. For example, if you have only read permission for a content item, you will be able to open a copy of the native file, but you will not be able to check a new revision of the file in to the content server (which requires write permission). Similarly, when you create a new folder in the folder hierarchy on the server, each person who has the rights to view that folder will see it on their local computer. The files you add to the folder will also be available to each user on the content server, again according to their security permissions.

3.2 Top-Level Node ("WebCenter Content Servers")

The top-level node in the integration hierarchy is always called "WebCenter Content Servers." You cannot modify its name nor can you delete this node. You may need to enable its display in your email application as it is not displayed by default (see ["Showing the WebCenter Content Servers Hierarchy"](#)).

With the top-level WebCenter Content Servers node in the integration hierarchy selected, the content pane shows all defined content server connections. How the information is displayed depends on the view mode: icons, lists, details, etc. The icon of each server denotes its type (see [Section 2.2, "Content Server Types"](#)).

3.3 Content Server Nodes

The content server nodes are immediately below the top-level WebCenter Content Servers node in the integration hierarchy. They represent the defined server connections. You can select a content server to connect and log in to that server. Depending on the server configuration and current login status, you may be prompted to provide your login credentials for that server (your user name and password).

The display name of each server in the integration hierarchy is the name as provided in the Add Server dialog when the server connection was created (see [Section 2.7, "Adding a Content Server Connection"](#)). You can change the server name through the Server Properties dialog (unless you have checked out any files or made any files available offline).

The icon for each server in the integration hierarchy denotes its type (see [Section 2.2, "Content Server Types"](#)). The available nodes and folders in a server tree depend on the server type and configuration:

- [Oracle WebCenter Content Server Repositories](#) (see [Section 3.4](#))

- [Oracle Content Database Repositories](#) (see [Section 3.5](#))
- [WebDAV Server Repositories](#) (see [Section 3.6](#))

3.4 Oracle WebCenter Content Server Repositories

The Desktop client software provides direct access to content on Oracle WebCenter Content Server instances. This server type is represented in the integration hierarchy using the icon shown in [Figure 3–2](#).

Figure 3–2 Icon for Oracle WebCenter Content Server



The nodes included in the integration hierarchy of Oracle WebCenter Content Server instances depend on the Content Server version and configuration. Unless noted otherwise, this book assumes you are connecting to an Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher instance, which offers two user interfaces, each with its own integration hierarchy:

- [WebCenter Content User Interface](#) (see [Section 3.4.1](#))
- [Native 11g User Interface](#) (see [Section 3.4.2](#))

See *Using Oracle WebCenter Content* for more information on each of these user interfaces. Oracle WebCenter Content Server releases prior to 11gR1 (11.1.1.8.0) offer only the native 11g user interface.

The integration hierarchy on an Oracle WebCenter Content Server instance enables you to work with content on that server using the familiar folders structure used in Windows Explorer and email applications. You see only libraries, folders, and files for which you are assigned access privileges on the server.

For more information about using content folders and the files in them, see [Chapter 6, "Working with Managed Content Files in Windows Explorer."](#)

If you select a library or folder in the integration hierarchy, the content pane shows all items in that library or folder (although unpublished items may be hidden). How the information is displayed depends on the view mode: icons, lists, details, etc.

If you select the Search Results folder, the content pane shows all content items on the server that meet the search criteria of the most recent query (subject to any limit that has been set to the number of results shown).

The icons of managed files in a content folder show their associated applications (for example, Microsoft Word for .doc or .docx files) as well as their content management status (in the form of application icon overlays), if applicable. For more information, see [Section 4.8, "Content File Status."](#)

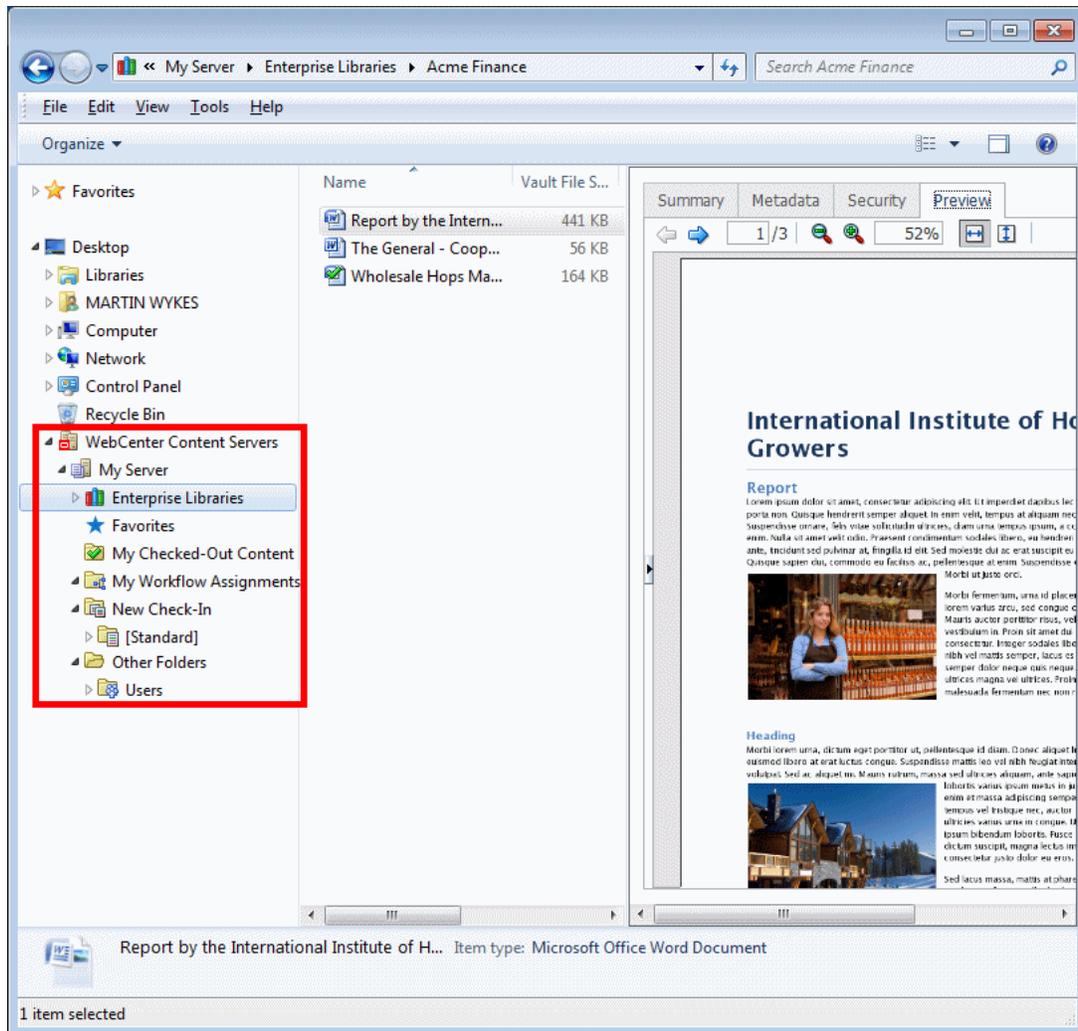
If an object is selected in the content pane, the preview pane shows information about that object from the content server (for example, general information for a library, or summary information for a file).

3.4.1 WebCenter Content User Interface

The WebCenter Content user interface may be available if you are connecting to Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher. Earlier Content Server versions do not offer this user interface. If you want to use the WebCenter Content user

interface when connecting to a server, you must specify its URL when setting up the server connection (see [Section 2.7, "Adding a Content Server Connection"](#)).

Figure 3–3 Oracle WebCenter Content Server 11gR1 Instance in Integration Hierarchy (WebCenter Content User interface)



If you are connecting to a WebCenter Content Server 11gR1 (11.1.1.8.0) or higher instance running the WebCenter Content user interface, then the integration hierarchy will include the following main nodes:

- [Enterprise Libraries](#)
- [Favorites](#)
- [My Checked-Out Content](#)
- [My Workflow Assignments](#)
- [New Check-In](#)
- [Other Folders](#)
- [Offline Files](#)
- [Search Results](#)

3.4.1.1 Enterprise Libraries

Organizing documents in libraries helps to ensure documents are secure, can be shared, and are easily found by yourself and others.

Enterprise libraries list the folders, subfolders, and content items used by everyone on the selected server. You will see only items for which you have access privileges.

You need extended privileges to create enterprise libraries.

You create enterprise libraries to provide flexible security and comprehensive document management for an entire organization. Enterprise libraries offer a comprehensive document revision history, a detailed security model per document, and a full range of metadata options and control.

To create a library, see [Section 6.2, "Creating Enterprise Libraries."](#)

To create a folder within a library, see [Section 6.3, "Creating Content Folders."](#)

Note: See *Using Oracle WebCenter Content* for more information about libraries.

3.4.1.2 Favorites

The Favorites node lists all libraries, folders, and documents you have specified as favorites. You will not see any favorites chosen by other people, unless you have also chosen them as a favorite.

You add an item to your Favorites folder by right-clicking the item and choosing **Favorite**.

3.4.1.3 My Checked-Out Content

The My Checked-Out Content node lists all content files that you currently have checked out of the server. You see only files that you have checked out yourself, not files checked out by others.

The checked-out status of a content item is indicated by a green check mark, overlaid on the application icon for the file type (see also [Section 4.8, "Content File Status"](#)).

Table 3–1 Status Icons for Content Items

Icon	Description
	<p>This icon is used to indicate that you have currently checked out the content item. The versions of your locally cached copy and the original file on the content server match; that is, no changes have been made to either version since the file was checked out.</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>
	<p>This icon is used to indicate that you have currently checked out the content item. However, the versions of your locally cached copy and the original file on the content server do not match; more specifically, the modified timestamp of the file in your local cache has changed. This will typically be the case if you checked out a file, made changes to it, but did not yet check it back in to the content server. The icon provides a visual reminder for this.</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>

3.4.1.4 My Workflow Assignments

The My Workflow Assignments node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all content files in a workflow on that particular server that you are assigned to review and then approve or reject. You see only workflow assignments for yourself, not for others. You can approve or reject the items directly in this list (see [Section 7.3, "Approving or Rejecting Files in Workflows"](#)).

The My Workflow Assignments list in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'My Content Server').

See *Using Oracle WebCenter Content* for more information about workflows and also [Chapter 7, "Working with Managed Content in Workflows."](#)

3.4.1.5 New Check-In

The New Check-In node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all content profiles defined on the server. Content profiles allow content server administrators to control what metadata fields are shown on content pages (including the check-in form) and to set default metadata for files depending on their application type. See *Using Oracle WebCenter Content* for more information about content profiles.

When you double-click a content profile (or select it and press Enter), you see a list of all content items on the server that were checked in using that profile. You will see only content items for which you have access privileges on the server. You can perform content management tasks directly from this list, such as checking out or copying a file. You can also drag-and-drop or copy-and-paste files to a content profile in the list to check that file in to the server using that profile (you will be prompted for metadata if required). This allows you to check in a file without using the folder hierarchy.

In addition to the defined content profiles on a server, the list will always include a '[Standard]' node, which represents no profile. You cannot remove this default profile.

3.4.1.6 Other Folders

The Other Folders node lists folders and content on the server not listed elsewhere.

Depending on the content server configuration (specifically, the folders component that is running), there may be a Users folder under Other Folders. This folder contains the personal folders for all authenticated users on the server, but you see only your own personal folder (unless you have administrative server privileges).

You can create folders beneath your personal folder. See [Section 6.3, "Creating Content Folders."](#)

3.4.1.7 Offline Files

If a content server is in offline mode, its integration hierarchy includes a node called Offline Files, which lists all files on that server that are in offline mode, including those that are not in a content folder. You can interact with these files directly from the list. For more information, see [Chapter 8, "Working with Offline Content."](#)

3.4.1.8 Search Results

The Search Results folder in the integration hierarchy of an Oracle WebCenter Content Server instance lists all files on that server that meet the criteria of the search query that was most recently performed. You see only files for which you were assigned access privileges on the server.

You can interact with content items in the search results list just as you could any other content item on the server (see [Chapter 6, "Working with Managed Content Files in Windows Explorer"](#)):

- You can open and view content items.
- You can check out and check in items.
- You can use the Summary, Metadata, Sharing, and Preview tabs in the preview pane.
- You can remove items from your folders but leave them on the content server. When you remove an item from the Search Results folder, it is also removed from the folder in which it is stored.
- You can delete items from the content server, at the same time as removing them from your folders.

You can drag and drop the Search Results node (while holding the Ctrl key) to a content library or folder to create a dynamic query folder (see [Section 6.5, "Working with Saved Search Queries and Query Folders"](#)).

You can view one set of search results at a time, for each server you are connected to through the integration hierarchy. The results of the last search you entered while you were in the Windows Explorer or email application session are shown. When you close the session by closing the window, the search results list is cleared.

3.4.2 Native 11g User Interface

The native 11g user interface is the only interface available for Content Server versions prior to 11gR1 (11.1.1.8.0). Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher offers both the native 11g user interface and the WebCenter Content user interface. You select which one to use when setting up the server connection.

If you are connecting to a WebCenter Content Server instance running the native 11g user interface, then the integration hierarchy will include the following main nodes:

- [My Content Server](#)
- [New Check-In](#)
- [Browse Content](#)
- [Offline Files](#)
- [Search Results](#)

The look of the integration hierarchy for a Content Server instance may further differ depending on the active folders component on the server (Framework Folders, Folders_g, or Folders).

3.4.2.1 My Content Server

The My Content Server node provides a number of personalized views of the content on the server. It includes the following subnodes:

- [My Checked-Out Content](#)
- [My Workflow Assignments](#)
- [My Saved Queries](#)
- [My Folders](#)

My Checked-Out Content

The My Checked-Out Content node lists all content files that you currently have checked out of the server. You see only files that you have checked out yourself, not files checked out by others.

The My Checked-Out Content list in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'My Content Server').

The checked-out status of a content item is indicated by a green check mark, overlaid on the application icon for the file type (see also [Section 4.8, "Content File Status"](#)).

Table 3–2 Status Icons for Content Items

Icon	Description
	<p>This icon is used to indicate that you have currently checked out the content item. The versions of your locally cached copy and the original file on the content server match; that is, no changes have been made to either version since the file was checked out.</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>
	<p>This icon is used to indicate that you have currently checked out the content item. However, the versions of your locally cached copy and the original file on the content server do not match; more specifically, the modified timestamp of the file in your local cache has changed. This will typically be the case if you checked out a file, made changes to it, but did not yet check it back in to the content server. The icon provides a visual reminder for this.</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>

My Workflow Assignments

The My Workflow Assignments node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all content files in a workflow on that particular server that you are assigned to review and then approve or reject. You see only workflow assignments for yourself, not for others. You can approve or reject the items directly in this list (see [Section 7.3, "Approving or Rejecting Files in Workflows"](#)).

The My Workflow Assignments list in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'My Content Server').

See *Using Oracle WebCenter Content* for more information about workflows and also [Chapter 7, "Working with Managed Content in Workflows."](#)

My Saved Queries

The My Saved Queries node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all search queries that you performed on that server and decided to save. Each saved query is dynamic, which means that every time you run it, the content pane shows all items that meet the search criteria at that particular moment. In other words, your saved queries will always produce the latest search results.

The My Saved Queries list in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'My Content Server'). A saved query is saved on the content server and is also available from the content server web interface.

Double-click a saved query (or select it and press Enter) to execute the query and display a search results list in the content pane containing all items on the content server that meet the search criteria. It is important to note that the items in the search

results list are the actual files, not copies or pointers of some sort. That is why you may see the content displayed in multiple places, such as in a content folder and in the search results list. You can interact with content items in the search results list just as you could any other content item on the server. For example, you can conveniently open, view, check out, and check in content items in the list (see [Chapter 6, "Working with Managed Content Files in Windows Explorer"](#)). You can remove a file from view in the search results list, but if you also choose to delete the file, you are removing the actual content item from the content server.

You can right-click a saved query to view (and modify, if required) its query definition. See the Oracle WebCenter Content Server documentation for more information on the query format.

You can also drag and drop a saved query to anywhere within the content folders tree under Browse Content. This creates a query folder, which is a dynamic folder that always contains all content items on the server that meet the search criteria and for which you have access privileges on the server (subject to any limit that has been set to the number of results shown). The default query folder name is 'Search Results' (or a 'Copy of' variant if this already exists), but you can rename it afterwards.

See [Section 6.5, "Working with Saved Search Queries and Query Folders"](#) for more information.

My Folders

The My Folders node in the integration hierarchy of an Oracle WebCenter Content Server instance shows the personal folders tree that you created on that server. All authenticated users on the content server have their own personal folders tree, but your personal folders tree is visible only to you. The tree under My Folders is identical to your personal folders under Browse Content, Users (if present). You can create subfolders and add files to your personal folders in the same way you do with other folders in the hierarchy. You can also store query folders in your personal folders tree. Your personal folders provide quick and convenient access to items on the content server.

It is important to note that all content items in your personal folders are the actual files, not copies or pointers of some sort. You can interact with content items in your personal folders just as you could any other content item on the server. If you delete a file from a personal folder, you are removing the actual content item from the content server.

See [Section 6.22, "Working with Your Personal Folders"](#) for more information.

3.4.2.2 New Check-In

The New Check-In node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all content profiles defined on the server. Content profiles allow content server administrators to control what metadata fields are shown on content pages (including the check-in form) and to set default metadata for files depending on their application type. See *Using Oracle WebCenter Content* for more information about content profiles.

When you double-click a content profile (or select it and press Enter), you see a list of all content items on the server that were checked in using that profile. You will see only content items for which you have access privileges on the server. You can perform content management tasks directly from this list, such as checking out or copying a file. You can also drag-and-drop or copy-and-paste files to a content profile in the list to check that file in to the server using that profile (you will be prompted for metadata if required). This allows you to check in a file without using the folder hierarchy.

In addition to the defined content profiles on a server, the list will always include a '[Standard]' node, which represents no profile. You cannot remove this default profile.

3.4.2.3 Browse Content

The Browse Content node contains the content folders tree as defined on the content server. Depending on the active folders component on the server and the server configuration, the content folders may be displayed immediately below the Browse Content node, or there may be an intermediate node called Contribution Folders or Content Folders.

Depending on the content server configuration (specifically, the folders component that is running), there may also be a Users folder under Browse Content. This folder contains the personal folders for all authenticated users on the server, but you see only your own personal folder (unless you have administrative server privileges). Your personal folders tree under Users is identical to the one under My Folders (see "[My Folders](#)" on page 3-9).

Note: Depending on the content server version and configuration, there may also be Projects and Trash nodes under Browse Content, which show all defined collaboration projects on the server and all content items that you recently deleted on the server, respectively.

3.4.2.4 Offline Files

If a content server is in offline mode, its integration hierarchy includes a node called Offline Files, which lists all files on that server that are in offline mode, including those that are not in a content folder. You can interact with these files directly from the list. For more information, see [Chapter 8, "Working with Offline Content."](#)

3.4.2.5 Search Results

The Search Results folder in the integration hierarchy of an Oracle WebCenter Content Server instance lists all files on that server that meet the criteria of the search query that was most recently performed. You see only files for which you were assigned access privileges on the server. You can interact with content items in the search results list just as you could any other content item on the server. For example, you can open, view, check out, and check in content items in the folder (see [Chapter 6, "Working with Managed Content Files in Windows Explorer"](#)). You can also view the content information page and make changes to the assigned metadata, if necessary.

It is important to note that the items in the search results list are the actual files, not copies or pointers of some sort. That is why you may see the content displayed in multiple places, such as in a content folder and in the search results list. You can remove a file from view in the search results list, but if you also choose to delete the file, you are removing the actual content item from the content server.

You can save your most recent search query by right-clicking the Search Results node in the integration hierarchy and choosing **Save Query**. This adds the query to the My Saved Queries list (see "[My Saved Queries](#)" on page 3-8), where you can easily run the query again. You can also drag and drop the Search Results node (while holding the Ctrl key) to My Saved Queries or to a content folder to create a dynamic query folder (see [Section 6.5, "Working with Saved Search Queries and Query Folders"](#)).

You can view one set of search results at a time, for each server you are connected to through the integration hierarchy. The results of the last search you entered while you were in the Windows Explorer or email application session are shown. When you close the session by closing the window, the search results list is cleared.

3.5 Oracle Content Database Repositories

The Desktop client software provides direct access to content on Oracle Content Database (Oracle Content DB) servers. This server type is represented in the integration hierarchy using the icon shown in [Figure 3-4](#).

Figure 3-4 Icon for Oracle Content Database (Oracle Content DB)



The integration hierarchy for Oracle Content Database servers shows the folder structure as defined on the content server. You see only folders and files for which you were assigned access privileges on the server. See the Oracle Content Database documentation for more information on working with repositories of this type.

3.6 WebDAV Server Repositories

In addition to Oracle WebCenter Content Server and Oracle Content Database repositories, the Desktop client software provides direct access to files on any content server that supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. (The WebDAV DeltaV extension is not supported.) This server type is represented in the integration hierarchy using the icon shown in [Figure 3-5](#).

Figure 3-5 Icon for WebDAV Servers



The integration hierarchy for WebDAV servers shows the folder structure as defined on the server. You see only folders and files for which you were assigned access privileges on the server.

Understanding Enterprise Libraries, Folders, and Files

This section covers these topics:

- [Section 4.1, "About Enterprise Libraries"](#)
- [Section 4.2, "About Content Folders and Files"](#)
- [Section 4.3, "Content Folder Metadata Inheritance and Propagation"](#)
- [Section 4.4, "Content File Versioning"](#)
- [Section 4.5, "Content File Metadata"](#)
- [Section 4.6, "Local Caching of Content Files"](#)
- [Section 4.7, "Content Management Actions on Files"](#)
- [Section 4.8, "Content File Status"](#)
- [Section 4.9, "Content Folder Context Menus"](#)
- [Section 4.10, "Content File Context Menus"](#)
- [Section 4.11, "Enabling Metadata Prompting for Enterprise Libraries and Folders"](#)

4.1 About Enterprise Libraries

For full information about using enterprise libraries, see *Using Oracle WebCenter Content*.

Enterprise libraries provide structure and organization to documents. They are the top level of a folder tree in which all folders and documents should be stored.

Enterprise libraries are created by individuals to provide flexible security and comprehensive document management used by an entire organization.

Enterprise libraries are a robust way to secure, manage and share content that is accessed by many people in your organization. You can set access in an enterprise library at the document level, lock documents while editing, and maintain a comprehensive revision history of documents. You can create and share any number of enterprise libraries and folders or shortcuts within enterprise libraries.

4.2 About Content Folders and Files

Content folders offer a familiar, tree-like structure that provides convenient access to files on a content server without having to use that server's own user interface (web-based or otherwise). They are essentially like the directories on your local

computer, but they point to virtual locations on the content server. Similarly, the "files" in the content folders are symbolic links or pointers to content items in the content server repository.

Oracle WebCenter Content Server Instances Running the WebCenter Content User Interface

Content folders and files interact with enterprise libraries in the following ways:

- Content folders can be nested beneath enterprise libraries.
- Files can be added to content folders or directly to enterprise libraries.
- You cannot add files directly beneath the enterprise libraries node in the integration hierarchy.

You only see enterprise libraries, folders, and files for which you have access privileges on the content server.

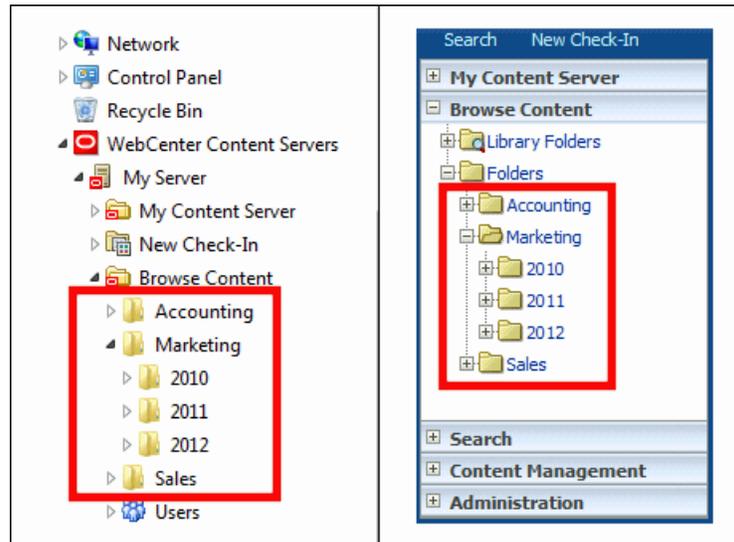
Oracle WebCenter Content Server Instances Running the Native 11g User Interface

For Oracle WebCenter Content Server instances, content folders are shown under **Browse Content** in the server's integration hierarchy in Windows Explorer and your email application.

Note: Content folders are available on client computers only if the content server administrator has enabled the folders functionality on the server. If this is not the case, you will not see a content folders tree in the integration hierarchy for a server. Also, content folders may be displayed differently for a content server than shown in this section, depending on the server configuration (specifically, the folders component running on it).

The folder structure that you see in the integration hierarchy in the native 11g user interface is identical to that in the Oracle WebCenter Content Server web interface (under 'Browse Content'), as illustrated in [Figure 4-1](#). You see only folders and files for which you have access privileges on the server.

Figure 4–1 Content Folders in Windows Explorer and Oracle WebCenter Content Server's Web Interface



Oracle Content Database Servers and Other WebDAV Servers

On Oracle Content Database servers and other WebDAV servers, content folders are shown directly under the defined server connection in the integration hierarchy in Windows Explorer and your email application. The folder structure that you see in the integration hierarchy is identical to that in Oracle Content DB's web interface or Oracle Drive. You only see folders and files for which you have access privileges on the server.

Interacting with Content Folders and Files

You work with content folders and files in the integration hierarchy of a content server in much the same way as you do with other, local folders and files on your computer. You can copy and paste files, drag and drop files, right-click files to open context menus, and so on. In addition, you can perform a number of content management tasks on the folders and files on the server. Depending on the server type and setup, you may check files out of the server, check them in, make them available for offline use, view content information, and so on.

4.3 Content Folder Metadata Inheritance and Propagation

When you create a new content folder on an **Oracle WebCenter Content Server** instance, the metadata from its parent folder automatically populates the metadata fields for the new folder. This allows the folder to initially "inherit" metadata, but enables you to make changes to the new folder. Subsequent changes to a parent folder's metadata do not affect the metadata for existing subfolders.

The content server administrator can enable the metadata propagation feature, which enables you to apply a parent folder's metadata to all the subfolders and files in it. See [Section 6.19, "Propagating Library and Folder Metadata"](#) for more information.

4.4 Content File Versioning

Oracle WebCenter Content Server

Oracle WebCenter Content Server can store multiple files of the same name as separate content items. However, in the integration of Oracle WebCenter Content Server with your Windows desktop applications, file names in content folders need to be unique (in the same way that a folder in Windows cannot contain two files of the same name). Because of this requirement, when you copy a file to a content folder that already contains a file of the same name, it is automatically checked in as a new revision of the existing file on the server. For example, if *process.doc* is in a folder on the server and you copy a second *process.doc* file to that same folder, then the second file becomes a new revision of the first file (even though they may be completely different documents). If *process.doc* is in a folder and you copy *process2.doc* or *process.xls* to that folder, then they remain separate content items because they have different file names.

When you move a file to a content folder that already contains a file with the same name, then that file may replace the original file in that folder, depending on the folders component running on the server. The old file is not removed, however; it just loses its folder association. The content item is still on the server and you can search for it.

The file name that is displayed in the Name column in Windows Explorer or your email application and in the Name field of the Content Properties dialog is the same as the original file name in the content server repository. When you rename content through the Windows Explorer integration, the original file name also changes to reflect the new name.

If Oracle WebCenter Content Server is set up to automatically generate content IDs, then the content IDs follow the established numbering convention for that server. If this option is not enabled, checking in a new content item generates a unique sequential content or message ID.

Oracle Content Database Servers

When you add a file to a content folder on an Oracle Content Database server that already contains a file of the same name, then it depends on the folder settings how this is handled. If automatic versioning is enabled for the folder, the file is checked in as a new revision of the existing file on the server. If manual versioning is enabled, then the existing file is simply overwritten (in other words, the content folder behaves exactly like standard Windows folders on your local computer).

Other WebDAV Servers

When you add a file to a content folder on a WebDAV server that already contains a file of the same name, then it depends on the server settings how this is handled. Unless the WebDAV server has special versioning features, the existing file is simply overwritten with the new file (in other words, the content folder behaves exactly like standard Windows folders on your local computer).

4.5 Content File Metadata

Metadata is "data about data." It enables the content server to keep track of all items managed on the server, and also helps with searching for items, controlling access, and so on.

When you check a file in to an **Oracle WebCenter Content Server** instance, you associate information with that file that uniquely identifies it so that you can easily

locate the file in the content server at any time. Oracle WebCenter Content Server uses three types of metadata: default, optional, and custom. The specific metadata fields used depend on how your system administrator has configured the server.

Default metadata fields are preconfigured for the software and include the content ID and primary file. The content ID is a unique identifier for each content item on the server and is often assigned automatically. If the system is set up to allow you to enter a content ID, you can do so in the content check-in form. Some of the default metadata fields are mandatory: a content item cannot be checked in with any of these fields left blank. Mandatory metadata fields are marked with an asterisk (*) on the content check-in form.

If you provide no title for the file being checked in, the file name (minus the file extension) is used as the title.

Desktop can "remember" the metadata values used at check-in and automatically populate metadata fields each time you check in a new content item. For more information, see [Section 2.14, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

Whenever you check a file in to Oracle WebCenter Content Server, default metadata values are automatically assigned to the content. These default values, which are set by the system administrator through Oracle WebCenter Content Server's web interface, are evaluated in the following order:

1. **Folder:** When you add a file to a content folder on the server, that file inherits any default metadata values for the folder that have been set through Oracle WebCenter Content Server's web interface.
2. **User:** For any metadata defaults not set for the folder, the user's default metadata values (as set in the user profile) are applied.
3. **System:** The system default values are applied to any fields that are not set by either the folder metadata or the user's default metadata.
4. **Email:** If the EmailMetadata component is installed on the content server, e-mail specific default metadata is assigned to the content.

After you check content in to the content server, you can change the metadata for the content item on its content information page (see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information"](#)).

Caution: If you change the security group, content type, or account of a content item, you will change the URL of that item in the content server and may also change who has access to the item.

If you change metadata for a folder, the new metadata is applied to all content you add to the folder after the change. The metadata of the content that is already in the folder prior to the change remains the same.

When you create a new content folder, the metadata from its parent folder automatically populates the metadata fields for the new folder. This allows the folder to initially "inherit" metadata, but enables you to make changes to the new folder. Subsequent changes to a parent folder's metadata do not affect the metadata for existing subfolders. If you want to apply a parent folder's metadata to subfolders and content items, you can use the metadata propagation feature.

4.6 Local Caching of Content Files

Desktop may download temporary copies of files from a content server and store them on your local computer. By default, the temporary storage cache is located in the following directory:

- **Windows XP:** C:\Documents and Settings\USER\Application Data\Stellent\SyndicationCache
- **Windows Vista and Windows 7:** C:\Users\USER\AppData\Roaming\Stellent\SyndicationCache

where *USER* is the profile name of the current computer user (for example, jsmith). The 'SyndicationCache' directory stores all offline Desktop files in separate subdirectories for each content server.

The following files are stored in your local cache:

- Copies of files that you checked out of the content server
- Read-only copies of files on the content server that you specifically marked to be available offline (so that you can access these files even if there is no connection to the server)
- Modified files managed by a content server that you have not yet checked back in to that server (typically checked-out files that were edited)
- Newly created files in Microsoft Office applications that were not checked in successfully (for example, because no server connection could be established)

Note: You can change the offline cache location on your computer if the defaults do not meet your organization's file storage requirements. For more information, see [Section A.2, "Changing the Location of the Local File Cache."](#)

4.7 Content Management Actions on Files

You can perform various content management actions on files on a content server:

- **View:** When you view a file on a content server, it opens in its associated application in read-only mode, but it is not checked out of the content server. You can make changes to the file in the application, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item. Depending on the file type and state, you may be able to check out a read-only document directly in a Microsoft Office application, so you can make changes and check it back in to the server as a new revision.

It is normally the latest released file revision on the server that is downloaded and opened in its associated application. However, if the file is already in your local cache (typically because you opened it before, modified it, but did not yet check it back in to the server), then you can choose which file version to open: the one in your local cache (**View**) or the latest released file revision on the server (**View File From Server**).

For more information, see [Section 6.9, "Viewing Content Files."](#)

- **Open:** When you open a file on a content server, it opens in its associated application in full edit mode and it is checked out of the content server. The file is locked on the server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). You can make

changes to the file as required. When you check the file back in to the content server, it is checked in as a new revision of the existing content item. In Microsoft Office applications, you are given the opportunity to do this when you close the document or exit the application; other file types must be checked in using Windows Explorer. For more information, see [Section 6.10, "Opening Content Files."](#) (Opening a content folder simply shows the contents of that folder.)

- **Check out (and check in):** When you check out a file from a content server, it is downloaded from the server and placed in the offline cache on your computer. The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). The checked-out file is not opened in its associated application. (This is how checking out a file is different from opening it.) You can process the file as desired, and check it back in to the server when you are ready. For more information, see [Section 6.11, "Checking Out Content Files."](#)

When you check in a file to a content server, it is uploaded and submitted to the content server. You can check in files as new revisions of content items already on the server, or new files as new content items. Once you check a file in to a server, it is stored on that server and other users have access to it in accordance with their assigned privileges. For more information, see [Section 6.12, "Checking In Content Files."](#)

- **Available offline:** When you make files available offline, you create copies of these files in a cache directory on your local computer, so that you can access these files even if there is no connection to the server. For more information, see [Section 8, "Working with Offline Content."](#)

[Table 4-1](#) below provides a side-by-side comparison between these content management actions on files on a server.

Table 4-1 Content File Actions

Action	Checked Out of Content Server?	Available in Offline Cache ⁽¹⁾ ?	Opened in Associated Application?
View	No	No ⁽³⁾	Yes ⁽⁴⁾
Open ⁽²⁾	Yes ⁽⁵⁾	Yes	Yes ⁽⁶⁾ ⁽⁷⁾
Check Out	Yes ⁽⁵⁾	Yes	No
Available Offline	No	Yes	No

Notes

1. The file is copied to a temporary location on your local computer and can be accessed in offline mode. For more information, see [Section 4.6, "Local Caching of Content Files."](#)
2. Opening a content folder simply shows the contents of that folder.
3. The file is copied to your local computer as a temporary file, but cannot be accessed in offline mode.
4. The file is opened in read-only mode. You can make changes to the file, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item. In Microsoft Office applications, you may be able to check it out directly depending on the file type and state, so you can make changes and check it back in to the server as a new revision.

5. The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out").
6. The file is opened in full edit mode. You can make changes to the file as required. When you check the file back in to the content server, it is checked in as a new revision of the existing content item. In Microsoft Office applications, you are given the opportunity to do this when you close the document or exit the application; other file types must be checked in using Windows Explorer.
7. If the file is already checked out or available offline, you can choose a specific application to open the file in rather than its associated application ("Open With").

4.8 Content File Status

Content items shown in the integration hierarchy are preceded by an icon which identifies their application type, as is customary in Microsoft Windows, as well as their content management status. Table 4–2 below lists the available status icons with their description. Each of these status icons is an overlay of the application icon for the content item (see Figure 4–2 for an example of a Word application icon with a checked-out status overlay).

Figure 4–2 *Checked-out Microsoft Word Document*



Table 4–2 *Status Icons for Content Items*

Icon	Description
	<p>This icon is used to indicate that you have currently checked out the content item. The versions of your locally cached copy and the original file on the content server match; that is, no changes have been made to either version since the file was checked out.</p> <p>It is not always possible to obtain the user login information on content servers other than Oracle WebCenter Content Server instances. Files that you have checked out yourself may then be marked as if someone other than you checked them out (showing the padlock icon; see below).</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>
	<p>This icon is used to indicate that you have currently checked out the content item. However, the versions of your locally cached copy and the original file on the content server do not match; more specifically, the modified timestamp of the file in your local cache has changed. This will typically be the case if you checked out a file, made changes to it, but did not yet check it back in to the content server. The icon provides a visual reminder for this.</p> <p>All shortcuts to a checked-out file will also show this icon, since they are linked to the original file.</p>
	<p>This icon is used to indicate that someone other than you has currently checked out the content item, and the file is locked. You cannot check out the item, but you can still view it or make it available offline on your computer.</p> <p>If you move the mouse cursor over the icon, you see a yellow box that includes the user name of the person who checked out the item.</p>

Table 4–2 (Cont.) Status Icons for Content Items

Icon	Description
	<p>This icon is used to indicate that there is a conflict between the locally cached copy of a content item and the original file on the content server. This will typically happen if the file in the local cache is modified, but it is not checked out to you (for example, because someone cancelled the checked-out status of the file in the content server). You also see this status if you have made changes to a file in a workflow, but have not yet approved or rejected the file.</p> <p>You can remedy this situation in either of two ways:</p> <ul style="list-style-type: none"> ■ If you do not mind losing all changes to your local copy, then you can right-click the item and choose the Discard Changes option in the context menu. The locally cached copy is then moved in the recycle bin, effectively deleting it (unless the cache directory is located on a network share; in that case it is deleted directly). ■ If you want to keep all changes to your local copy, then you can right-click the item and choose the Move to Desktop option in the context menu. The local cached copy is then moved to your desktop, and you can check out the original file and check in the file on your desktop.
	<p>This icon is used to indicate that the content item is currently available offline (that is, in local cache for your read-only access). The versions of your locally cached copy and the original file on the content server match; that is, no new revision has been checked in to the content server since you selected the file for offline availability.</p> <p>Only files can be made available offline, not folders. When you select the Make Content Available Offline option in the context menu of a folder, all content items in that folder (and any subfolders) are made available offline.</p>
	<p>This icon is used to indicate that the content item is currently available offline. However, the versions (more specifically, the dID attribute) of your locally cached copy and the original file on the content server do not match. This would, for example, be the case if someone updated the original item on the content server, and your local copy is still an older revision.</p> <p>You can remedy this situation by right-clicking the file or its folder and choosing the Refresh Offline Files option (for files) or Refresh Offline Content option (for folders). This updates the copy in your local cache with the latest revision on the content server (and the icon turns into a blue cylinder again).</p>

4.9 Content Folder Context Menus

When you right-click a folder in the integration hierarchy, a context menu comes up, which provides a number of options that are relevant to the folder in that particular situation (as is customary in Microsoft Windows). This context menu includes a number of standard Windows items (such as Copy and Delete), but also has a number of Desktop-specific content management options. The context menu for folders may include any of the following Desktop-specific options:

- **New Folder:** Enables you to create a new content subfolder in the current folder.
- **New Project:** Enables you to create a new collaboration subproject in the current project.
- **Open:** Opens the selected folder in a new window, with the folders pane not visible (when selected in folders pane), or opens the selected folder in the content pane (when selected in the content pane).
- **Make Content Available Offline:** Creates local copies of all content in the selected content folder or collaboration project in a special cache location on your computer. You can then view these files (in read-only mode) even if you are not connected to the content server. For more information, see [Section 8.2, "Making Folders and Files Available Offline."](#)

- **Refresh Offline Content:** Updates the offline file cache on your local computer to reflect the latest content of the corresponding content folder(s) or collaboration project(s) on the content server. For more information, see [Section 8.4, "Refreshing Offline Content."](#)
- **Remove Offline Content:** Deletes the content in the selected collaboration folder or collaboration project from the offline file cache on your local computer (not from the content server!). This means you can no longer view these files when you are not connected to the content server. For more information, see [Section 8.5, "Removing Offline Content."](#)
- **Search...** (Oracle WebCenter Content Server only): Opens a search form on the current content server where you can specify criteria and search for items on that server based on these criteria. For more information, see [Section 6.4, "Searching for Content Files."](#)
- **Show Quick Search** (Oracle WebCenter Content Server only): Shows or hides the Quick Search feature in Windows Explorer. For more information, see [Section 5.9, "Quick Search Integration."](#)
- **Show Only Published Content** (Oracle WebCenter Content Server only): Includes or excludes from the file list all content items that are in an unreleased state on the content server; that is, any content items that are currently in a workflow, have not yet been fully converted or indexed, or have a future release date. This option is not available when in a query folder or retention query folder. For more information, see [Section 6.20, "Showing or Hiding Unpublished Content Files."](#)
- **Propagate** (Oracle WebCenter Content Server only): Copies the metadata of the selected content folder or collaboration project to all subfolders and files in that folder or project. For more information, see [Section 6.19, "Propagating Library and Folder Metadata."](#)
- **Copy:** Copies the selected content folder or collaboration project and all its content into the copy-and-paste buffer. You can then create a copy of the folder(s) or project(s) by pasting them to a different location. (You can also press the **Ctrl+C** key combination to do this.) For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location. (You can also press the **Ctrl+V** key combination to do this.)
- **Create Shortcut** (Oracle WebCenter Content Server only): Creates a shortcut to the selected content folder or collaboration project at the same folder or project level in the integration hierarchy. For more information, see [Section 6.21, "Working with Shortcuts to Content Libraries, Folders, and Files."](#)
- **Delete:** Removes the selected content folder or collaboration project, including all its content, from the integration hierarchy (and also from the content server!). (You can also press the Delete key to do this.) *You should use this option with great care as it may directly affect files on the content server.* For more information, see [Section 6.18, "Deleting Libraries, Folders, and Files."](#)
- **Rename:** Enables you to give the selected content folder or collaboration project in the integration hierarchy a new name. (You can also press the **F2** key to do this.) For more information, see [Section 6.15, "Renaming Content Folders and Files."](#)
- **Folder Information...** (Oracle WebCenter Content Server only): Displays the folder information page on the server for the selected folder or project in the integration hierarchy. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)

- **Properties:** Displays a dialog that provides information about the selected folder or project in the integration hierarchy. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)
- **Advanced Properties** (Oracle Content DB servers only): Displays a window that displays the properties about the selected folder in the integration hierarchy. For more information, see [Section 6.14.2, "Viewing and Modifying Advanced Properties of Folders or Files."](#)
- **Sharing** (Oracle Content DB servers only): Displays a window where you can set the properties for sharing the selected folder(s); in other words, who has access to the folder and who can create content in it. For more information, see [Section 6.14.3, "Viewing and Modifying Sharing Properties of Folders or Files."](#)
- **Update Metadata** (Oracle WebCenter Content Servers using native 11g user interface only): This enables you to update the metadata that will be given to new content items in this folder. This will open either the Editing Default Metadata Values page or the Hierarchy Folder Configuration page, depending on which folder system is being used. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)
- **Favorite** (Oracle WebCenter Content Servers using WebCenter Content user interface only): Adds the current folder to your Favorites node.

4.10 Content File Context Menus

When you right-click a file in the integration hierarchy, a context menu comes up, which provides a number of options that are relevant to the file in that particular situation, as is customary in Microsoft Windows. This context menu includes a number of standard Windows items (such as Copy and Delete), but also has a number of Desktop-specific content management options. The context menu for files may include any of the following Desktop-specific options:

Note: Most of these options are also available on the **File** menu in Windows Explorer.

- **Open:** Opens the selected file in its associated application in full edit mode; that is, it is checked out of the content server, and if you make any changes, you can check it in as a new revision of the content item. For more information, see [Section 6.10, "Opening Content Files."](#)
- **View File From Server:** Downloads the latest released revision of the selected file from the content server to your local cache and opens it in its associated application in read-only mode. The file is not checked out and if you make any changes, you must check it in as a new content item. For more information, see [Section 6.9, "Viewing Content Files."](#)
- **View:** Opens the selected file from your local cache in its associated application in read-only mode. Its associated content item on the server is not checked out and if you make any changes to the file, you must check it in as a new content item. This option is available only if a file is in your local cache. For more information, see [Section 6.9, "Viewing Content Files"](#) and [Section 4.6, "Local Caching of Content Files."](#)
- **Open With...:** Allows you to choose the application with which to open the selected file (rather than the application associated with the file type). A submenu provides all available applications. This option is available only for files that are

already checked out of the content server. For more information, see [Section 6.10, "Opening Content Files."](#)

- **Check Out:** Retrieves the selected file from the content server and makes it available for further processing (for example, editing). For more information, see [Section 6.11, "Checking Out Content Files."](#)
- **Check In:** Uploads the selected file to the content server and stores it on that server. If it is a new content item, you must provide metadata. If it is an existing content item, it inherits the metadata from the previous revision. For more information, see [Section 6.12, "Checking In Content Files."](#)
- **Check In With Metadata:** Allows you to modify the metadata of a managed file before uploading it to the content server as a new revision. For more information, see [Section 6.12, "Checking In Content Files."](#)
- **Undo Check Out:** Cancels the checked-out status of the selected file on the content server. For more information, see [Section 6.11.3, "Undoing a File Check-Out."](#)
- **Discard Changes:** Moves the locally cached copy of a content item to the recycle bin, effectively deleting it (unless the cache directory is located on a network share; in that case it is deleted directly). This option is available if there is a conflict between the locally cached file copy and the original file on the content server.
- **Move to Desktop:** Moves the locally cached copy of a content item to the Windows desktop. This option is available if there is a conflict between the locally cached file copy and the original file on the content server. Moving the file to the desktop allows you to check out the original file and check in the file on your desktop.
- **Available Offline:** Creates local copies of all selected files in a special cache location on your computer. You can then view these files (in read-only mode), even if you are not connected to the content server. For more information, see [Section 8, "Working with Offline Content."](#)
- **Approve:** Approves the current file for moving to the next workflow step. If the document requires an electronic signature, the Workflow: Sign and Approve dialog opens, where you can electronically sign the current file and approve it for moving to the next step in the workflow. You can approve files only if they are not currently checked out. For more information, see [Chapter 7, "Working with Managed Content in Workflows."](#)
- **Reject:** Marks the current file in a workflow as rejected and returns it to the most recent workflow step that permitted contribution. The users assigned to that contribution step receive an email notification, so they can edit the file and submit it for review again. You can reject files only if they are not currently checked out. For more information, see [Chapter 7, "Working with Managed Content in Workflows."](#)
- **Remove From Your Assignments:** Removes the current file from your list of workflow assignments (in your My Workflow Assignments folder). Selecting this option does not change the document's workflow status. If a subsequent workflow step assigns the document to you, it will again appear in your list. If you need to reinstate an item to your list, you will need to do so through the server's web interface. This option is available only when using the WebCenter Content user interface. For more information, see [Chapter 7, "Working with Managed Content in Workflows."](#)
- **Copy:** Copies the selected file from the local cache into the copy-and-paste buffer. You can then create a copy of this file by pasting it to a different location. (You can also press the **Ctrl+C** key combination to do this.) This option is available only if a

file is in your local cache. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)

- **Copy File From Server:** Copies the latest released revision of the selected file on the server into the copy-and-paste buffer (rather than from your local cache). You can then create a copy of this file by pasting it into a different location. (You can also press the **Ctrl+C** key combination to do this.) For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location.
- **Copy Links:** Copies the various URLs of the selected file in the integration hierarchy into the copy-and-paste buffer. You can then paste these URLs into any Windows application (for example, an email message) to provide direct links to the file. For more information, see [Section 6.23, "Copying Content File Links."](#)
- **Create Shortcut** (Oracle WebCenter Content Server only): Creates a shortcut to the selected file in the same integration hierarchy folder as the referenced file. For more information, see [Section 6.21, "Working with Shortcuts to Content Libraries, Folders, and Files."](#)
- **Delete:** Removes the selected file from the integration hierarchy (and also from the content server!). (You can also press the Delete key to do this.) *You should use this option with great care as it may directly affect files on the content server.* For more information, see [Section 6.18, "Deleting Libraries, Folders, and Files."](#)
- **Rename:** Enables you to give the selected file in the integration hierarchy a new name. (You can also press the **F2** key to do this.) This option is not available when the file is currently checked out of the content server. For more information, see [Section 6.15, "Renaming Content Folders and Files."](#)
- **Content Information...** (Oracle WebCenter Content Server only): Displays the content information page on the server for the selected file in the integration hierarchy. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)
- **Properties:** Displays a dialog that provides information about the selected file in the integration hierarchy. For more information, see [Section 6.14, "Viewing and Modifying Library, Folder and File Properties."](#)
- **Advanced Properties** (Oracle Content DB servers only): Displays a window that displays the properties about the selected file in the integration hierarchy. For more information, see [Section 6.14.2, "Viewing and Modifying Advanced Properties of Folders or Files."](#)
- **Sharing** (Oracle Content DB servers only): Displays a window where you can set the properties for sharing the selected file; in other words, who has access to the file. For more information, see [Section 6.14.3, "Viewing and Modifying Sharing Properties of Folders or Files."](#)
- **Update Metadata** (Oracle WebCenter Content Servers using native 11g user interface only): This enables you to update the metadata for a content item. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)
- **Favorite** (Oracle WebCenter Content Servers using WebCenter Content user interface only): Adds the current file to your Favorites node.

4.11 Enabling Metadata Prompting for Enterprise Libraries and Folders

Note: The procedure given in this section is for Oracle WebCenter Content Server 11gR1 instances. This feature is also available for Oracle Content DB Server instances (see the *Oracle Content Database Administrator's Guide*).

When you drag and drop, copy and paste, or save a new file to an enterprise library or folder, you may be asked to provide metadata for that file before it is checked in to the server. This only happens if the enterprise library or folder was specifically configured to enable metadata prompting. If metadata prompting is not enabled for an enterprise library or folder, new files in that library or folder will always inherit the default metadata values for the library or folder as set through the content server's web interface. If a required field does not have a default value assigned to it, you will always be prompted to provide metadata. For more information on metadata inheritance, see [Section 4.5, "Content File Metadata."](#)

To enable metadata prompting for an enterprise library or folder:

1. Open Windows Explorer and make sure the folders pane is visible.
2. Open the **WebCenter Content Servers** node.
3. Click the Oracle WebCenter Content Server or Oracle Content DB Server instance that stores the library or folder for which you want to enable metadata prompting. If prompted, log in by entering your user name and password for that server.
4. Select the library or folder in the integration hierarchy for which you want to enable metadata prompting.

The preview pane, if enabled, displays the content information of the selected folder. If the preview pane is not visible, you can enable it (see [Section 5.13.2, "Showing or Hiding the Preview Pane"](#)). You can also right-click the folder and choose **Folder Information** to open the information page in a separate window.

The information page shows metadata that is assigned to the selected folder on the content server (for example, its owner, content type, security group, and so on).

See *Using Oracle WebCenter Content* for more information on content information (metadata).

5. Do whichever of the following is appropriate for your installation:

If you are using the native 11g user interface

Either:

- Open the **Folder Actions** menu and then choose **Update** to open the Hierarchy Folder Configuration page; or
- Open the **Edit** menu, then click **Folder Information**, and then **show advanced options**.

Make sure that the **Prompt for Metadata** or **Enable Metadata Prompts** check box is selected.

If you are using the WebCenter Content User Interface

- In the preview pane, on the metadata tab, select **Prompt for metadata when items are added to this library/folder**.

Note: If you do not see these options, then you do not have sufficient privileges on the server to perform that action.

6. When you are done, click **Save** or **Submit Update** to save the changes. The changes take effect immediately; you do not need to restart your computer or the content server.

Part II

Windows Explorer Integration

This part describes how Oracle WebCenter Content: Desktop is integrated into Microsoft Windows Explorer. It also describes how to use this integration.

Part II contains the following chapters:

- [Chapter 5, "Understanding Windows Explorer Integration"](#)
- [Chapter 6, "Working with Managed Content Files in Windows Explorer"](#)
- [Chapter 7, "Working with Managed Content in Workflows"](#)
- [Chapter 8, "Working with Offline Content"](#)

Understanding Windows Explorer Integration

This section covers these topics:

- [Section 5.1, "About Windows Explorer Integration"](#)
- [Section 5.2, "Accessing Desktop Integration in Windows Explorer"](#)
- [Section 5.3, "Desktop Integration Features in Windows Explorer on Windows 7 and Vista"](#)
- [Section 5.4, "Desktop Integration Features in Windows Explorer on Windows XP"](#)
- [Section 5.5, "WebCenter Content Servers Hierarchy in Navigation Pane"](#)
- [Section 5.6, "Content Pane"](#)
- [Section 5.7, "Preview Pane"](#)
- [Section 5.8, "Details Pane"](#)
- [Section 5.9, "Quick Search Integration"](#)
- [Section 5.10, "Adding Nodes and Folders to the Windows Favorites List"](#)
- [Section 5.11, "Buttons in Standard Buttons Toolbar"](#)
- [Section 5.12, "Content Pane View Modes"](#)
- [Section 5.13, "Showing or Hiding Panes"](#)
- [Section 5.14, "Modifying the Column Settings in the Content Pane"](#)

5.1 About Windows Explorer Integration

The integration of Oracle WebCenter Content Server, Oracle Content Server, Oracle Content Database, or other WebDAV-based content servers into Windows Explorer provides a convenient way to manage files on those servers using a familiar work environment. You do not need to work with the files on the content server in a web browser or other, proprietary client interface (although this option remains available). Instead, you can interact with content servers and the files on them using a 'folders tree' in Windows Explorer.

After you install the Desktop client software on your computer, the folders hierarchy in Windows Explorer includes a top-level node called **WebCenter Content Servers**, which provides an interface through which you can connect to servers and work with the files on them. You can manage files and folders on a content server using custom context menus, while taking advantage of much of standard Windows functionality, such as drag-and-drop, copy-and-paste, and shortcuts.

Note: There is no access to Oracle WebCenter Content Server administrative functions through the desktop integration interface. All Desktop administrative functions are performed through the Oracle WebCenter Content Server web browser interface. See also *Managing Oracle WebCenter Content*.

5.2 Accessing Desktop Integration in Windows Explorer

You can access content servers in Windows Explorer using any of the following methods:

- Double-click the **WebCenter Content Servers** icon on your Windows desktop (Figure 5-1).

Figure 5-1 *WebCenter Content Server Icon on Windows Desktop*

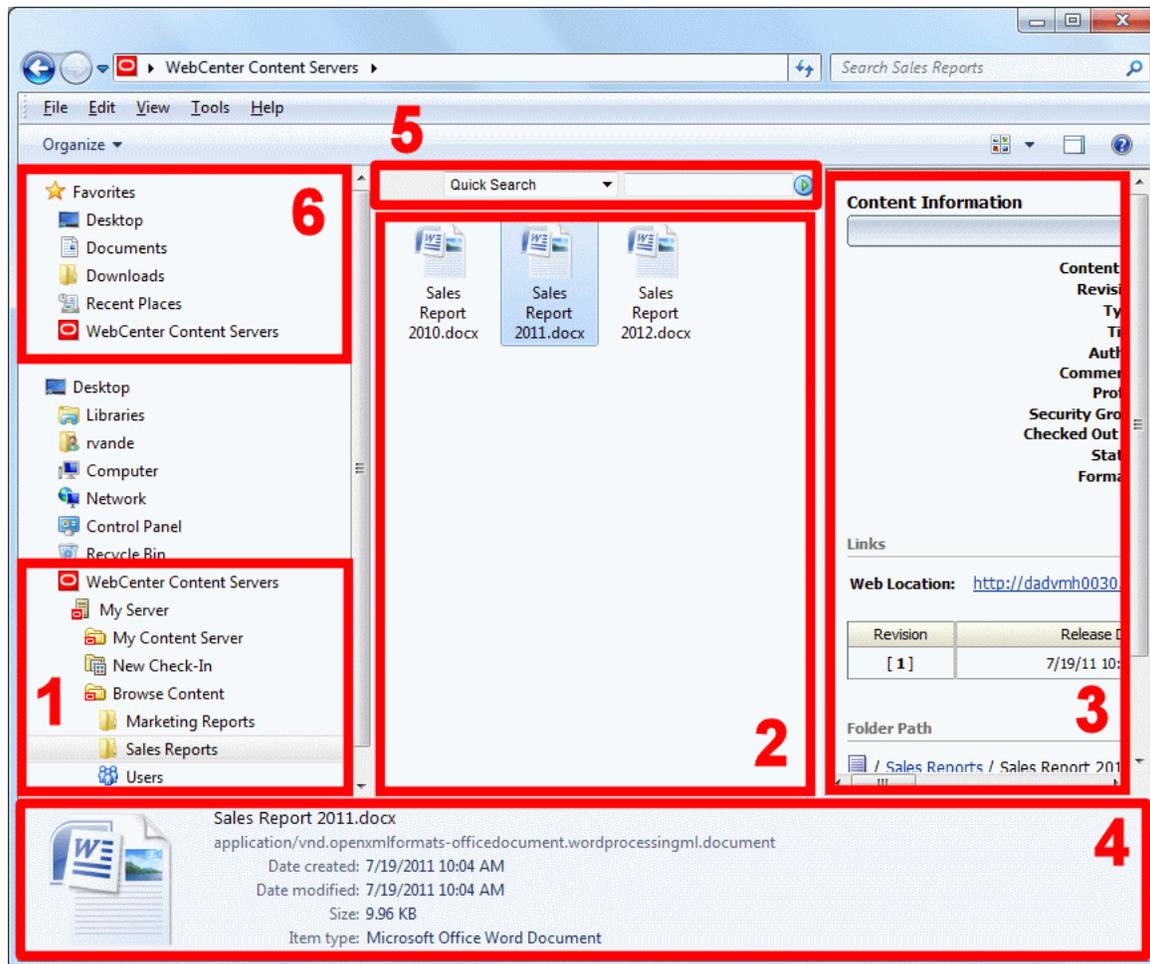


- Navigate to the top-level **WebCenter Content Servers** node in the Windows Explorer folders list. For more information, see [Section 5.5, "WebCenter Content Servers Hierarchy in Navigation Pane."](#)
- Select the top-level **WebCenter Content Servers** node in the Favorites list in the navigation pane (Windows 7), or from the **Favorites** menu (Windows XP). In Windows 7, this node should already be included in the Favorites list. To add the node (or content folders) manually, see [Section 5.10, "Adding Nodes and Folders to the Windows Favorites List."](#)
- Double-click a shortcut to a particular content server, content folder, or content item.

5.3 Desktop Integration Features in Windows Explorer on Windows 7 and Vista

After you install the Desktop client software on your computer running Microsoft Windows 7 or Vista, it integrates into Windows Explorer in several ways. As shown in [Figure 5-2](#), Desktop offers content management features in Windows Explorer in different areas:

1. [WebCenter Content Servers Hierarchy in Navigation Pane](#) (see [Section 5.5](#) on page 5-4)
2. [Content Pane](#) (see [Section 5.6](#) on page 5-5)
3. [Preview Pane](#) (see [Section 5.7](#) on page 5-5)
4. [Details Pane](#) (see [Section 5.8](#) on page 5-6)
5. [Quick Search Integration](#) (see [Section 5.9](#) on page 5-6)
6. [Adding Nodes and Folders to the Windows Favorites List](#) (see [Section 5.10](#) on page 5-7)

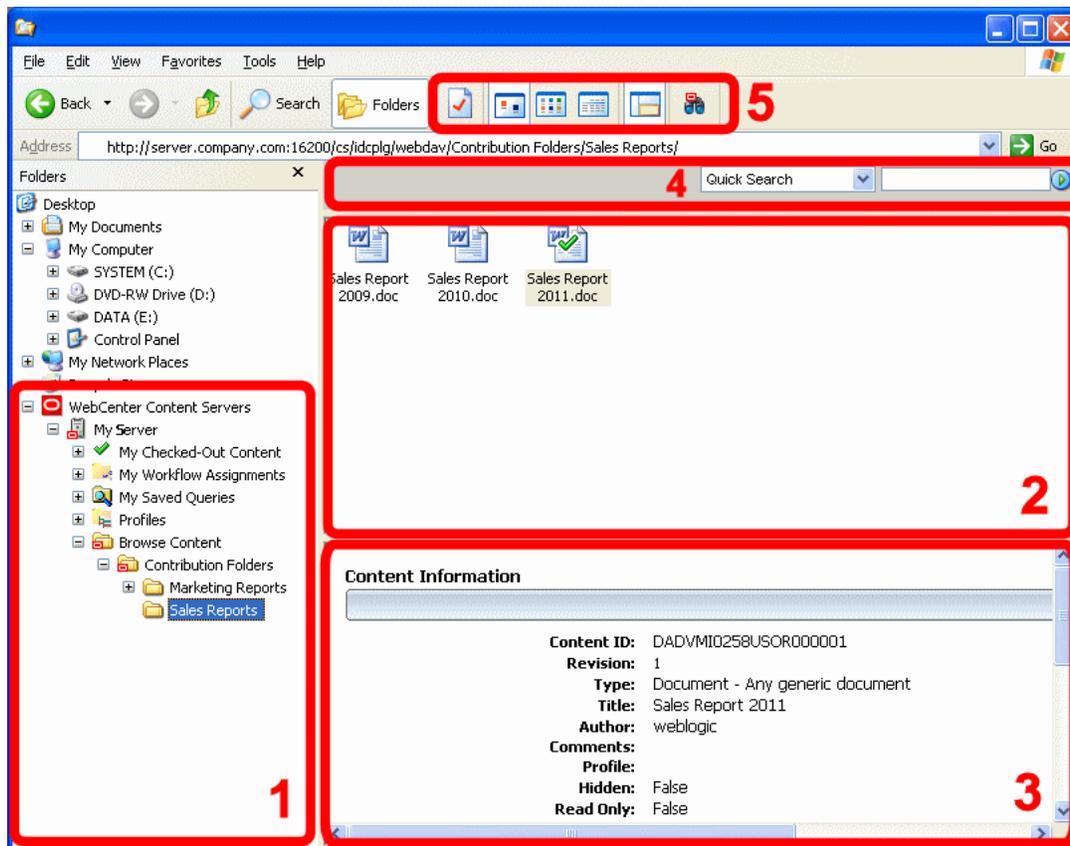
Figure 5–2 Desktop Integration Features in Windows Explorer on Windows 7 (Native 11g User Interface)

5.4 Desktop Integration Features in Windows Explorer on Windows XP

After you install the Desktop client software on your computer running Microsoft Windows XP, it integrates into Windows Explorer in several ways. As shown in [Figure 5–3](#), Desktop offers content management features in Windows Explorer in different areas:

1. [WebCenter Content Servers Hierarchy in Navigation Pane](#) (see [Section 5.5](#) on page 5-4)
2. [Content Pane](#) (see [Section 5.6](#) on page 5-5)
3. [Preview Pane](#) (see [Section 5.7](#) on page 5-5)
4. [Quick Search Integration](#) (see [Section 5.9](#) on page 5-6)
5. [Buttons in Standard Buttons Toolbar](#) (see [Section 5.11](#) on page 5-7)

Figure 5–3 Desktop Integration Features in Windows Explorer on Windows XP (Native 11g User Interface)



5.5 WebCenter Content Servers Hierarchy in Navigation Pane

The Desktop client software adds a hierarchical folder structure called **WebCenter Content Servers** to the navigation pane in Windows Explorer (Figure 5–2). For more information on this integration hierarchy in Windows Explorer, see [Chapter 3, "Understanding the Integration Hierarchy."](#)

You work with content managed on a content server in much the same way you do with other folders and files on your computer. You can copy files, drag and drop files into folders, right-click objects to open context menus, and so on. However, some tasks typically performed on files or folders on your local computer may have a somewhat different effect when performed on files and folders managed by a content server. For example, copying a new file to a content folder does not put it on your local computer, but rather uploads and saves it on the content server. In addition, the context menus of files may include items specific to content management, such as Check In, Check Out, Copy Links, and so on. For more information, see [Chapter 6, "Working with Managed Content Files in Windows Explorer."](#)

The user logins and security controls on a content server also apply to files and folders that are managed through the integration hierarchy in Windows Explorer. For example, if you have only read permission for a content item, you will be able to open a copy of the native file, but you will not be able to check a new revision of the file in to the content server (which requires write permission). Similarly, when you create a new folder in the folder hierarchy on the server, each person who has the rights to view that folder will see it on their local computer. The files you add to the folder will

also be available to each user on the content server, again according to their security permissions.

5.6 Content Pane

The integration with Windows Explorer works much as you would expect in Microsoft Windows. You can drag and drop files into content server folders, copy and paste files (using various methods), create shortcuts, and so on.

When you select an object in the WebCenter Content Servers hierarchy in the navigation pane, the contents of that object are displayed on the right, in the content pane. It may, for example, show a list of all files in the current content folder. Unpublished content items on an Oracle WebCenter Content Server instance are shown in a different color, typically green (see [Section 6.20, "Showing or Hiding Unpublished Content Files"](#)).

Content Management Status Icon

Managed content files listed in the content pane may have a symbol in their file icon to indicate their content management status. For example, if the file is currently checked out by yourself, this is visualized using a green check mark, as shown in [Figure 5-4](#). For a full explanation of all content management status icons, see [Section 4.8, "Content File Status."](#)

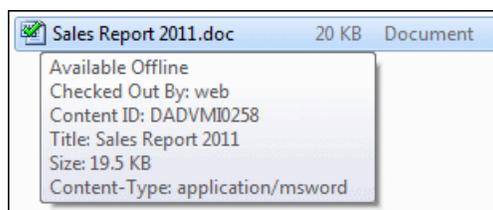
Figure 5-4 Status Icon Overlaid on Top of Microsoft Word Application Icon



Content Management Tooltip

If you hover your mouse cursor over a managed file in the content pane, a screen tip is displayed providing content management information about that file, as shown in [Figure 5-5](#).

Figure 5-5 Screen Tip Showing Content Management Information About File



5.7 Preview Pane

When you select an object in the WebCenter Content Servers hierarchy in the navigation pane, the contents of that object are displayed on the right, in the content pane. It may, for example, show a list of all files in the current content folder. You may also see a preview pane, which provides additional information about the selected item in the content pane (as examples: the content information page for a file on the content server; or tabs showing summary information, metadata, and a preview of the selected document).

If you do not see the preview pane, you can enable it (see [Section 5.13.2, "Showing or Hiding the Preview Pane"](#)).

5.8 Details Pane

When you select an object in the WebCenter Content Server hierarchy in the navigation pane in Windows 7, you may see a details pane, which provides more details about the selected object. For example, in the native 11g user interface, the details pane may show the MIME type, modification date, and size of a file on the content server. (In the WebCenter Content user interface, such details are usually shown on the tabs in the preview pane.)

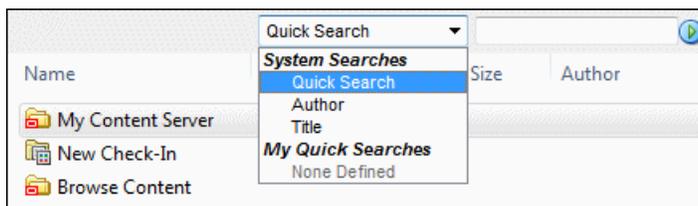
If you do not see the details pane, you can enable it (see [Section 5.13.3, "Showing or Hiding the Details Pane"](#)).

5.9 Quick Search Integration

The Desktop client software adds Oracle WebCenter Content Server's Quick Search feature to Windows Explorer, which enables you to quickly search for content on an Oracle WebCenter Content Server instance. The Quick Search feature is shown above the content pane ([Figure 5–6](#)) when you are anywhere within a server's integration tree. If you do not see it, right-click in an unused area of the content pane (that is, away from any of the items listed in it) and choose **Show Quick Search**. Quick Search visibility is controlled for each server in the integration hierarchy separately.

Quick Search Integration in the Native 11g User Interface

Figure 5–6 Quick Search Integration in Windows Explorer on Windows 7 (Native 11g User Interface)

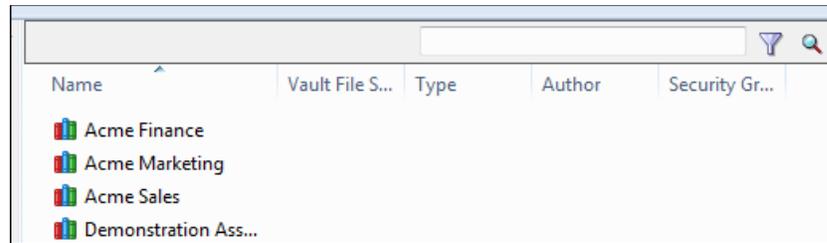


The Quick Search integration in Windows Explorer exactly mimics the Quick Search feature in Oracle WebCenter Content Server's web browser interface.

Note: The Quick Search integration in Windows Explorer requires the Desktop component 11g Release 1 (11.1.1.6 or higher) on the Oracle WebCenter Content Server instance. It is not available with earlier component versions.

Quick Search Integration in the WebCenter Content User Interface

Figure 5–7 Quick Search Integration in Windows Explorer on Windows 7 (WebCenter Content User Interface)



The search results are displayed in the content pane. For more information about this feature, see [Section 6.4, "Searching for Content Files"](#) and also *Using Oracle WebCenter Content*.

5.10 Adding Nodes and Folders to the Windows Favorites List

Note: These procedures apply when you are using Oracle WebCenter Content Desktop with the native 11g user interface. If you are using the WebCenter Content user interface, it is recommended that you use its built-in favorites feature. See [Section 6.24, "Creating a List of Favorite Content Items."](#)

In Windows 7, you can add the top-level node or a content folder to the favorites list in one of the following ways:

- Select the node or folder in the navigation pane, then right-click the **Favorites** node and select **Add current location to Favorites**.
- Select the node or folder in the content pane, then drag it to the **Favorites** node in the navigation pane.

In Windows XP, you can add a top-level node or a content folder to the favorites list in one of the following ways:

- Select the node or folder in the navigation pane, select the **Favorites** menu and **Add to Favorites**, then select **OK** in the Add Favorite dialog.
- Select the node or folder in the navigation pane, drag it to the **Favorites** menu, wait for the menu to open, then drag to the lower part of the menu before releasing the mouse button.

5.11 Buttons in Standard Buttons Toolbar

The Desktop client software adds some buttons to the Standard Buttons toolbar in Windows Explorer on Windows XP. These buttons are visible only if you are in the WebCenter Content Servers hierarchy.

Figure 5–8 Windows Explorer Button Bar in Windows XP

Button	Description
	Click this button to open the properties dialog of the selected server, folder, or content item.
	Click this button to display the items in the content pane in icons view. For more information, see Section 5.12, "Content Pane View Modes."
	Click this button to display the items in the content pane in list view. For more information, see Section 5.12, "Content Pane View Modes."
	Click this button to display the items in the content pane in details view. For more information, see Section 5.12, "Content Pane View Modes."
	Click this button to show or hide the Desktop preview pane. For more information, see Section 5.7, "Preview Pane."
	Click this button to open a search form on the current content server, where you can specify criteria and search for items on that server based on these criteria. This button is available only for Oracle WebCenter Content Server instances, not for other WebDAV servers (including Oracle Content DB). You can also search a content server by right-clicking it anywhere in its integration tree node and choosing Search....

5.12 Content Pane View Modes

When you select an object in the integration hierarchy, the content pane shows the contents of that object (for example, a list of files in the current content folder on the server). How the information is displayed depends on the view mode: icons, lists, details, etc.

Desktop supports all view modes offered by the operating system. If a view includes applications icons, then these will include overlaid symbols to indicate the content management status of the object. See [Section 4.8, "Content File Status"](#) for further details.

5.13 Showing or Hiding Panes

Some of the panes in Windows Explorer can be turned on and off:

- [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)
- [Section 5.13.2, "Showing or Hiding the Preview Pane"](#)
- [Section 5.13.3, "Showing or Hiding the Details Pane"](#)

5.13.1 Showing or Hiding the Navigation Pane

The navigation pane in Windows Explorer includes the WebCenter Content Servers integration hierarchy. If you do not see the navigation pane, you can enable it:

- **Windows 7 and Windows Vista:** Open the **Organize** menu, then choose **Layout**, and then **Navigation Pane**.
- **Windows XP:** Open the **View** menu, then choose **Explorer Bar**, and then **Folders**. Alternatively, you can also click the Folders button in the toolbar.

5.13.2 Showing or Hiding the Preview Pane

If you select an item in the WebCenter Content Servers hierarchy in Windows Explorer, the preview pane shows information about the selected item. You may turn the preview pane on or off. The preview pane remains enabled or disabled for each specific server connection, which includes every folder in it. If you open a folder from a different server connection, you will see the preview pane only if it was enabled for that server.

To show or hide the preview pane in Windows Explorer, do the following:

- **Windows 7 and Windows Vista:** Open the **Organize** menu, then choose **Layout**, and then **Preview Pane**. Alternatively, you can also click the preview pane icon in the toolbar.
- **Windows XP:** Open the **View** menu and then choose **Preview Pane**. Alternatively, you can also click the preview pane icon in the toolbar.

5.13.3 Showing or Hiding the Details Pane

The details pane in Windows 7 may show more details about the selected item in the content pane. For example, in the native 11g user interface, the details pane may show the MIME type, modification date, and size of a file on the content server. (In the WebCenter Content user interface, such details are usually shown on the tabs in the preview pane.)

To show or hide the details pane in Windows Explorer, open the **Organize** menu, then choose **Layout**, and then **Details Pane**.

5.14 Modifying the Column Settings in the Content Pane

When you select an object in the integration hierarchy, the content pane shows the contents of that object (for example, a list of files in the current content folder). In details view, the content pane includes a number of columns that show metadata information about the files or folders (for example, their security group or author). You can modify the metadata columns to be displayed as well as their default width and order.

To change the column display settings:

1. Log in to the content server for which you want to change the content display.
2. Set the content pane view mode to details view. For more information, see [Section 5.12, "Content Pane View Modes."](#)
3. Right-click any of the column headings in the content pane.
 - **Windows 7 and Windows Vista:** Choose **More...** to open the Choose Details dialog.

- **Windows XP:** Choose **Column Settings...** to open the Column Settings dialog.
4. Make changes to the column display, order, and width settings as desired.
 5. Click **OK** when you are done. (The changes take effect immediately and they apply to the entire content server.)

Note: You can also change the width of a column by dragging its right handle.

Working with Managed Content Files in Windows Explorer

This section covers these topics:

- [Section 6.1, "About Windows Explorer Integration"](#)
- [Section 6.2, "Creating Enterprise Libraries"](#)
- [Section 6.3, "Creating Content Folders"](#)
- [Section 6.4, "Searching for Content Files"](#)
- [Section 6.5, "Working with Saved Search Queries and Query Folders"](#)
- [Section 6.6, "Browsing to Content Files"](#)
- [Section 6.7, "Creating New Content Files"](#)
- [Section 6.8, "Modifying Existing Content Files"](#)
- [Section 6.9, "Viewing Content Files"](#)
- [Section 6.10, "Opening Content Files"](#)
- [Section 6.11, "Checking Out Content Files"](#)
- [Section 6.12, "Checking In Content Files"](#)
- [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information"](#)
- [Section 6.14, "Viewing and Modifying Library, Folder and File Properties"](#)
- [Section 6.15, "Renaming Content Folders and Files"](#)
- [Section 6.16, "Copying Libraries, Folders, and Files"](#)
- [Section 6.17, "Moving Libraries, Folders, and Files To and From a Server"](#)
- [Section 6.18, "Deleting Libraries, Folders, and Files"](#)
- [Section 6.19, "Propagating Library and Folder Metadata"](#)
- [Section 6.20, "Showing or Hiding Unpublished Content Files"](#)
- [Section 6.21, "Working with Shortcuts to Content Libraries, Folders, and Files"](#)
- [Section 6.22, "Working with Your Personal Folders"](#)
- [Section 6.23, "Copying Content File Links"](#)
- [Section 6.24, "Creating a List of Favorite Content Items"](#)

6.1 About Windows Explorer Integration

The integration of Oracle WebCenter Content Server, Oracle Content Database, or other WebDAV-based content servers into Windows Explorer provides a convenient way to manage files on those servers using a familiar work environment. You do not need to work with the files on the content server in a web browser or other, proprietary client interface (although this option remains available). Instead, you can interact with content servers and the files on them using a tree structure in Windows Explorer.

See [Chapter 5, "Understanding Windows Explorer Integration"](#) for details on how the Desktop client software integrates with the Windows Explorer interface.

See [Chapter 4, "Understanding Enterprise Libraries, Folders, and Files"](#) for general information about document libraries, content folders and files.

6.2 Creating Enterprise Libraries

If you have sufficient privileges, you can create new enterprise libraries.

The ability to create enterprise libraries is available if you are connecting to an Oracle WebCenter Content 11gR1 (11.1.1.8.0) or higher instance running the WebCenter Content user interface.

To add enterprise libraries to the integration hierarchy:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server on which you want to create a new library. If prompted, log in by entering your user name and password for that server.
4. To add a new enterprise library, select **Enterprise Libraries** in the integration hierarchy.
5. Move the mouse cursor to an unused area in the content pane (that is, away from any of the items listed in it), right-click, and choose **New Library**.

Alternatively, you can open the **File** menu and choose **New Library**.

6. Provide the name of the new library and press Enter.
7. The new library is created, and its information page opens in the preview pane. If you do not see this pane, you can turn it on (see [Section 5.13.2, "Showing or Hiding the Preview Pane"](#)).

Considerations

- After you have created an enterprise library, you can create folders beneath it, and then add documents to those folders. You can also add documents directly to library nodes (except to the top-most Enterprise Library node).

6.3 Creating Content Folders

You can add content folders to the integration hierarchy in much the same way as you add folders on your local computer.

To add content folders to the integration hierarchy:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server on which you want to create a new content folder. If prompted, log in by entering your user name and password for that server.
4. Browse to the location in the integration hierarchy where you want to add the new content folder.

You can add content folders under certain nodes only. Where you cannot add a content folder, the option is not available on the **File** menu.

5. Move the mouse cursor to an unused area in the content pane (that is, away from any of the items listed in it), right-click, and choose **New Folder**. Alternatively, you can open the **File** menu and choose **New Folder**.
6. Provide the name of the new folder and press Enter.
7. The new folder is created, and its folder information page opens in the preview pane. If you do not see this pane, you can turn it on (see [Section 5.13.2, "Showing or Hiding the Preview Pane"](#)).

Considerations

- When you add a new content folder, default metadata and settings are applied to that folder as defined by the content server administrator. You can change the default metadata for the folder while adding the new folder, or any time after you add it. For more information, see [Section 6.13, "Viewing and Modifying Library, Folder, and Content Information."](#)
- When you add files to the new folder, they inherit default metadata from the folder.

6.4 Searching for Content Files

The Desktop client software offers various ways in Windows Explorer to search for files on Oracle WebCenter Content Server, so you can select one or more files for further use (checking out, copying, editing, and so on):

- [Section 6.4.1, "Searching for Files from a Server Integration Hierarchy"](#)
- [Section 6.4.2, "Searching for Files Using the Quick Search Feature"](#)
- [Section 6.4.3, "Searching for Files Using the Toolbar"](#)
- [Section 6.4.4, "Searching for Files from a Web Browser"](#)

Note: You cannot search Oracle Content DB servers or other WebDAV servers. You must browse to files on these servers to select them. See [Section 6.6, "Browsing to Content Files."](#)

6.4.1 Searching for Files from a Server Integration Hierarchy

To search for files from the integration hierarchy of a server in the Windows Explorer navigation pane:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.

3. Move to anywhere in the integration hierarchy of the server whose content you want to search. If prompted, log in by entering your user name and password for that server. In the native 11g user interface, this will search the entire content server. If you want to limit your search to a particular folder and, potentially, its subfolders, then select that folder in the folders tree under Browse Content.
4. Right-click and choose **Search...** in the context menu. Alternatively, you can open the **File** menu and choose the **Search...** option. On Windows XP, you can also choose the search icon in the toolbar.

The Content Query Capture dialog opens. This screen is basically the standard Oracle WebCenter Content Server search form.

5. Enter the search criteria in the form and click **Search**. You can perform searches based on metadata (that is, information about files) or full text (that is, text contained in the actual files), or a combination of both. If content profiles are defined on the server, you can select one from the dropdown list to limit the metadata fields shown on the search form. For more details on using the search form, see *Using Oracle WebCenter Content*.

If you ran the search from a content folder, there may be a check box on the search form to include all subfolders of the current folder in your search query, depending on the server configuration. Otherwise the search will be limited to content items in the current folder only.

The content pane shows all content items on the server that meet your search criteria, and you can work with any of these files directly from there. You can right-click a selected file to see a menu that provides a number of relevant options for that file in that particular context. The search results list shows only content items that meet the search criteria, not shortcuts to content items or folder names, even if these meet the search criteria. Also, the items in the search results list are the actual files, not copies or pointers of some sort. Deleting a file from the search results removes it from all folders and may remove the actual content item from the server (you are offered this as an option).

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 6.5, "Working with Saved Search Queries and Query Folders."](#)

6.4.2 Searching for Files Using the Quick Search Feature

To search for files using the Quick Search feature in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Move to anywhere in the integration hierarchy for the server whose content you want to search. If prompted, log in by entering your user name and password for that server.
4. If you are using a native 11g user interface, make sure the Quick Search panel is visible. If this is not the case, right-click and make sure that **Show Quick Search** is checked in the context menu.
5. In the text entry box, enter some characters to represent what you are searching for.

In the native 11g user interface, you can choose search categories from a drop-down list: Quick Search (a file name search), Authors, and Titles.

6. Press Enter, or click the search icon to the right of the text entry box.

The content pane shows all content items on the server that meet your search criteria, and you can work with any of these files directly from there. You can right-click a selected file to see a menu that provides a number of relevant options for that file in that particular context. The search results list shows only content items that meet the search criteria, not shortcuts to content items or folder names, even if these meet the search criteria. Also, the items in the search results list are the actual files, not copies or pointers of some sort. You can remove a file from view in the search results list, but if you also choose to delete the file, you are removing the actual content item from the content server.

After a search on a server that uses the WebCenter Content user interface, a **Filter Search Results** icon appears in the Quick Search panel. By selecting this icon, you may be able to see and select the search results, sorted into subcategories.

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 6.5, "Working with Saved Search Queries and Query Folders."](#)

You can perform general metadata searches from the Quick Search panel, or use personal quick searches as defined on the content server (under My Content Server, My Quick Searches). See *Using Oracle WebCenter Content* for information on how to define personal quick searches.

Note: For more information about the Quick Search feature in Windows Explorer, see [Section 5.9, "Quick Search Integration."](#)

6.4.3 Searching for Files Using the Toolbar

To search for files using the toolbar in Windows Explorer on Windows XP:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Move to anywhere in the integration hierarchy for the server whose content you want to search. If prompted, log in by entering your user name and password for that server. This will search the entire content server. If you want to limit your search to a particular folder and, potentially, its subfolders, then select that folder in the folders tree under Browse Content.
4. Make sure the Standard Buttons toolbar is visible. If this is not the case, choose **View**, then **Toolbars**, and then **Standard Buttons**.
5. Click the Search icon in the toolbar ([Figure 6–1](#)).

Figure 6–1 Search Icon



The Content Query Capture dialog opens. This screen is basically the standard Oracle WebCenter Content Server search form.

6. Enter the search criteria in the form and click **Search**. You can perform searches based on metadata (that is, information about files) or full text (that is, text contained in the actual files), or a combination of both. For more details on using the search form, see *Using Oracle WebCenter Content*.

If you ran the search from a content folder, there may be a check box on the search form to include all subfolders of the current folder in your search query, depending on the server configuration. Otherwise the search will be limited to content items in the current folder only.

The content pane shows all content items on the server that meet your search criteria, and you can work with any of these files directly from there. You can right-click a selected file to see a menu that provides a number of relevant options for that file in that particular context. The search results list shows only content items that meet the search criteria, not shortcuts to content items or folder names, even if these meet the search criteria. Also, the items in the search results list are the actual files, not copies or pointers of some sort. You can remove a file from view in the search results list, but if you also choose to delete the file, you are removing the actual content item from the content server.

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 6.5, "Working with Saved Search Queries and Query Folders."](#)

6.4.4 Searching for Files from a Web Browser

A web browser plug-in may be available for an Oracle WebCenter Content Server instance which allows you to search for files on that server directly from your web browser search or address bar. Ask the server administrator if you are not sure whether the search plug-in has been enabled for a server.

See [Section 13.2, "Adding the Oracle WebCenter Content Search Provider in Your Web Browser"](#) for instructions on how to set up your web browser and [Section 13.4, "Searching for Managed Content in Your Web Browser"](#) for information on how to search for content items from your web browser.

Note: You can also search for content on an Oracle WebCenter Content Server instance using the server's web interface. For more information, see *Using Oracle WebCenter Content*.

6.5 Working with Saved Search Queries and Query Folders

When you perform a search query, the **Search Results** node in the integration hierarchy shows all content items on the server that meet the search criteria and for which you have access privileges on the server (subject to any limit that has been set to the number of results shown). If you want, you can save the most recent search query so you can easily run it again at a later time.

Each saved query and query/search results folder is dynamic, which means that every time you open it, the content pane shows all content items on the server that meet the search criteria at that particular moment. In other words, your saved queries and query/search results folders will always produce the latest search results.

It is important to note that saved query lists or query/search results folders show only content items that meet the search criteria, not shortcuts to content items or folder names, even if these meet the search criteria.

There may be a limit to the number of items shown in query/search results folders.

The items in saved query lists or query/search results folders are the actual files, not copies or pointers of some sort. Deleting a file from the search results removes it from

all folders and may remove the actual content item from the server (you are offered this as an option).

Saved Searches on Servers Using the Native 11g User Interface

To save the most recent search query, right-click the Search Results folder and choose **Save Query**. Enter a name for the query and click **OK** (or press Enter) to save it to **My Saved Queries** under My Content Server. See ["My Saved Queries"](#) on page 3-8 for further details.

You can right-click a saved query to choose **View Query Definition** to view (and modify, if required) its query definition. See *Using Oracle WebCenter Content* for more information on the query format.

You can also drag and drop the most recent search results (while holding the Ctrl key) or a saved query to anywhere within the content folders tree under Browse Content. This creates a **query folder**, which you can open to run the associated search query on the server. If you drag and drop a saved query, the default query folder name is the same name as the original saved query with 'Copy of' preceding it. If you drag and drop the search results, the default query folder name is 'Search Results'. You can rename query folders in the same way as other folders (see [Section 6.15, "Renaming Content Folders and Files"](#)). Query folders are marked in the integration hierarchy by a special icon ([Figure 6-2](#)).

Figure 6-2 Query Folder Icon



Saved Searches on Servers Using the WebCenter Content User Interface

You can drag and drop the most recent search results (while holding the Ctrl key) to any library or folder in the integration hierarchy.

6.6 Browsing to Content Files

In addition to searching for files (see [Section 6.4, "Searching for Content Files"](#)), you can also browse to a file on a content server and select it for further use. When browsing to a file, you navigate to it by moving down a tree structure on the server until you have located the file you want to work with.

To browse to a content file on a server:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server whose tree structure you want to browse. If prompted, log in by entering your user name and password for that server.
4. Move down the tree structure and select the file you want to work with. You can right-click a selected file to see a menu that provides a number of relevant options for that file in that particular context.

6.7 Creating New Content Files

Creating a new, managed content file from Windows Explorer basically consists of copying or saving a file to a content server. This checks the file in to the server as a new content item and makes it available to other users on the server in accordance with their assigned access privileges. There are various ways to upload a file to a server and check it in as a new content item:

- Copy and paste a file from your local computer to a library, folder, or profile on a server. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- Drag and drop a file from your local computer to a library, folder, or profile on a server. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- Move a file from your local computer to a library, folder, or profile on a server. For more information, see [Section 6.17, "Moving Libraries, Folders, and Files To and From a Server."](#)
- Double-click an existing, unmanaged Office document on your local computer to open it in its associated Office application (for example, Word for .doc or .docx files), and then check it in to a server using the **Save As New** option in the WebCenter Content menu or ribbon. For more information, see [Section 10.7, "Creating and Checking In a New Managed Document."](#)

Libraries are available on servers using the WebCenter Content user interface. You cannot add content files directly to the supplied Enterprise Libraries node, only to library nodes that have been created beneath them.

If the target library or folder node on the content server already contains a file of the same name as the file being copied or moved into that folder, then it is not checked into the server as a new content item. On Oracle WebCenter Content Server instances, the file is checked in as a new revision of the existing file (even though they may be completely different files). On Oracle Content Database servers and other WebDAV servers, the existing file in the folder is typically overwritten with the new file. For more information, see [Section 4.4, "Content File Versioning."](#)

6.8 Modifying Existing Content Files

If you want to modify an existing content file (that is, a file that is already managed on a content server), you must first check it out of the server. A copy of the content file is then downloaded from the content server and placed in temporary storage space on your computer (see [Section 4.6, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). For more information, see [Section 6.11, "Checking Out Content Files."](#) After you have checked out a file, you can modify it as needed, and check it back in to the server when you are done. See [Section 6.12, "Checking In Content Files."](#)

If you want to modify a managed Office document, you can open that document in its associated Office application. It is then automatically checked out of the content server. After editing the document, you can check it back in directly from the Office application (see [Section 10.8, "Saving and Checking In an Existing Managed Document"](#)) or from Windows Explorer (see [Section 6.12, "Checking In Content Files"](#)).

Checked-in email messages are not intended to be checked out, modified, and checked back in. Email messages are checked in to a content server for the express purpose of preserving them exactly as they were received. You can open a checked-in email

message from a server to view it in its associated email application (and even make changes if you want), but you cannot check it back in to the server. You can, however, send the message to other people or save a copy on your local computer. For more information, see [Section 12.9, "Opening Checked-In Email Messages."](#)

6.9 Viewing Content Files

When you view (rather than preview) a content file on a server, it remains checked in to the content server and a temporary copy is downloaded to your computer (see [Section 4.6, "Local Caching of Content Files"](#)). The file opens in its associated application in read-only mode. You can make changes to the file in the application, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item.

Note: In the WebCenter Content user interface, a read-only preview of a document is available (by selecting the Preview tab of the preview pane). Previews are not available in the native 11g user interface.

Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 4.7, "Content Management Actions on Files."](#)

To view a content item in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to view. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to view. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **View File From Server** or double-click the file to open the file in its associated application in read-only mode. If the file is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), the context menu also includes a **View** option. You can then choose which file version to open: the cached, typically newer version (**View**) or the latest released version on the server (**View File From Server**). If you view the file from the server, the locally cached file version is left untouched and remains available.

The **View** and **View File From Server** options are also available on the **File** menu.

Note: By default, when you double-click a file in the integration hierarchy of a server, you view the file. You may change this default behavior to open the file in full edit mode ('open' rather than 'view'). For more information, see [Section A.1, "Setting Windows Explorer Integration Options."](#)

6.10 Opening Content Files

When you open a content file on a server, it is checked out of the content server and a copy is placed in temporary storage space on your computer (see [Section 4.6, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). The file opens in its associated application in full edit mode. You can make changes to the file in the application as required and check it back in to the server as a new revision of the content item (see [Section 6.12, "Checking In Content Files"](#)).

If you open a managed Microsoft Office document in its associated application, it is automatically checked out of the content server. After editing the document, you can check it back in directly from the application (see [Section 10.8, "Saving and Checking In an Existing Managed Document"](#)) or from Windows Explorer (see [Section 6.12, "Checking In Content Files"](#)).

Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 4.7, "Content Management Actions on Files."](#)

To open a content item in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to open. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to open. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Open** to open the file in its associated application in full edit mode. If the file is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.

If the file was already checked out earlier (for example, using the **Check Out** option), you can choose **Open with...** to select the application with which to open the selected file (rather than the application associated with the file type). The list of available applications is exactly the same as for other, unmanaged files of the same type on your computer. Using this option may be useful if, for example, you want to open a managed web or media file in an editor rather than a viewer, which is often the default application for these file types. You can then edit the file as needed and then check it back in to the server.

The **Open** and **Open with...** options are also available on the **File** menu.

Note: By default, when you double-click a file in the integration hierarchy of a server, you view the file. You may change this default behavior to open the file in full edit mode ('open' rather than 'view'). For more information, see [Section A.1, "Setting Windows Explorer Integration Options."](#)

6.11 Checking Out Content Files

When you check out a file from a content server, the file is downloaded from the server and a copy is placed in temporary storage space on your computer (see [Section 4.6, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out").

If you check out a file in Windows Explorer, the checked-out file is not opened in its associated application. (This is how checking out a file is different from opening it.) You can process the file as desired, and check it back in to the server when you are ready (see [Section 6.12, "Checking In Content Files"](#)). As long as the file is checked out, its file icon shows the checked-out status by a green check mark overlay of the application icon ([Figure 6-3](#)).

Figure 6-3 *Checked-out Microsoft Word Document*



Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 4.7, "Content Management Actions on Files."](#)

The following sections provide more information about checking out files:

- [Section 6.11.1, "Checking Out Files"](#)
- [Section 6.11.2, "Opening Checked-Out Files"](#)
- [Section 6.11.3, "Undoing a File Check-Out"](#)
- [Section 6.11.4, "Viewing All Your Checked-Out Files"](#)

6.11.1 Checking Out Files

To check out a file in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to check out. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to check out. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Check Out**. Alternatively, open the **File** menu and choose **Check Out**. (These options are available only if the selected file is currently not checked out.)

The file is checked out of the server and its application icon shows a green check mark to indicate its checked-out status. You can now work with the file as needed, and check it back in to the server when you are done.

6.11.2 Opening Checked-Out Files

You can easily open checked-out files in the application associated with their file type or a different application:

To open checked-out files:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the checked-out file you want to open. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to open. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose either of the following options:
 - **Open:** Opens the selected file in the application associated with its file type (for example, Microsoft Word for .doc and .docx files).
 - **Open With...:** Allows you to choose the application with which to open the selected file (rather than the application associated with the file type). The list of available applications is exactly the same as for other, unmanaged files of the same type on your computer. Using this option may be useful if, for example, you want to open a managed web or media file in an editor rather than a viewer, which is often the default application for these file types.

The **Open** and **Open with...** options are also available on the **File** menu.

Once you are done editing the file, you can check it back in to the server. See [Section 6.12, "Checking In Content Files."](#)

Note: You do not have to check out a file before choosing **Open** in the context menu as this action automatically checks out the file for you. However, for the **Open with...** option to be available, you must first check out the file.

6.11.3 Undoing a File Check-Out

You can undo the check-out of a content file; that is, cancel the checked-out status of the file on the server. The file lock is then removed on the server and other content server users may check out the file. No changes are made to the file. You can only undo the check-out of files you have checked out yourself, unless you have administrator privileges on the server.

To undo the check-out of a file on a content server:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file whose check-out you want to undo. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server whose check-out you want to undo. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Undo Check Out**. Alternatively, open the **File** menu and choose **Undo Check Out**. (These options are available only if the selected file is currently checked out.)

The file is no longer checked out and its application icon no longer shows a green check mark. Other users on the server can now check out the file.

6.11.4 Viewing All Your Checked-Out Files

You can view all files that you have currently checked out of an Oracle WebCenter Content Server instance in one convenient list. This enables you to check the file status, process the files, or cancel their checked-out status.

Note: This is available only if you are connecting to a Content Server 11g instance.

To see a list of all your checked-out files on a content server:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 5.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server for which you want to see all your checked-out files. If prompted, log in by entering your user name and password for that server.
4. Do one of the following:
 - If you are using the WebCenter Content user interface, select the **My Checked-Out Content** node.
 - If you are using the native 11g user interface, open the **My Content Server** node and then click **My Checked-Out Content**.

If the server does not have a node called My Checked-Out Content, then it is not a Content Server 11g instance.

The content pane lists all files that you have currently checked out on the current content server. All items show a green check mark in their icons to indicate their checked-out status ([Figure 6-4](#)). Also, you see only files that you checked out yourself, not other users' checked-out files.

Figure 6-4 Word Document Checked Out By Yourself



You can work with the files in this list as you would with other content files; however, you cannot delete or rename files in your list of checked-out files. To check a file back in to the server, right-click the file and choose **Check In**. To cancel the checked-out status of a file, right-click it and choose **Undo Check-Out**.

6.12 Checking In Content Files

When you check a file in to a content server, it is uploaded and stored on that server. Other users on the server have access to it in accordance with their assigned privileges.

If you check a currently checked-out file back in to an Oracle WebCenter Content Server instance, this file is checked in as a new revision of the existing content item. On Oracle Content Database servers and other WebDAV servers, the file that is checked in

will typically overwrite the existing file on the server. See [Section 4.4, "Content File Versioning"](#) for more information.

You can check files in to a server only if you checked out that file yourself, or if you have administrator privileges for that server.

You can check in a file only if it has been changed since it was checked out. If it has not been changed, you can choose to undo the check-out instead.

Note: For more information on checking in email messages and their attachments, see [Section 12.5, "Checking In Email."](#) For details on checking in Microsoft Office documents from within Office applications, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)

When checking in files from Windows Explorer, you may check in existing content files (that is, files that are already managed on a content server) or new content files (that is, files that are not yet managed).

Checking In Previously Checked-Out Files

To check in a file that was previously checked out (see [Section 6.11.1, "Checking Out Files"](#)):

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Locate and select the content item on the server that you want to check in to the server. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#) All files that you checked out yourself have a green check mark in their file icons. You can see a list of all files that you have currently checked out of an Oracle WebCenter Content Server instance by opening the My Checked-Out Content node (if available). You can check files in to the server directly from that list.
4. Right-click and choose **Check In**. Alternatively, open the **File** menu and choose **Check In**. (These options are available only if the selected file is currently checked out and has been changed since it was checked out.)

The file is uploaded from your local cache to the server and checked back in. Its application icon no longer shows a green check mark. Other users on the server can now check out the file again.

Checking In New Files

You can check new, unmanaged files in to a content server and make them available to other users on that server in a variety of ways:

- By copying and pasting a file from your local computer to a library, folder or profile on a server. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- By dragging and dropping a file to a library, folder or profile on a server. For more information, see [Section 6.16, "Copying Libraries, Folders, and Files."](#)
- By moving a file to a library, folder or profile on a server. For more information, see [Section 6.17, "Moving Libraries, Folders, and Files To and From a Server."](#)

Considerations

- When you check in an existing file on an Oracle WebCenter Content Server instance, it is checked in as a new revision of the existing content item. You can see the revision history of a file on its content information page on the server.
- When a file is copied or moved to a library or folder node on a content server, it is checked in to that server as a new content item only if that node does not yet contain a file with the same name. Otherwise, the file is checked in as a new revision of the existing file (even though they may be completely different files). For more information, see [Section 4.4, "Content File Versioning."](#)
- If you want to check in a new content item, but do not want to assign it to a content folder, then you can drag-and-drop or copy-and-paste it into any of the content profiles under **New Check-In**. This opens the Check In Content dialog, where you can provide profile-specific metadata before check-in.
- When you check in a local copy of a managed file (for example, one that was emailed to you), you may see a warning that it is not currently checked out and that the file has been changed on the server (that is, there is a newer revision on the server). You can then choose to open the current file or the latest revision from the server.
- When you drag and drop or copy and paste a new file to an Oracle WebCenter Content Server instance, you may be asked to provide metadata for the file, depending on the settings for the target document library or content folder (see [Section 4.11, "Enabling Metadata Prompting for Enterprise Libraries and Folders"](#)). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the target library or folder (see [Section 4.5, "Content File Metadata"](#)).
- If Oracle WebCenter Content: Records is installed on Oracle WebCenter Content Server with its DoD compliance features enabled, then you may not be able to check in files by copying and pasting or dragging and dropping them into content folders. This is because the DoD compliance features make the Category or Folder field required, which means an item cannot be checked in if this field is empty. Since copying and pasting or dragging and dropping a file into a content folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured Records to enable such check-ins. (Oracle WebCenter Content: Records cannot be used with a server that is using the WebCenter Content user interface.)

6.13 Viewing and Modifying Library, Folder, and Content Information

You can view library, folder, and content information held on an Oracle WebCenter Content Server 11g instance. You can sometimes modify this information. On servers running the WebCenter Content user interface, content information includes a preview of the content, if this is renderable.

Note: Libraries are available only if you are connected to a WebCenter Content Server 11g instance running the WebCenter Content user interface.

Caution: Be careful when changing the security group of a library, folder, or file. If you assign these to a more restrictive security group, authors may no longer have permission to manage their own content items.

To view and modify the library, folder or content information:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the library, folder or file whose information you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the library, folder, or file whose information you want to view or modify.

See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)

5. Access the information in one of the following ways:

- View it in the preview pane.

See [Section 5.13.2, "Showing or Hiding the Preview Pane."](#)

- View it in the information page.

Open the information page by right-clicking the folder or file and choosing **Library Information, Folder Information** or **Content Information**.

See *Using Oracle WebCenter Content* for more information on content information and metadata.

In the native 11g user interface, a bar at the top of the information page shows the available actions for the content folder and file.

In the WebCenter Content user interface, the information is divided between tabbed pages that may have selection and editing controls.

6. If you are using a server running the native 11g user interface, modify and save the information as follows:

- a. On the information page, open the **Folder Actions** menu (for folders) or the **Content Actions** menu (for files), then choose **Update**.

You may also be able to right-click the folder or file in the navigation pane or content pane and choose **Update Metadata** (or to select the folder or file in the navigation pane and select **Update Metadata** from the **File** menu).

- b. Make the changes to the information.
- c. Click **Submit Update** to save the changes.

The changes take effect immediately.

7. If you are using a server running the WebCenter Content user interface, modify and save the information as follows:

- a. In the preview pane or the information window, select the tab containing the information that you want to change.
- b. If you are changing the profile metadata for a content file, click the **Edit** button.
- c. Make the changes to the information.
- d. Click **Save** to save the changes.

The changes take effect immediately.

6.14 Viewing and Modifying Library, Folder and File Properties

You can view the properties of a document library, content folder ,or file and modify some of them:

- [Section 6.14.1, "Viewing and Modifying Properties of Libraries, Folders or Files"](#)
- [Section 6.14.2, "Viewing and Modifying Advanced Properties of Folders or Files"](#)
- [Section 6.14.3, "Viewing and Modifying Sharing Properties of Folders or Files"](#)

Note: Libraries are available only if you connected to a WebCenter Content Server 11g instance running the WebCenter Content user interface.

6.14.1 Viewing and Modifying Properties of Libraries, Folders or Files

To view and modify some Windows properties of a library, folder, or file:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the library, folder or file whose properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose properties you want to view or modify. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Properties**. Alternatively, open the **File** menu and choose **Properties**.

The Folder Properties dialog or Content Item Properties dialog opens. These are basically standard Windows properties dialogs, with some added content management information.

6. If required, you can change the folder or file name in the Name field. The name change will take effect immediately. The name is also changed on the content server, which means that everyone using that server who views the folder or file will see it by its new name.
7. Click **OK** when you are done.

6.14.2 Viewing and Modifying Advanced Properties of Folders or Files

You can view the advanced properties of folders and files on an Oracle Content Database server. This enables you to check and manage these properties, depending on your assigned security privileges.

Note: This is not available on Oracle WebCenter Content Server instances or other, non-Content DB WebDAV servers.

To view the advanced Oracle Content DB properties of a folder or file on an Oracle Content Database server:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.

3. Open the Oracle Content Database server that stores the folder or file whose advanced properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose advanced properties you want to view or modify. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Advanced Properties**. Alternatively, open the **File** menu and choose **Advanced Properties**.

A folder or content information window opens showing general Oracle Content Database properties of the selected folder or file.

6.14.3 Viewing and Modifying Sharing Properties of Folders or Files

You can view the sharing properties of folders and files on an Oracle Content Database server. This enables you to check and manage these properties, depending on your assigned security privileges.

Note: This is not available on Oracle WebCenter Content Server instances or other, non-Content DB WebDAV servers.

To view the sharing Oracle Content DB properties of a folder or file on an Oracle Content Database server:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle Content Database server that stores the folder or file whose sharing properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose sharing properties you want to view or modify. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Sharing**. Alternatively, open the **File** menu and choose **Sharing**.

A folder or content information window opens showing the sharing Oracle Content Database properties of the selected folder or file. Depending on your assigned security privileges, you can determine which users have access to that folder or file and which roles they have been granted.

6.15 Renaming Content Folders and Files

You can rename libraries, folders, and files in the integration hierarchy in much the same way as other folders and files on your computer.

You cannot rename the supplied library and folder nodes (such as My Checked-Out Content).

Renaming Libraries, Folders, and Files Directly in the Integration Hierarchy

To rename a library, folder, or file from the integration hierarchy:

1. Open Windows Explorer.

2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the library, folder or file you want to rename. If prompted, log in by entering your user name and password for that server.
4. Locate and select the library, folder, or file on the server you want to rename. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Rename**. Alternatively, open the **File** menu and choose **Rename**. (Pressing **F2** on your keyboard may also work.)
6. Provide the new name of the folder or file, and press Enter.

Renaming Libraries, Folders, and Files From the Properties Dialog

To rename a library, folder, or file from its properties dialog:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the library, folder or file you want to rename. If prompted, log in by entering your user name and password for that server.
4. Locate and select the library, folder, or file on the server you want to rename. See [Section 6.4, "Searching for Content Files"](#) or [Section 6.6, "Browsing to Content Files."](#)
5. Right-click and choose **Properties**. Alternatively, open the **File** menu and choose **Properties**.

The Folder Properties dialog or File Properties dialog opens.

6. Provide the new name of the folder or file, and click **OK**.

Renaming Libraries and Folders on Their Information page

To rename a library or folder from its information page:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the library or folder you want to rename. If prompted, log in by entering your user name and password for that server.
4. Locate and select the library or folder in the content pane.

The information page of the selected folder is displayed in the preview pane (if enabled).

5. If you are using a server that is running the native 11g user interface:
 - a. Open the **Folder Actions** menu and then choose **Update** to open the Hierarchy Folder Configuration page.

If the Folder Actions menu does not have an Update option, then you do not have sufficient privileges on the server to perform that action.

Alternatively, open the **Edit** menu and then click **Folder Information**.

- b. Provide the new folder name in the **Folder Name** or **Virtual Folder Name** field.
6. If you are using a server that is running the WebCenter Content user interface:

- On the General tab in the preview pane, provide the new library or folder name.
7. When you are done, click **Save** or **Submit Update** to save the changes. The changes take effect immediately.

Considerations

- When you rename a library or folder on your local computer, this is reflected on the content server (and vice versa).
- You cannot rename a file if it is currently in the local cache (for example, because it is checked out of the content server). See [Section 4.6, "Local Caching of Content Files."](#)
- On Oracle WebCenter Content Server, the title of a content file may (initially) be based on its file name. If you change the file name in the integration hierarchy, its title is not automatically modified to reflect the new file name (or vice versa).
- If you rename a library, folder, or file, the names of any shortcuts to the library, folder, or file are not updated automatically.

6.16 Copying Libraries, Folders, and Files

You can copy and paste items managed by a content server in much the same way as other files on your computer. After selecting the libraries, folders, or files to be copied, you can use all standard Windows methods of copying and pasting items:

- Right-click and choose **Copy** or **Copy File From Server**. Then, at the target location, right-click and choose **Paste**.
- Press **Ctrl+C** on your keyboard. Then, at the target location, press **Ctrl+V**.
- Choose **Copy** from the **Edit** menu. Then, at the target location, choose **Paste** from the **Edit** menu. (This is supported only in Windows Explorer, not in email applications.)
- Drag and drop the selected libraries, folders, and/or files to the target location.

Considerations

- Copied libraries are not pasted to their destination as libraries. Instead, they are pasted as content folders.
- If you want to drag and drop files to a content folder on the same server, make sure to hold the Ctrl key while doing it. Otherwise the content item will be moved rather than copied.
- You cannot copy a file to the same folder as the one it is in.
- The file name and title of the copied file are the same as for the original file, but you can, of course, change these afterwards. The copied file does have a different content ID as it is a separate content item on the server.
- If a file to be copied is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), the context menu includes both a **Copy** and **Copy File From Server** option. You can then choose which file version to copy: the cached, typically newer version (**Copy**) or the latest released version on the server (**Copy File From Server**).
- All other copy methods will copy the locally cached file version if it exists, and otherwise the latest released revision from the server.

- You cannot copy content files to query folders.
- If Oracle WebCenter Content: Records is installed on Oracle WebCenter Content Server with its DoD compliance features enabled, then you may not be able to check in files by copying and pasting or dragging and dropping them into content folders. This is because the DoD compliance features make the Category or Folder field required, which means an item cannot be checked in if this field is empty. Since copying and pasting or dragging and dropping a file into a content folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured Records to allow such check-ins. (Oracle WebCenter Content: Records cannot be used with a server that is using the WebCenter Content user interface.)
- Use the menu copy-and-paste options (not keyboard commands) when copying items between Lotus Notes and Windows Explorer. Lotus Notes has an internal clipboard and data from that clipboard is retained when using keyboard copy-and-paste commands. For example, if you use the keyboard to copy a Lotus Notes memo to your clipboard, paste it into a folder on a content server, then copy a file from Windows Explorer and attempt to paste it into the same content server folder, the result is the previous Lotus Notes memo.
- See also [Section 6.21.4, "Copying Library, Folder, and File Shortcuts."](#)

Copying Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows (to the extent that Windows allows this) and copy them all at the same time. If multiple files are to be checked in to the content server as a result of the copy action, a dialog may open for you to provide metadata for the files before checking them in.

Copy Sources and Targets

You can copy items between various sources and targets:

- **From an unmanaged location to a content server:** When you copy a file from an unmanaged location (for example, a folder on your local computer outside the integration hierarchy or a shared network location) to a content folder on a server in the integration hierarchy, then this file is checked in to that server. This turns the file into a managed content item on the server and makes it accessible to other users on that server. Depending on how the content server is set up, you may be prompted to provide metadata for the copied file before it is checked in.

If you copy a folder, then all files in that folder (including subfolders) are checked in to the server as separate content items with their own content IDs. The folder is included in the integration hierarchy for everyone with the appropriate access privileges to see.

- **From a content server to an unmanaged location:** When you copy a file from a content folder on a server in the integration hierarchy to an unmanaged location (for example, a folder on your local computer outside the integration hierarchy or a shared network location), then this file becomes an unmanaged file. The copied file is not managed by the content server, and it is not accessible to users on that server (of course, the original content item on the server is still accessible).

If you copy a folder, then all files in that folder (including subfolders) are copied to the target location.

If you copied Microsoft Office documents, you may be able to check them back in to their originating Oracle WebCenter Content Server instance, even if they are in a location outside the integration hierarchy. This depends on how the content server

is set up; specifically, whether the DesktopTag feature is enabled. If this is the case, the Microsoft Office documents contain embedded information about the server location where they originated. This enables these documents to be uploaded to that same server location. You check these documents in using the WebCenter Content menu or ribbon in the Microsoft Office application. For more information, see [Section 9.6, "Microsoft Office Document Properties."](#)

- **Within the content folder structure of the same server:** When you copy a file from a content folder on a server in the integration hierarchy to a different folder on the same server, then a new content item is checked in to the server with a new content ID. This means that the server now stores two copies of the same file (in two different locations). These files are in no way connected; they are completely separate entities. Any changes to one file do not affect the other, and vice versa. The new content item keeps all the metadata from the original file, including the security group. However, if the folder you copy the file into has the Force Folder Security property set to 'True', then the copied file has its security group changed to match that of the target folder.

Note: If you want to copy files to a content folder on the same server, make sure to hold the Ctrl key while doing it. Otherwise the content item will be moved rather than copied.

- **Between two different content servers:** In addition to copying a file within the same content server, you can also copy a file between different servers in the integration hierarchy. When you copy and paste between servers, the file you paste to the new location is checked in to that content server as a new, separate content item with a new content ID, unless a content item with the same file name and extension already exists in the folder. In that event, the copied file is checked in to the content server as a new revision to the existing file.

When a new content item is checked in to the folder on the target server, you may be prompted to provide metadata for the new item. This happens if the target server is an Oracle WebCenter Content Server 11g instance and metadata prompting has been enabled for the folder. You are also prompted for metadata if any required metadata is missing regardless of the metadata prompting setting. The default metadata values in the check-in form will be the ones specified for the content folder that the file was copied into.

6.17 Moving Libraries, Folders, and Files To and From a Server

You can move items to and from a content server in much the same way as other files on your computer. After selecting the libraries, folders, or files to be moved, you can use all standard Windows methods of moving items:

- Right-click and choose **Cut**. Then, at the target location, right-click and choose **Paste**.
- Press **Ctrl+X** on your keyboard. Then, at the target location, press **Ctrl+V**.
- Choose **Cut** from the **Edit** menu. Then, at the target location, choose **Paste** from the **Edit** menu. (This is supported only in Windows Explorer, not in email applications.)
- Drag and drop the selected libraries, folders, and/or files to the target location within the integration hierarchy.

Considerations

- Some of the Windows methods for moving items may not be available when moving items from and to the same server.
- If Oracle WebCenter Content: Records is installed on Oracle WebCenter Content Server with its DoD compliance features enabled, then you may not be able to check in files by cutting and pasting them into content folders. This is because the DoD compliance features make the Category or Folder field required, which means an item cannot be checked in if this field is empty. Since cutting and pasting a file into a content folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured Records to enable such check-ins. (Oracle WebCenter Content: Records cannot be used with a server that is using the WebCenter Content user interface.)
- If you drag and drop files to a library or folder on the same server, you can hold the Ctrl key to copy rather than move them.

Moving Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows (to the extent that Windows allows) and move them all at the same time. If multiple files are to be checked in to the content server as a result of the move action, a dialog may be displayed where you can provide metadata for the files before checking them in. This happens if the target server is an Oracle WebCenter Content Server 11g instance or Oracle Content DB instance and metadata prompting has been enabled for the folder. You are also prompted for metadata if any required metadata is missing regardless of the metadata prompting setting.

Move Sources and Targets

You can move items from unmanaged locations to a content server or between folders on the same server; you cannot move content items from a server to somewhere else outside of that server.

When you move a file from an unmanaged location (for example, a folder on your local computer outside the integration hierarchy or a shared network location) to a content folder on a server in the integration hierarchy, then this file is checked in to that server. This turns the file into a managed content item on the server and makes it accessible to other users on that server. Depending on how the content server is set up, you may be prompted to provide metadata for the copied file before it is checked in.

If you move a folder, then all files in that folder (including subfolders) are checked in to the server as separate content items with their own content IDs. The folder is included in the integration hierarchy for everyone with the appropriate access privileges to see.

Changing the Folder Location of Content Items

On Oracle WebCenter Content Server instances running Framework Folders, if you move an existing content item to a different folder in the integration hierarchy, you change its folder location, or more precisely, its virtual folder association on the content server.

If you move a content item to a folder on the server that already contains a content item with the same file name, then you are prompted whether this new file should replace the existing file in the folder (similar to what happens when copying or moving files on your file system). If you confirm the action, the new content item takes the place of the old one in the content folder. It is not checked in as a new revision of the old content item. The old content item is not removed, though, it just loses its folder association (so it is not "overwritten" as files on your file system are). It is still on

the content server and you can search for it. For example, imagine the content folder 'Sales' contains a content item named 'Report 2011.docx', which has four revisions, and the content folder 'Marketing' also contains a file with that same name, which has two revisions. If you move the file from the 'Sales' to the 'Marketing' folder and choose to replace that file, then the 'Marketing' folder will only contain the file moved from the 'Sales' folder, which still has four revisions. The original file in the 'Marketing' folder is no longer associated with that folder, but it is still on the content server (with two revisions).

Tip: You can easily change the folder location of a content item, or assign it to a folder if it had not been before, by searching for it and then dragging and dropping it from the search results node to the target content folder in the integration hierarchy.

6.18 Deleting Libraries, Folders, and Files

You can delete items managed by a content server in much the same way as other files on your computer. After selecting the libraries, folders, and/or files to be deleted, you can use all standard Windows methods of deleting items:

- Right-click and choose **Delete**.
- Press Delete on your keyboard.
- Choose **Delete** from the **File** menu. (This is supported only in Windows Explorer, not in email applications.)

Considerations

- You should be very careful deleting a library or folder. If you delete one, all subfolders and all revisions of all content items in that folder may also be deleted, which may affect everyone who uses that content server.
- To delete a content item, you must have Delete permission for the security group of that content item.
- Depending on how the folders functionality has been set up on Oracle WebCenter Content Server, you may be prompted whether just the file entry should be removed from the content folder or also the actual content item from the server.
- When you delete a library, folder, or file, it may be permanently deleted or moved to a Trash folder, depending on the content server configuration (specifically, its folders component). See *Using Oracle WebCenter Content* for more information.
- To delete a library or folder, you must be the owner of the library or folder or have Delete permission for the library's or folder's security group, and you must have Delete permission for the security groups of all subfolders and content items within the library or folder.
- If you have permission to delete a library or folder, the library or folder and all its contents will be deleted from the content server. If, during the delete process, the system encounters content that you do not have permission to delete, the delete process will end at that item, and the remainder of the content in the library or folder will be retained.
- You cannot delete the main nodes of an Oracle WebCenter Content Server instance (such as My Content Server, Browse Content, and so on, or Enterprise Libraries, Favorites, My Checked-Out Content, and so on).
- See also [Section 6.21.5, "Deleting Content Folder and File Shortcuts."](#)

6.19 Propagating Library and Folder Metadata

You can copy the metadata of a library or folder on an Oracle WebCenter Content Server instance to all its sublibraries, subfolders, and files. This feature is available only if the content server administrator has enabled it on the server and if you have the required permission level. To propagate metadata to content items in a folder, you must have Write permission for the library or folder and the content items themselves. To propagate to any libraries or folders below the library or folder in the hierarchy, you must have Delete permission for the libraries or folders or be the author and have Write permission.

The content ID and title of items are always considered properties specific to those items and are never automatically propagated. Also, a library or folder can be excluded from metadata propagation from a higher-level one by setting its Inhibit Propagation property on the Hierarchical Folder Configuration page to 'True'.

To propagate the metadata of a library or folder to all underlying libraries, folders, and files:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle WebCenter Content Server instance that stores the library or folder whose metadata you want to propagate. If prompted, log in by entering your user name and password for that server.
4. Right-click the library or folder in the integration hierarchy whose metadata you want to propagate.
5. Choose **Propagate**.
6. If the content server is running Framework Folders or the WebCenter Content user interface, a dialog opens where you can specify which metadata fields and values you want to propagate before starting the process. Otherwise, all metadata fields and values are propagated.

The (selected) library or folder metadata is now copied to all underlying libraries, folders, and files, unless a library or folder was specifically excluded from metadata propagation on its configuration page (using the Inhibit Propagation property).

6.20 Showing or Hiding Unpublished Content Files

By default, *all* content items assigned to a library or folder on an Oracle WebCenter Content Server instance are displayed in the integration hierarchy regardless of their release state. This means the list may include unreleased (unpublished) files; that is, any content items on the server that are currently in a workflow, have not yet been fully converted or indexed, or have a future release date. Unreleased files are displayed in a different color in the content pane, typically green (Figure 6–5).

Figure 6–5 Unpublished Files



Note: Color differentiation of unpublished files is available only if the 'Show encrypted or compressed NTFS files in color' option is enabled in Windows Explorer (Tools, then Folders Options, then View).

If the content server is using Framework Folders to provide the folders functionality, you can change the list display to exclude these 'unpublished' content items.

To change the list display:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle WebCenter Content Server instance that stores the folder whose contents you want to see. If prompted, log in by entering your user name and password for that server.
4. Select that folder in the integration hierarchy or content pane.
5. Right-click and choose **Show Only Published Content** to toggle between the display mode to include or exclude unreleased content items in the list. Alternatively, open the **File** menu and choose **Show Only Published Content**.

If there are any unpublished files in the current folder, they will show in a different color (typically green) or disappear from the list.

Note: This setting applies to *all* content folders on the current server until you change it again.

6.21 Working with Shortcuts to Content Libraries, Folders, and Files

This section covers these topics:

- [Section 6.21.1, "About Content Library, Folder, and File Shortcuts"](#)
- [Section 6.21.2, "Creating Content Library, Folder, and File Shortcuts"](#)
- [Section 6.21.3, "Renaming Library, Folder, and File Shortcuts"](#)
- [Section 6.21.4, "Copying Library, Folder, and File Shortcuts"](#)
- [Section 6.21.5, "Deleting Content Folder and File Shortcuts"](#)

6.21.1 About Content Library, Folder, and File Shortcuts

You can create shortcuts to libraries, folders and files on a content server so you can quickly access information that you use often. You can create two types of shortcuts:

- Oracle WebCenter Content Server shortcuts
- standard Windows shortcuts

You create these shortcuts in different ways and they behave slightly differently.

Oracle WebCenter Content Server Shortcuts

Unlike standard Windows shortcuts, Oracle WebCenter Content Server shortcuts are not link files (.lnk), but rather copies of the referenced file. As long as they reside in the integration hierarchy of a content server, they are tightly linked to the item they reference. Their context menus have the exact same options as those of the original

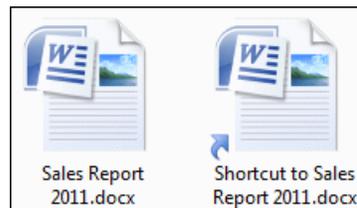
item. This means, for example, that you can check out a content file through its shortcut context menu. Also, the icons of file shortcuts reflect the current content management status of the original files. For example, if the original file is currently checked out of the content server, all shortcuts to that file will also show the checked-out icon (see [Section 4.8, "Content File Status"](#)). Shortcuts to content items are never included in search results lists, even if these content items meet the search criteria.

When you create a shortcut to a content library, folder, or file in the integration hierarchy, its name is the original folder or file name preceded by "Shortcut to," for example "Shortcut to Sales Report 2011.docx." In addition, the shortcut icon shows a small arrow symbol in the bottom left corner to indicate it is a reference to another item ([Figure 6-6](#)). (This link symbol is slightly different from standard Windows shortcuts, which visually reminds you this is a Desktop shortcut.)

The shortcut is placed in the same location as the original item: a shortcut to a file is in the same content folder as the file it references, and a shortcut to a folder is a folder at the same level as the original folder (preceded with "Shortcut to"). You can rename shortcuts as desired, and also copy them to other locations in the integration hierarchy of the same server or to a different server (see [Section 6.21.4, "Copying Library, Folder, and File Shortcuts"](#) below).

Important: If you copy or move the shortcut to a location outside the Oracle WebCenter Content Server hierarchy (for example, to your desktop), the shortcut may lose its link to the original item, depending on the content server configuration, and you may not be able to check a file back in to the server as a new revision of the existing content item when you open it.

Figure 6-6 Original File with Shortcut



When you double-click a shortcut to a content library or folder, its contents are displayed. When you double-click a shortcut to a content file, it is checked out of the content server (providing it is available and if you have permission to check it out) and opened in its associated application (see [Section 6.9, "Viewing Content Files"](#)).

If you hover the mouse cursor over an Oracle WebCenter Content Server shortcut, you see content information for its associated item, such as the content ID, file size, and the like.

Standard Windows Shortcuts

In addition to the special Oracle WebCenter Content Server shortcuts, you can also create standard Windows shortcuts to content libraries, folders, and files on a server. The shortcut is then a link file (.lnk) that points to the full URL of the referenced file or folder. If you hover the mouse cursor over a standard Windows shortcut, you see the URL of the referenced item.

When you double-click a shortcut to a content library or folder, its contents are displayed. When you double-click a shortcut to a content file, it is opened in its associated application in view mode. By default, you cannot check the file back in to the server as a new revision of the original content item.

6.21.2 Creating Content Library, Folder, and File Shortcuts

There are different ways to create a shortcut to a content library, folder, or file.

Special Oracle WebCenter Content Server Shortcuts

To create a special Oracle WebCenter Content Server shortcut, do one of the following:

- Select a library, folder, or file on a content server, right-click, and then choose **Create Shortcut**.
- Select a file on a content server, open the **File** menu, then choose **Create Shortcut**.

Both methods create an Oracle WebCenter Content Server shortcut in the same location as the original item (preceded by "Shortcut to"). You can copy or move these special shortcuts to other locations within the WebCenter Content Servers hierarchy, for example to a single folder from where you will have easy access to your most important documents. If, however, you move these special shortcuts to a location outside the WebCenter Content Servers hierarchy, such as your desktop, they may stop behaving like special shortcuts.

Standard Windows Shortcuts

To create a standard Windows shortcut:

1. Within the WebCenter Content Servers hierarchy, select the library, folder, or file to which you want to create a shortcut.
2. From the **Edit** menu, select **Copy**.
3. At a location outside the WebCenter Content Servers hierarchy (for example, your desktop), right-click and choose **Paste Shortcut**.

This procedure creates a standard Windows shortcut, from which the following operations are available:

- **For content items**

Double-click (or select **View File From Server** from the context menu) to open the content item in its associated application as a local copy of the managed item.

Select **Open File Location** from the context menu to open Windows Explorer with the content item highlighted in the content pane.

- **For libraries and folders**

Double-click (or select **Open** from the context menu) to open Windows Explorer with the server node highlighted in the folders pane.

Select **Open Folder Location** from the context menu to open Windows Explorer with the library or folder highlighted in the content pane.

6.21.3 Renaming Library, Folder, and File Shortcuts

You can rename special shortcuts to items within the WebCenter Content Servers hierarchy: Select the shortcut and press **F2**, or right-click and choose **Rename**. Renaming a special shortcut does not affect the name of the original file and vice versa.

You cannot rename standard Windows shortcuts created from managed content items.

6.21.4 Copying Library, Folder, and File Shortcuts

You can copy and paste special shortcuts to items within the WebCenter Content Servers hierarchy. After selecting the shortcut to be copied, you can use the following standard Windows methods of copying and pasting it:

- Right-click and choose **Copy**. Then, at the target location, right-click and choose **Paste**.
- Press **Ctrl+C** on your keyboard. Then, at the target location, press **Ctrl+V**.
- Choose **Copy** from the **Edit** menu. Then, at the target location, choose **Paste** from the **Edit** menu. (This is supported only in Windows Explorer, not in email applications.)
- Drag and drop the selected folders and/or files to the target location.

If you copy an Oracle WebCenter Content Server shortcut to a location outside the WebCenter Content Servers hierarchy (for example, your desktop), the item copied is not a shortcut, but the actual file, which is no longer linked to the original file. This means that you cannot check the file back in to the server as a new revision of the original file.

6.21.5 Deleting Content Folder and File Shortcuts

You can delete special shortcuts to items within the WebCenter Content Servers hierarchy. After selecting the shortcut to be deleted, you can use the following standard Windows methods of deleting it:

- Right-click and choose **Delete**.
- Press **Delete** on your keyboard.
- For shortcuts to content items, choose **Delete** from the **File** menu. (This is supported only in Windows Explorer, not in email applications.)

Note: When you delete a shortcut, only the shortcut itself is deleted. The folder or file on the content server that the shortcut pointed to remains intact.

6.22 Working with Your Personal Folders

Note: This section applies only to WebCenter Content Server instances running the native 11g user interface.

If Oracle WebCenter Content Server is running Framework Folders, then all authenticated users on the content server have their own personal folders, which allow you to set up 'favorites' to content items or folders on the server. You can create subfolders and add content items to your personal folders in the same way you do with other folders in the hierarchy. You can also store query folders in your personal folders tree.

Note: Even though all authenticated users on the server have their own personal folders, you can see only yours unless you have administrator privileges.

You can find your personal folders in the Desktop integration hierarchy in two places:

- Under **My Content Server, My Folders**, and
- Under **Browse Content, Users**, *USER_NAME* (for example, jsmith).

The personal folder trees in these locations are exactly the same, and you can work with the content in the folders from either location.

It is important to note that all content items in your personal folders are the actual files, not copies or pointers of some sort. You can interact with content items in your personal folders just as you could any other content item on the server. If you delete a file from a personal folder, you are removing the actual content item from the content server.

6.23 Copying Content File Links

You can copy URL links to one or more content items on a server to the Windows clipboard and paste that information into an e-mail message, text editor, Office document, or another business document. For files on an Oracle WebCenter Content Server instance, three URL links are copied for each content item: to the web-viewable file, the native file, and the content information page. For files on an Oracle Content Database server or other WebDAV server, only one link is copied: the URL of the file on the server.

To copy content file links, select one or more files in the integration hierarchy, right-click, and click **Copy Links** on the context menu. Alternatively, for a single file, open the **File** menu and choose **Copy Links**. The link information is copied into the Windows clipboard, so that you can easily paste it into another file or application.

Note: See [Section 12.6, "Inserting Links to Content Files on a Server into Email"](#) for information on including content file links in email messages.

6.24 Creating a List of Favorite Content Items

Oracle WebCenter Content Server 11gR1 (11.1.1.8.0) or higher instances running the WebCenter Content user interface include a node for content favorites.

If you frequently access certain content items and do not want to search through the integration hierarchy each time you want to use them, you can gather them together under your Favorites node.

If you add a library or folder to your Favorites node, that library or folder and all the content items in it will be added.

You cannot add the My Checked-Out Content, New Check-In, or Other Folders nodes to your favorites.

To add a library, folder, or file to your Favorites node, right-click the library, folder, or file and select **Favorite**. (To remove the item from your Favorites node, repeat the selection.)

Working with Managed Content in Workflows

This section covers these topics:

- [Section 7.1, "About Managed Content in Workflows"](#)
- [Section 7.2, "Viewing All Your Workflow Assignments"](#)
- [Section 7.3, "Approving or Rejecting Files in Workflows"](#)
- [Section 7.4, "Removing a File From Your WorkFlow Assignments"](#)

7.1 About Managed Content in Workflows

Note: Not all server environments support workflows.

Workflows on Oracle WebCenter Content Server instances specify how content is routed for review and approval before it is released and made available to other users on the server for viewing or check-out. Users on the server do not have access to a file until it successfully moves through the entire workflow. If you have been designated as a reviewer for a content item, you are notified by email when you have a file to review.

7.2 Viewing All Your Workflow Assignments

You can view all your current workflow assignments for an Oracle WebCenter Content Server instance in one convenient list in Windows Explorer. This list shows all files currently in a workflow that you are assigned to review. You can approve or reject the files directly from the list.

Note: This is available only if you are connecting to a Content Server 11g instance.

To see a list of all your current workflow assignments on a content server:

1. Open Windows Explorer, and make sure the folders pane is visible.
2. Open the **WebCenter Content Servers** node. If you do not see this node in your email application, enable it first (see "[Showing the WebCenter Content Servers Hierarchy](#)").
3. Click the server for which you want to see all your workflow assignments. If prompted, log in by entering your user name and password for that server.

4. Find and select the **My Workflow Assignments** node. This node may be nested beneath the Users node.

If the server does not have a node called My Workflow Assignments, then workflow assignments may not be enabled on the server, or the server is not a Content Server 11g instance.

The content pane lists all files on the server that you have currently been assigned to review. This list matches that in Oracle WebCenter Content Server's web interface (under My Content Server). You can work with the files in this list directly to review them (see [Section 7.3, "Approving or Rejecting Files in Workflows"](#) below).

7.3 Approving or Rejecting Files in Workflows

If you are designated as a reviewer in a workflow on an Oracle WebCenter Content Server instance, you will need to approve or reject all files in that workflow.

Workflows can be set up to require electronic signatures during the approval or submission of documents. Electronically signed documents are more secure because the server is able to tell them apart from other versions of those documents, and will not allow unauthorized versions through the workflow steps. You sign a document electronically by entering your login credentials, as explained below.

If you are using Microsoft Office applications in the WebCenter Content user interface, see [Section 10.13, "Approving or Submitting Microsoft Office Documents in Workflows"](#).

To approve or reject a managed content item in a workflow:

1. Open the **My Workflow Assignments** node on the Oracle WebCenter Content Server instance which stores the workflow items you need to review (see [Section 7.2, "Viewing All Your Workflow Assignments"](#) above). The list shows all files on the server that you have been assigned to review. (You will typically receive an email notification that you should review a content item on the server.)
2. Open the document to be reviewed in its associated application. See [Section 6.10, "Opening Content Files"](#) for further details.

If the workflow step was set up to allow editing of the content item, you can make changes, and check in new revisions.

If the workflow step does not allow file editing, you can review the file, but not make any changes. (If you do change the file, you can check it in only as a new content item.)

3. When you are done reviewing the file and making changes (if allowed and where required), close the file or exit the application.
4. When you are ready to approve or reject the file, select it in the **My Workflow Assignments** node, right-click, and choose the appropriate option:
 - **Approve:** This option is for files that do not require an electronic signature. If you choose this option, the file is approved immediately. After you have approved the file, the file moves to the next step in the workflow.
 - **Sign and Approve:** This option is for files that require an electronic signature. If you choose this option, a dialog opens where you can electronically sign and approve the file. The file then moves to the next step in the workflow.
 - **Reject:** If you choose this option, a dialog opens where you must provide a reason for rejecting the file. After you click **OK**, the file is sent back to the most

recent workflow step that permitted contribution. The users assigned to that contribution step receive an email notification, so they can edit the file and submit it for review again.

These options are also available on the **File** menu.

Note: A content item in a workflow is not available to other users on the server until it successfully moves through the entire workflow.

7.4 Removing a File From Your WorkFlow Assignments

Note: This feature applies only to the WebCenter Content user interface.

You can remove a file from your list of workflow assignments (in your My Workflow Assignments folder). Selecting this option does not change the document's workflow status. If a subsequent workflow step assigns the document to you, it will again appear in your list. If you need to reinstate an item to your list, you will need to do so through the server's web interface.

To remove a file from your workflow assignments:

1. Select the file in the My Workflow Assignments folder.
2. Right-click the file and select **Remove From Your Assignments**.

This option is also available from the **File** menu.

3. Read the confirmation dialog to make sure the intended file will be affected, then select **OK**.

You can select more than one file at a time to be removed from your workflow assignments. If you do this, a confirmation dialog will appear, one at a time, for each file.

Working with Offline Content

This section covers these topics:

- [Section 8.1, "Online and Offline Mode"](#)
- [Section 8.2, "Making Folders and Files Available Offline"](#)
- [Section 8.3, "Viewing or Opening Offline Files"](#)
- [Section 8.4, "Refreshing Offline Content"](#)
- [Section 8.5, "Removing Offline Content"](#)
- [Section 8.6, "Working with a Content Server in Offline Mode"](#)

8.1 Online and Offline Mode

Folders and files can be in online and offline mode. In **online** mode, you need a live connection to the content server to have access to the folders and files on it. You log in to the server and then you have access to all folders and files in accordance with your assigned privileges (see [Section 2.11, "Connecting to a Content Server"](#)).

In **offline** mode, folders and files are downloaded from a content server and read-only copies are created in a special cache location on your local computer (see [Section 4.6, "Local Caching of Content Files"](#)). This means that you can view these folders and files (in read-only mode), even if you are not connected to the content server; in other words, when you are working with that server in offline mode (see [Section 8.6, "Working with a Content Server in Offline Mode"](#)). This may be useful in situations where you need access to content files, but you cannot connect to the server that they reside on. For example, you may need read-only access to a report or a presentation you are giving while traveling. In this case you could obtain a copy of the current version of the report before you disconnect from the server, and then have read-only access to that file while working offline.

You make files available offline (called 'syndicate' in Desktop Integration Suite versions prior to 11gR1) using their context menu (**Make Content Available Offline** for folders and **Available Offline** for files). If you select the Make Content Available Offline option in the context menu of a folder, it is not the folder itself that is made available offline, but all files in that folder, including files in subfolders. Only content items in a folder show the offline availability icon (blue cylinder; see [Figure 8-1](#)), not the folder itself. Also, this action is performed on the snapshot of the folder at that given time. If you add any new files to the folder, these are not automatically made available offline. You will need to make the folder available offline again to include the new files in the folder.

Files that are available offline show a cylinder in their file icon, which can be either blue or gray (Figure 8–1). In addition, the **Available Offline** option in the file context menu has a check mark.

Figure 8–1 Offline Availability Icons



The cylinder is blue if the versions of your locally cached file copy and the original file on the content server match; that is, no new revision has been checked in to the content server since you selected the file for offline availability. In other words, your local file copy is up to date. The cylinder is gray if the offline and online file versions do not match. This would, for example, be the case if someone updated the original item on the content server, and your local copy is still an older revision. In other words, your local file copy is outdated. When online, you can update an offline content folder by right-clicking it and choosing **Refresh Offline Content** in the context menu. All offline files in that folder are then overwritten with the most recent revisions of those files on the content server.

8.2 Making Folders and Files Available Offline

To make files or folders available for offline use:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Click the content server that stores the file(s) or folder(s) that you want to make available offline. If prompted, log in by entering your user name and password for that server.
3. Navigate to the folder(s) or file(s) in the content folder tree that you want to make available offline.
4. Right-click and choose **Make Content Available Offline** (for folders) or **Available Offline** (for files). The **Available Offline** option is also available on the **File** menu. The selected folders or files are now available in offline server mode.

If you select the Make Content Available Offline option in the context menu of a folder, it is not the folder itself that is made available offline, but all files in that folder, including files in subfolders. Only content items in a folder show the offline availability icon (blue cylinder; see Figure 8–1), not the folder itself. Also, this action is performed on the snapshot of the folder at that given time. If you add any new files to the folder, these are not automatically made available offline. You will need to make the folder available offline again to include the new files in the folder.

For content items in a folder to be made available offline, they must actually reside in that folder. This means that content in query folders cannot be made available offline. The contents of these folders do not actually exist in the folders; they are just grouped there because their metadata matches the search criteria. The actual content items may exist under a different folder location, or they may not even appear in a 'standard' folder at all.

8.3 Viewing or Opening Offline Files

To view or open an offline file:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.

2. Click the content server that stores the offline file you want to view or open. If prompted, log in by entering your user name and password for that server.
3. Navigate to the offline file in the content folder tree that you want to view or open, and select it.

or

Open the **Offline Files** node (if available) for the server to see all offline files and select the offline file that you want to view or open.

The Offline Files node may be visible only when the server is in offline mode.

4. Right-click and choose **View** or **Open with...** to open the file in read-only or full edit mode, respectively. The **View** and **Open with...** options are also available on the **File** menu. For more information, see [Section 6.9, "Viewing Content Files"](#) and [Section 6.10, "Opening Content Files."](#)

8.4 Refreshing Offline Content

The offline copy of a file is not automatically updated. This means that if a new file revision is checked in to the content server, your local copy is out of date. This is indicated by a gray cylinder overlay on the file icon ([Figure 8-1](#)). You can refresh offline files, so they are updated to their latest released revisions on the content server.

If you refresh an offline folder, the existing offline files in that folder (and all subfolders) are updated to their latest released revisions on the content server. Any files that were added to a folder after it was made available offline will not be made available offline if you refresh that folder. For that to happen, you need to right-click the folder and choose **Make Content Available Offline** in the context menu.

To refresh offline files:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Click the content server that stores the file or folder that you want to refresh. If prompted, log in by entering your user name and password for that server.
3. Navigate to the folder or file in the content folder tree that you want to refresh. You can select multiple folders and files if you want.
4. Right-click and choose **Refresh Offline Content**. The selected files are now updated to their latest released revisions on the content server.

8.5 Removing Offline Content

To remove an offline file or folder, so they are no longer available offline:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Click the content server that stores the file or folder that you want to remove. If prompted, log in by entering your user name and password for that server.
3. Navigate to the folder or file in the content folder tree that you want to remove. You can select multiple folders and files if you want.
4. Right-click and choose **Remove Offline Content**. The selected files and folders are now removed from the local cache and they are no longer available offline. This does not affect the original files and folders on the content server; they remain available.

8.6 Working with a Content Server in Offline Mode

After you have made files and folders (or rather, the files in them) available offline, you have access to them even if you are not connected to the content server; in other words, when you are working with that server in offline mode.

Tip: Before going offline, you may want to refresh your local offline content to ensure you have the most recent file copies on your computer. For more information, see [Section 8.4, "Refreshing Offline Content."](#)

To work with a content server in offline mode:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Select the content server that you want to work offline with.
3. Right-click and choose **Work Offline**.

The **Work Offline** option in its context menu is preceded by a check mark. In addition, the server icon may show a red offline indicator ([Figure 8–2](#)).

Figure 8–2 Offline Oracle WebCenter Content Server (native 11g user interface)



After going to offline mode, you can access the following categories of files and folders on the server:

- files and folders that you have checked out (see [Section 6.11, "Checking Out Content Files"](#))
- files and folders that you have specifically made available offline (see [Section 8.2, "Making Folders and Files Available Offline"](#))

In offline mode, the content server in the integration hierarchy includes an **Offline Files** node, which lists all files on that server that are offline, including those that are not in a content folder. You can interact with these files directly from the list.

Additionally, when using the WebCenter Content user interface, any folders that you made available offline are shown beneath the Other Folders node. These folders and subfolders contain the files that you can work on offline.

When you have finished working offline and are ready to reconnect to a server, right-click the server and click **Work Offline** on the context menu. If prompted, provide your login credentials by entering your user name and password.

Part III

Microsoft Office Integration

This part describes how Oracle WebCenter Content: Desktop is integrated into Microsoft Office applications. It also describes how to use this integration.

Part III contains the following chapters:

- [Chapter 9, "Understanding Microsoft Office Integration"](#)
- [Chapter 10, "Working with Managed Documents in Microsoft Office"](#)

Understanding Microsoft Office Integration

This section covers these topics:

- [Section 9.1, "About Microsoft Office Integration"](#)
- [Section 9.2, "Integration into Microsoft Office XP \(2002\) and 2003"](#)
- [Section 9.3, "Integration into Microsoft Office 2007, 2010, and 2013"](#)
- [Section 9.4, "Close Dialog"](#)
- [Section 9.5, "Most-Recently-Used \(MRU\) List"](#)
- [Section 9.6, "Microsoft Office Document Properties"](#)

9.1 About Microsoft Office Integration

After installing the Desktop client software on your computer, you can interact with content servers and the files on them directly from a number of Microsoft Office applications. You can perform a number of content management tasks, including opening files from a content server ("check out"), saving file to a server ("check in"), searching for files on a server, comparing document revisions on a server, and inserting files on a server or links to these files into the current document.

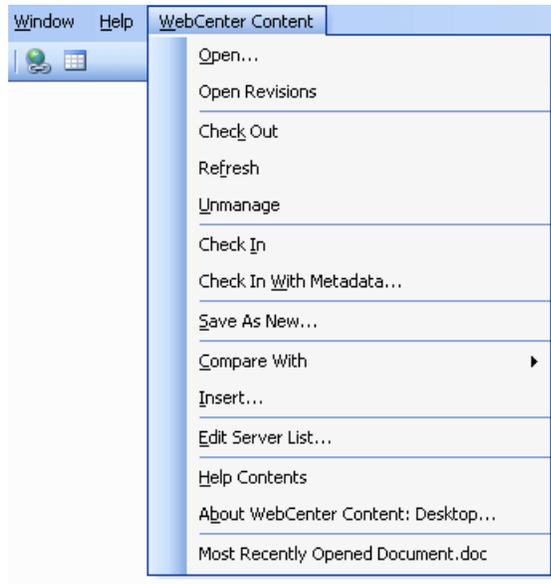
Note: Not all these features may be available in all Microsoft Office applications and for all content servers (depending on their server type and version).

The following Microsoft Office applications are supported:

- Microsoft Word 2002 (XP) through 2013
- Microsoft PowerPoint 2002 (XP) through 2013
- Microsoft Excel 2002 (XP) through 2013

9.2 Integration into Microsoft Office XP (2002) and 2003

The Desktop client software adds a menu called **WebCenter Content** to the main Microsoft Office XP (2002) and 2003 application menu bars.

Figure 9–1 WebCenter Content menu in Microsoft Word 2003

The WebCenter Content menu contains the following menu items:

- **Open...:** This option opens a dialog where you can locate a file on a content server and open it in the current Office application. The file is checked out of the content server. For more information, see [Section 10.2, "Opening and Viewing an Existing Managed Document."](#)
- **Open Revisions:** This option opens a dialog where you can choose a particular revision of the managed file to be opened in the current Office application. For more information, see [Section 10.5, "Opening a Different Revision of a Managed Document."](#)
- **Check Out:** This option checks the currently open read-only Office document out of the content server, so you can make changes and check it back in to the server as a new revision when you are done. For more information, see [Section 10.4, "Checking Out a Managed Document in View Mode."](#)
- **Refresh:** This option updates the currently open managed Office document to the latest revision on Oracle WebCenter Content Server. For more information, see [Section 10.6, "Refreshing a Managed Document."](#)
- **Unmanage:** This option removes the managed status of the current Office document and turns it into an unmanaged document, which means you can no longer check it in to the content server as a revision of the existing document. For more information, see [Section 10.10, "Turning a Managed Document into an Unmanaged Document."](#)
- **Check In:** This option checks the current Office document back in to the content server as a new revision using its existing metadata. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)
- **Check In With Metadata...:** This option opens a dialog where you can modify the metadata of the current Office document before checking it in to the content server as a new revision. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)

- **Save As New...:** This option opens a dialog where you can check the current Office document in to a content server as a new content item. For more information, see [Section 10.7, "Creating and Checking In a New Managed Document."](#)
- **Compare With:** This option is available only in Microsoft Word. It enables you to compare the current Word document with another document:
 - **Revision:** This option enables you to compare the current Word document with a different revision of the same document on the content server. If you choose this option, a dialog is opened where you can select the document revision that you want to compare the current Word document with. (This option is available only if the current Word document is a managed content item.)
 - **Content Item:** This option enables you to compare the current Word document with a different document on the content server. If you choose this option, a dialog is opened where you can locate a file on the content server to compare to the document currently open in Microsoft Word.

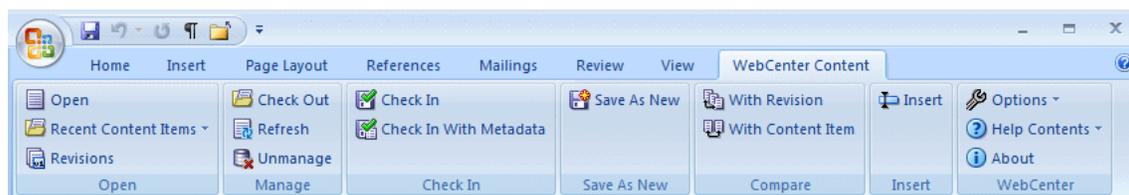
For more information on the document comparison feature, see [Section 10.12, "Comparing Managed Microsoft Word Documents."](#)

- **Insert...:** This option opens a dialog where you can select a file on a content server for insertion into the current Microsoft Word, Excel, or PowerPoint document (at the current cursor position). You can insert a hyperlink to a file on the server, the contents of a file, or an image. For more information, see [Section 10.11, "Inserting Managed Content into Microsoft Office Documents."](#)
- **Edit Server List...:** This option opens a dialog where you can add, view, and delete server connections. For more information, see [Chapter 2, "Working with Content Server Connections."](#)
- **Help Contents:** This option launches the Desktop online help in your standard web browser.
- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.
- **Most recently used (MRU) list:** This lists a number of content items on Oracle WebCenter Content Server instances that were most recently opened in the Microsoft Office application. You can conveniently reopen a document by selecting it in the list. For more information, see [Section 10.3, "Reopening a Recently Opened Managed Document."](#)

9.3 Integration into Microsoft Office 2007, 2010, and 2013

The Desktop client software adds a ribbon called **WebCenter Content** to the Microsoft Office 2007, 2010, and 2013 application interfaces.

Figure 9–2 *WebCenter ribbon in Microsoft Word 2007*



The WebCenter ribbon includes the following groups:

- **Open:** This ribbon group contains the following option:
 - **Open:** This option opens a dialog where you can locate a file on a content server and open it in the current Office application. The file is checked out of the content server. For more information, see [Section 10.2, "Opening and Viewing an Existing Managed Document."](#)
 - **Recent Content Items:** This option opens a menu that lists a number of content items on Oracle WebCenter Content Server instances that were most recently opened in the Microsoft Office application. You can conveniently reopen a document by selecting it in the list. For more information, see [Section 10.3, "Reopening a Recently Opened Managed Document."](#)
 - **Revisions:** This option opens a dialog where you can choose a particular revision of the managed file to be opened in the current Office application. For more information, see [Section 10.5, "Opening a Different Revision of a Managed Document."](#)
- **Manage:** This ribbon group contains the following options:
 - **Check Out:** This option checks the currently open read-only Office document out of the content server, so you can make changes and check it back in to the server as a new revision when you are done. For more information, see [Section 10.4, "Checking Out a Managed Document in View Mode."](#)
 - **Refresh:** This option updates the currently open managed Office document to the latest revision on Oracle WebCenter Content Server. For more information, see [Section 10.6, "Refreshing a Managed Document."](#)
 - **Unmanage:** This option removes the managed status of the current Office document and turns it into an unmanaged document, which means you can no longer check it in to the content server as a revision of the existing document. For more information, see [Section 10.10, "Turning a Managed Document into an Unmanaged Document."](#)
- **Check In:** This ribbon group contains the following options:
 - **Check In:** This option checks the current Office document back in to the content server as a new revision using its existing metadata. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)
 - **Check In With Metadata:** This option opens a dialog where you can modify the metadata of the current Office document before checking it in to the content server as a new revision. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 10.8, "Saving and Checking In an Existing Managed Document."](#)
- **Save As New:** This ribbon group contains the following option:
 - **Save As New:** This option opens a dialog where you can check the current Office document in to a content server as a new content item. For more information, see [Section 10.7, "Creating and Checking In a New Managed Document."](#)
- **Compare:** This ribbon group is available only in Microsoft Word. It contains the following options:
 - **With Revision:** This option enables you to compare the current Word document with a different revision of the same document on the content server. If you choose this option, a dialog is opened where you can select the

document revision that you want to compare the current Word document with. (This option is available only if the current Word document is a managed content item.)

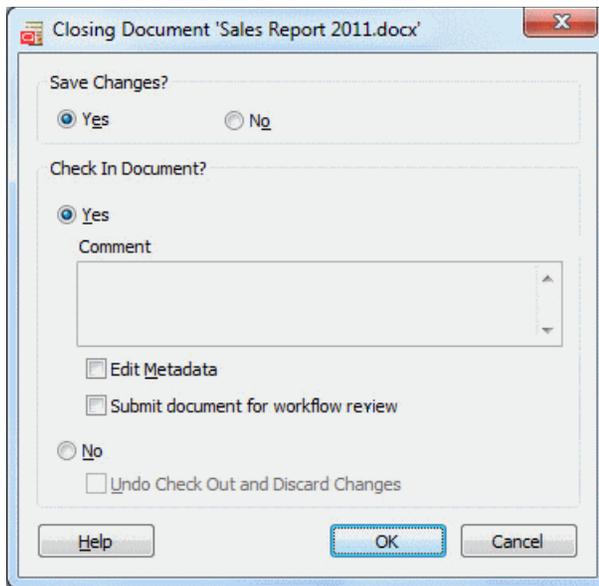
- **With Content Item:** This option enables you to compare the current Word document with a different document on the content server. If you choose this option, a dialog is opened where you can locate a file on the content server to compare to the document currently open in Microsoft Word.

For more information on the document comparison feature, see [Section 10.12, "Comparing Managed Microsoft Word Documents."](#)

- **Insert:** This ribbon group contains the following option:
 - **Insert:** This option opens a dialog where you can select one or more files on an Oracle WebCenter Content Server instance for insertion into the current Microsoft Word, Excel, or PowerPoint document (at the current cursor position). You can insert hyperlinks to files on a server, the contents of files, or images. For more information, see [Section 10.11, "Inserting Managed Content into Microsoft Office Documents."](#)
- **WebCenter:** This ribbon group contains the following options:
 - **Options:**
 - * **Edit Server List:** This option opens a dialog where you can add, view, and delete server connections. For more information, see [Chapter 2, "Working with Content Server Connections."](#)
 - **Help Contents:** This option launches the Desktop online help in your standard web browser.
 - **About:** This option opens a dialog that provides version information about the Desktop client software.

9.4 Close Dialog

By default, when you have a checked-out document open in your Microsoft Office application and you close that document or the application, a special close dialog for managed documents opens ([Figure 9–3](#)).

Figure 9–3 Integration Close Dialog in Microsoft Office Application

This special close dialog enables you to decide what to do with the current checked-out document: you can save the changes (if there are any unsaved changes), check the document back in to the server as a new revision, add a comment, edit the document metadata before checking it in, not check it in and save it locally as an offline file, or cancel the checked-out status of the document. For more information, see [Section 10.8.2, "Checking In a Managed Document When Closing It."](#)

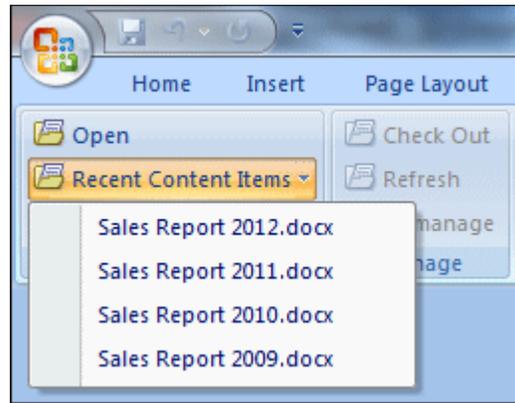
Note: Optionally, you can configure Desktop to close managed documents in much the same way as unmanaged documents ("Do you want to save the changes?"), so you will not see this special dialog. See [Section A.1, "Setting Windows Explorer Integration Options"](#) ('Hide the Close Document check-in dialog' option).

9.5 Most-Recently-Used (MRU) List

Microsoft Office applications provide a most recently used (MRU) list of content items on Oracle WebCenter Content Server instances that were opened in the application before. This enables you to quickly and conveniently reopen content items you worked on earlier.

Note: The most-recently-used list includes only content items that reside on Oracle WebCenter Content Server or Oracle Content Server instances, not on Oracle Content Database servers or other WebDAV servers.

In Office XP (2002) and 2003, the list is located at the bottom of the WebCenter Content menu. In Office 2007 and 2010, it is in the **Recent Content Items** dropdown menu in the WebCenter ribbon ([Figure 9–4](#)).

Figure 9–4 Most-Recently-Used (MRU) List in Microsoft Word 2007

The most recently opened file is at the top of the list. If you hover the mouse cursor over a list item in Office 2007, 2010, or 2013, you see the content ID of the file as well as the server it resides on. Tooltips are not provided in Office XP (2002) and 2003.

To reopen a recent content item, simply select it from the list, and it opens in the Office application. If the document was last opened in read-only mode ('view'), you are asked whether you want to open it in read-only mode again or if you want it opened in full edit mode ('open'). See [Section 4.7, "Content Management Actions on Files"](#) for a comparison between viewing and opening a file.

Changing the Maximum Number of MRU List Items

You can change the maximum number of items shown in the most recently used list:

- **Microsoft Office XP (2002) and 2003:** Click **Tools**, then **Options**, open the **General** tab, and then set the maximum number of entries in the **Recently used file list** option. Make sure the check box for this option is selected.
- **Microsoft Office 2007:** Click the Office button in the top left corner, then choose **Word/Excel/PowerPoint Options**, then **Advanced**, and then set the maximum number of entries in the **Show this number of Recent Documents** option.
- **Microsoft Office 2010 and 2013:** Open the **File** panel, then choose **Options**, then **Advanced**, and then set the maximum number of entries in the **Show this number of Recent Documents** option.

The new setting takes effect as soon as you close the options dialog, but the number of items shown on the list will not change until a new document is added to it.

9.6 Microsoft Office Document Properties

A number of custom properties may be added to Microsoft Office files, depending on the content server type and configuration (specifically, the DesktopTag feature on Oracle WebCenter Content Server). By default, these new custom properties include:

- **DISdDocName:** This is the content ID of the document on the content server. Every content item on the server has its own content ID, which uniquely identifies that item on the server. (Each checked-in document revision has an additional, internal ID as a unique reference to that specific revision; see DISdID below.)
- **DISProperties:** This is a list of all Desktop properties that are added to Microsoft Office documents.

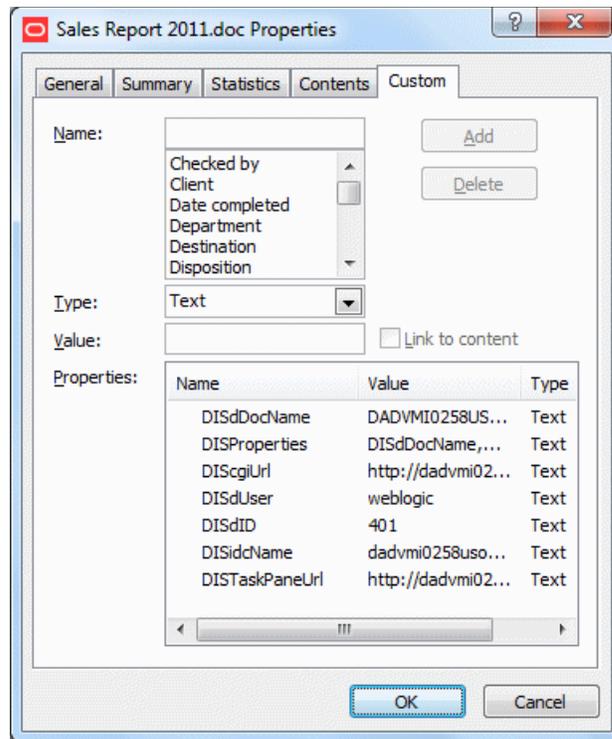
- **DIScgiUrl:** This is the CGI URL of the content server that the document resides on. It essentially enables Microsoft Office applications (or other third-party software) to "remember" what content server the Microsoft Office document came from when it was opened in the application, and where it was stored on the server.
- **DISdWorkflowState:** This is the current state of the document in a workflow (if applicable).
- **DISdUser:** This is the user name of the document author (or more specifically, the user who checked the document in to the content server).
- **DISdID:** This is the unique identifier for this specific document revision on the content server. Every revision of a content item on the server has its own internal ID, which provides a unique reference to that specific revision of the content item.
- **DISTaskPaneUrl:** This is the URL that can be used to display information about the content item in the task pane of Microsoft Office applications (or other third-party software).

Note: The custom properties are automatically handled by Desktop and should not be changed by end users.

Viewing the Custom Properties

You can view the custom properties of a Microsoft Office file as follows:

- **Microsoft Office XP (2002) and 2003:** Choose **File**, then **Properties**, and then open the **Custom** tab.
- **Microsoft Office 2007:** Click the Office button in the top left corner, then choose **Prepare**, then **Properties**, then **Document Properties**, then **Advanced Properties**, and then open the **Custom** tab.
- **Microsoft Office 2010 and 2013:** Open the **File** panel, then click **Info**, then **Properties**, then **Advanced Properties**, and then open the **Custom** tab.

Figure 9–5 Custom Document Properties (Microsoft Word 2007)

These custom document properties allow Desktop to keep track of the location of a managed Microsoft Office document on a content server as well as its revision history. This enables users to open the most recent revision of a managed document even if they have an older revision, or to check a document back in to a content server even outside a content management integration context. This may be useful in a number of situations, for example:

- You received a managed Microsoft Office document from someone else, for example as an attachment to an email.
- You received a managed Microsoft Office document that may not be the most recent revision.
- You copied a managed Microsoft Word document from a server in the integration hierarchy on your computer to a folder outside that hierarchy.

In any of these cases, you can open the latest revision of the document in Microsoft Word on your computer, make changes, and then check it back in to the server using the WebCenter Content menu or ribbon in Microsoft Word. Desktop looks at the custom properties embedded in the Microsoft Word document to find out where to upload the file to.

Working with Managed Documents in Microsoft Office

This section covers these topics:

- [Section 10.1, "About Microsoft Office Integration"](#)
- [Section 10.2, "Opening and Viewing an Existing Managed Document"](#)
- [Section 10.3, "Reopening a Recently Opened Managed Document"](#)
- [Section 10.4, "Checking Out a Managed Document in View Mode"](#)
- [Section 10.5, "Opening a Different Revision of a Managed Document"](#)
- [Section 10.6, "Refreshing a Managed Document"](#)
- [Section 10.7, "Creating and Checking In a New Managed Document"](#)
- [Section 10.8, "Saving and Checking In an Existing Managed Document"](#)
- [Section 10.9, "Turning an Unmanaged Document into a Managed Document"](#)
- [Section 10.10, "Turning a Managed Document into an Unmanaged Document"](#)
- [Section 10.11, "Inserting Managed Content into Microsoft Office Documents"](#)
- [Section 10.12, "Comparing Managed Microsoft Word Documents"](#)
- [Section 10.13, "Approving or Submitting Microsoft Office Documents in Workflows"](#)

10.1 About Microsoft Office Integration

The Desktop client software enables you to interact with content servers and the files on them directly from Microsoft Word, Excel, and PowerPoint. You can perform a number of content management tasks, including opening Microsoft Office documents from a content server ("check out"), saving documents to a server ("check in"), searching for documents on a server, comparing document revisions on a server, and inserting files on a server or links to these files into the current document.

See [Chapter 9, "Understanding Microsoft Office Integration"](#) for details on how the Desktop client software integrates with the Microsoft Office application interfaces.

See [Chapter 4, "Understanding Enterprise Libraries, Folders, and Files"](#) for general information about content folders and files.

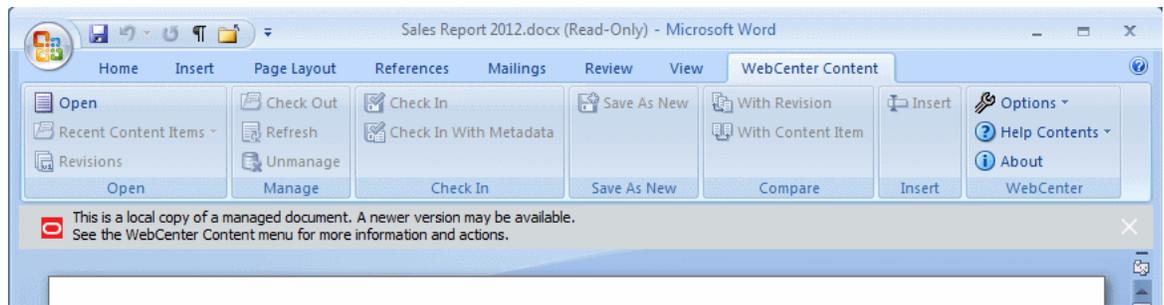
10.2 Opening and Viewing an Existing Managed Document

When you **open** an existing managed document on a content server in a Microsoft Office application, it is checked out of the server and the document opens in full edit mode. You can make changes to the document as required and when you save the document, you can check it back in to the server as a new revision of the existing content item. While the document is checked out, it is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out").

When you **view** an existing managed document on a content server in a Microsoft Office application, it is *not* checked out of the server and the document opens in read-only mode. You can make changes to the document, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item. If a document opens in view mode, you will see "(Read-Only)" following the file name in the application title bar (Figure 10-1).

Managed documents open in Microsoft Word, Excel, or PowerPoint with an information bar that provides content management details about the document (Figure 10-1). You can close this information bar by clicking the 'X' on the right.

Figure 10-1 Read-Only Indicator and Information Bar in Microsoft Word 2007



You can open or view a managed Microsoft Office document in different ways:

- [Within the Microsoft Office Application](#)
- [From Windows Explorer](#)

Within the Microsoft Office Application

You do not use the Microsoft Office application's standard file-open features to open or view a managed document. Instead, you go through the special WebCenter Content menu or ribbon:

1. Start Microsoft Word, PowerPoint, or Excel.
2. Open the **WebCenter Content** menu or ribbon, and then choose **Open**.
The Select Content dialog opens.
3. Select the **Edit** or **View** option in the bottom right corner of the dialog, depending on which edit mode you want for the document.
4. Browse to, or search for, the Microsoft Office document on the server that you want to open, and select it. Make sure that you select a file that is compatible with the current Microsoft Office application (for example, a word-processing document for Microsoft Word).
5. Click **OK**.

If the document is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.

From Windows Explorer

You can also open or view a managed Microsoft Office document from Windows Explorer:

1. Browse to, or search for, the Microsoft Office document on the content server that you want to open or view, and select it. Make sure that you select a file that is compatible with the Microsoft Office application (for example, a word-processing document for Microsoft Word).
2. Right-click and choose **Open**, **View**, or **View File From Server** in the context menu:
 - **Open:** This checks out the selected file from the content server and opens the document in its associated Office application in full edit mode. If the document is already in your local cache (typically because you edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.
 - **View:** This opens the selected document from your local cache in its associated Office application in read-only mode, but it does not check out the file from the server. This option is available only if the document is already in your local cache.
 - **View File From Server:** This opens the latest released revision of the selected document on the content server in read-only mode (as opposed to the locally cached version).

The **Open**, **View**, and **View File From Server** options are also available on the **File** menu.

In addition to using the context menu or the **File** menu, you can also press Enter or double-click the selected item. By default, this will open the managed document in read-only mode ('view'), but you can change that to full edit mode ('open') (see [Section A.1, "Setting Windows Explorer Integration Options"](#)).

3. The managed document opens in its associated Microsoft Office application in the selected edit mode.

10.3 Reopening a Recently Opened Managed Document

Note: Managed documents do not appear in the Documents list on the Windows Start menu.

Desktop keeps a most recently used (MRU) list in Microsoft Office applications, so you can quickly and conveniently open managed documents on Oracle WebCenter Content Server that you worked on before. The most recently opened file is at the top of the list. If you hover the mouse cursor over a list item in Office 2007, 2010, or 2013, you see the content ID of the file as well as the server it resides on. Tooltips are not provided in Office XP (2002) and 2003. You can configure the maximum number of items shown in the list. See [Section 9.5, "Most-Recently-Used \(MRU\) List"](#) for further details.

To reopen a managed Microsoft Office document you worked on earlier, open the most recently used list and select the file you want to open. In Office XP (2002) and 2003, the list is located at the bottom of the WebCenter Content menu. In Office 2007, 2010, and 2013, it is in the **Recent Content Items** dropdown menu in the WebCenter ribbon. If the document was last opened in read-only mode ('view'), you are asked whether you want to open it in read-only mode again or if you want it opened in full edit mode ('open'). See [Section 4.7, "Content Management Actions on Files"](#) for a comparison between viewing and opening a file.

10.4 Checking Out a Managed Document in View Mode

A managed document that you open in a Microsoft Office application may not be checked out of the content server. This is the case in the following situations:

- You open a managed Microsoft Office document from a content folder in view mode. See [Section 10.2, "Opening and Viewing an Existing Managed Document."](#) This downloads a copy of the managed document from the server to your local cache, but does not check it out.
- You open a managed Microsoft Office document from your local file system (for example, saved as an email attachment). Desktop detects it is a managed document, but does not check it out.

You can make changes to the document, but you cannot check it back in to the server as a new revision of the existing content item without checking it out first. If you do not check out the document, you can always check it in as a new content item using the **Save As New** option.

To check out a managed document from within a Microsoft Office application, use the **Check Out** option in the WebCenter Content menu or ribbon. What happens depends on the state of the managed document that is currently open in the Microsoft Office application:

- The managed document currently open in the Microsoft Office application is the latest revision on the server and it is not already checked out. When you choose **Check Out**, the document is checked out of the server and its read-only status in the Microsoft Office application revoked. You can now edit the document as required and check it back in to the server as a new revision of the existing content item.
- The managed document currently open in the Microsoft Office application is not the latest revision on the server. This situation could, for example, arise if you were emailed a managed Word document and someone has checked a new revision of that document in to the content server by the time you are ready to check in your document.

You are then presented with two options: (1) download, check out, and edit the latest revision from the content server, or (2) continue to edit the current, outdated copy on your local computer. You can edit the document as required and check it back in to the server as a new revision of the existing content item.

- The current document is not the latest revision and there is already a modified version of the document in your local cache. This situation could, for example, arise if you checked out a document and made changes, saved and closed the document without checking it in, and then viewed any revision of the document from the server.

You are then presented with two options: (1) close the current document and edit the previously modified copy in your local cache instead, or (2) edit the current copy and discard all previous modifications (as stored in the locally cached copy).

After you check out a read-only document, you will see that the "(Read-Only)" indicator in the application title bar disappears. In addition, the information bar changes to reflect the new document state.

You cannot check out a read-only document if it is in a file format that does not support embedded Microsoft Office properties (such as RTF, XML, or plain text). See [Section 9.6, "Microsoft Office Document Properties"](#) for more information on embedding custom Microsoft Office properties. If you cannot check out the current read-only document, the Check Out option is not available.

10.5 Opening a Different Revision of a Managed Document

When you open a managed Microsoft Office document from an Oracle WebCenter Content Server instance that has multiple revisions, you can choose to open a different document revision instead of the current one. This may be useful if you opened a document that may have newer revisions on the server; for example, because it was emailed to you as an attachment some time ago and newer revisions may have been checked in after that. There may also be situations where you may want to open an older document revision than the one you opened in the Microsoft Office application.

Tip: You can avoid the situation of obsolete document attachments by emailing links to content items rather than the files themselves. This works only if the file recipient has access to the content server that stores the attached file. See [Section 10.11.2, "Inserting Links."](#)

To check the revision history of the currently open managed document and potentially open a different revision:

1. Open the managed document in the Microsoft Office application.
2. Open the **WebCenter Content** menu or ribbon, and then choose **Revisions** (Microsoft Office 2007, 2010, and 2013) or **Open Revisions** (Microsoft Office XP and 2003).

The Select Revision dialog opens.

3. Select the document revision you want to open and click **OK**.

The currently open document is replaced with the selected document revision in read-only mode. If you want to edit the document and save it as a new revision of the existing content item on the server, you must check it out first by selecting the **Check Out** option in the WebCenter Content menu or ribbon. Otherwise you can only check it in as a new content item.

10.6 Refreshing a Managed Document

When you open a managed Microsoft Office document that resides on an Oracle WebCenter Content Server instance, you can refresh it to show the latest revision from the content server. This may be useful if you opened a document that may have newer revisions on the server; for example, because it was emailed to you as an attachment some time ago and newer revisions may have been checked in after that.

Tip: You can avoid the situation of obsolete document attachments by emailing links to content items rather than the files themselves. This works only if the file recipient has access to the content server that stores the attached file. See [Section 10.11.2, "Inserting Links."](#)

To refresh the current managed document, open the WebCenter Content menu or ribbon and then choose **Refresh**. The latest revision of the current managed document is then downloaded from the server and opens in the Microsoft Office application (replacing the old revision). You can then edit the document as required and check it back in to the content server as a new revision of the existing content item (see [Section 10.8, "Saving and Checking In an Existing Managed Document"](#)).

10.7 Creating and Checking In a New Managed Document

If you create a new document or open an unmanaged document in a Microsoft Office application, you can check it in to a content server. This uploads and submits the file to the server and makes it available to other users on the server in accordance with their assigned access privileges.

To check in a Microsoft Office document that is not yet managed on a content server:

1. Open an existing, unmanaged Microsoft Office document in the Microsoft Office application (using the application's built-in file-open features), or create a new document.
2. When you are ready to check the document in to a content server as a new content item, open the WebCenter Content menu or ribbon, and choose **Save As New**.

The Save dialog opens.

3. You can check in the document in either of two ways:
 - by using a check-in form (Oracle WebCenter Content Server instances only), or
 - by selecting a folder on a server where the document should be saved.

The file name that you specify will also be the content item title (minus the file extension).

By default, a file is closed in the Microsoft Office application after it is checked in to a content server. Select the **Reopen after check-in** check box if you want the document to be reopened automatically after it is checked in. (The file is also checked out of the content server again.) This is useful if you want to continue to work on the document after check-in.

After you check a document in to a content server, it is available to other users on the server, depending on the content item's assigned security restrictions and users' access privileges.

10.8 Saving and Checking In an Existing Managed Document

After you have opened a managed document in a Microsoft Office application (see [Section 10.2, "Opening and Viewing an Existing Managed Document"](#)), you can modify it and check it back in to the server. If you opened the document in full edit mode ('open'), you can check it in as a new revision of the existing content item on the server. If you opened it in read-only mode ('view'), you can make changes, but you must check it in as a new content item. You can check in managed Microsoft Office documents from within their applications at different editing points:

- [Section 10.8.1, "Checking In a Managed Document While Editing It"](#)
- [Section 10.8.2, "Checking In a Managed Document When Closing It"](#)

Note: This section covers checking in managed documents from within Microsoft Office applications. Of course, you can also check them in from Windows Explorer. See [Section 6.12, "Checking In Content Files"](#) for further details.

10.8.1 Checking In a Managed Document While Editing It

Every time you save the current managed document (for example, by pressing **Ctrl+S**), it is updated in the Desktop cache on your computer (see [Section 4.6, "Local Caching of Content Files"](#)), but not checked in to the content server. To check in the document while you are editing it, choose **Check In** in the WebCenter Content menu or ribbon. This automatically uploads the document to the content server and creates a new revision of the content item (for Oracle WebCenter Content Server instances) or overwrites the existing file (for Oracle Content Database servers and other WebDAV servers). New revisions inherit all metadata from the previous revision. If you have any unsaved changes in your document, these are saved before the check-in.

Note: The **Check In** option is not available for read-only managed documents, since you must check these in as new content items (**Save As New**). You may be able to check out read-only documents from within the application, so you can check them back in to the server as new revisions. See [Section 10.4, "Checking Out a Managed Document in View Mode"](#).

Before the document is checked in to an Oracle WebCenter Content Server instance, you may be given the opportunity to provide a comment in the Check-in Comment dialog (providing this has been enabled on the server). Enter the comment and click **OK** to check in the document. You can click **Recent Comments...** to see a list of comments submitted for recent check-ins which you can reuse or modify. The list includes all recent comments for all Microsoft Office applications and all documents on your computer. If the managed document already had an existing comment, this is shown as the default. If you want, you can select the check box to reopen (and check out) the document after it is checked in, so you can continue to work on it and check it in again later (as another new revision).

If you want to modify the content item metadata before checking the managed document in to the server, choose **Check In With Metadata** in the WebCenter Content menu or ribbon to open a check-in dialog. After the check-in, the document is closed automatically.

Note: You can check files in to a server only if you checked out that file yourself, or if you have administrator privileges for that server.

10.8.2 Checking In a Managed Document When Closing It

In addition to checking in a managed Microsoft Office document while editing it, you can also check it in when closing the document or exiting the Microsoft Office application. What happens depends on the Desktop configuration on your computer. By default, you see a special close dialog for managed documents (see [Section 9.4,](#)

"Close Dialog"), but you can also configure your computer to suppress this close dialog and basically close managed documents in the same way as unmanaged Microsoft Office documents ("Do you want to save the changes?"). See [Section A.1, "Setting Windows Explorer Integration Options"](#) for instructions.

Special Document Close Dialog

By default, a special close dialog is shown that provides a number of save options for the current document. The table below lists all possible save scenarios for these dialogs, with an explanation of what happens for each of them.

The Save Changes option is provided only if your document currently has any unsaved changes.

If the document is currently in a workflow on Oracle WebCenter Content Server (in environments where workflows are supported), then the dialog includes options for progressing the document. See [Section 7.3, "Approving or Rejecting Files in Workflows"](#)

Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 1	Yes	Yes	No	n/a	Any unsaved changes to the document are saved, and the document is automatically checked in to the content server as a new revision of the existing content item, inheriting all metadata from the previous revision. After the document has been checked in to the content server, it is closed in the Microsoft Office application.
Scenario 2	Yes	Yes	Yes	n/a	Any unsaved changes to the document are saved, and you are given the opportunity to modify the file's metadata before check-in. When you are done, the file is checked in to the content server as a new revision of the existing content item. After the document has been checked in to the content server, it is closed in the Microsoft Office application.

Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 3	Yes	No	n/a	n/a	<p>Any unsaved changes to the document are saved, but the document is not automatically checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 10.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 6.12, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p> <p>You should use the application's built-in save-as feature if you want to save the file in a different location than the local cache (that is, as an unmanaged file on your own computer).</p>
Scenario 4	No	No	n/a	No	<p>The changes to the document are discarded and the document is not checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 10.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 6.12, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p>
Scenario 5	No	No	n/a	Yes	<p>Any changes to the document are discarded and the document is closed. The checked-out status of the content item is cancelled on the server, which means that other users on the server can check out the file.</p>

Simple Document Close Message

Depending on your Desktop configuration, you may not see the special close dialog for managed documents. If there are **no unsaved changes** in the document, the document closes without any user interaction. If there are any **unsaved changes** in the document, you are prompted to specify whether these should be saved before closing the document. If you choose 'No', you will lose the changes. It is important to note that the document is *not* automatically checked back in to the content server and it remains

checked out. Other users on the content server cannot check out the document until you check it back in or undo the check-out. The saved file is stored in a special cache on your local computer (see [Section 4.6, "Local Caching of Content Files"](#)). You can reopen the document and check it in using the **Check In** option (see [Section 10.8.1, "Checking In a Managed Document While Editing It"](#)), or you can check it in from Windows Explorer (see [Section 6.12, "Checking In Content Files"](#)).

If **no changes** were made to the document at all since you opened it, you are prompted to specify whether the checked-out status of the document should be canceled ("undo check-out") before the document is closed. This releases the document on the content server, so that other users may check it out.

10.9 Turning an Unmanaged Document into a Managed Document

If you have an existing, unmanaged Microsoft Office document on your local computer, you can check it in to a content server and make it available to the users on that server according to their assigned access privileges. You can either do this from the associated Microsoft Office application or from Windows Explorer.

Within the Microsoft Office Application

To check in an existing, unmanaged Microsoft Office document:

1. Open an existing, unmanaged Microsoft Office document in the Microsoft Office application using the application's built-in file-open features.
2. When you are ready to check the document in to a content server as a new content item, open the WebCenter Content menu or ribbon, and choose **Save As New**.

The Save dialog opens.

3. You can check in the document in either of two ways:
 - by using a check-in form (Oracle WebCenter Content Server instances only), or
 - by selecting a folder on a server where the document should be saved.

The file name that you specify will also be the content item title (minus the file extension).

By default, a file is closed in the Microsoft Office application after it is checked in to a content server. Select the **Reopen after check-in** check box if you want the document to be reopened automatically after it is checked in. (The file is also checked out of the content server again.) This is useful if you want to continue to work on the document after check-in.

From Windows Explorer

You can also turn an unmanaged Microsoft Office document into a managed document from Windows Explorer, simply by dragging-and-dropping or copying-and-pasting the file into a content folder on a server. See [Section 6.7, "Creating New Content Files"](#) for further details.

10.10 Turning a Managed Document into an Unmanaged Document

After you have opened a managed Microsoft Office document, you can 'unmanage' that document; that is, remove the document properties that associate it with a particular content server (see [Section 9.6, "Microsoft Office Document Properties"](#)). This effectively turns the document into a brand-new, unsaved document that you cannot check back in to the server as a new revision of the original document. You can,

of course, check it in to the server as a new content item (using the Save As New option), or you can save it as a local file. The original content item remains available on the content server.

To turn the current managed document into a new, unmanaged document, open the WebCenter Content menu or ribbon and then choose **Unmanage** and click **OK** in the dialog reminding you of the consequences of this action.

10.11 Inserting Managed Content into Microsoft Office Documents

This section covers these topics:

- [Section 10.11.1, "About Inserting Managed Content into Microsoft Office Files"](#)
- [Section 10.11.2, "Inserting Links"](#)
- [Section 10.11.3, "Inserting Files"](#)
- [Section 10.11.4, "Inserting Images"](#)

10.11.1 About Inserting Managed Content into Microsoft Office Files

Desktop ties in to the built-in object insertion features of Microsoft Office applications by enabling you to insert items from Oracle WebCenter Content Server instances into Word, Excel, and PowerPoint documents. You can insert links to files on a server, the actual contents of files from a server, or images from a server. The items are always inserted at the current cursor position in the Microsoft Office document. The Microsoft Office document into which you insert managed content or links to managed content do not have to be managed documents themselves.

Note: You can insert multiple items into a document at a time, but only if the Oracle WebCenter Content Server instance is running the Desktop 11gR1 component at least at the 11.1.1.6 level. If this is not the case, you can only insert one item at a time.

The following sections provide more information about inserting managed content:

- [Section 10.11.1.1, "Understanding Inserted Links"](#)
- [Section 10.11.1.2, "Understanding Inserted Files"](#)
- [Section 10.11.1.3, "Understanding Inserted Images"](#)

10.11.1.1 Understanding Inserted Links

You can insert hyperlinks to one or more files on a content server (Oracle WebCenter Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop uses Microsoft Office's built-in hyperlink insertion features; the only difference is that you can point to one or more files on a content server rather than local files.

When inserting links into a Microsoft Office document, you can specify three link properties:

- [Link Rendition](#)
- [Link Text](#)
- [Link to Latest Revision](#)

Link Rendition

When inserting a hyperlink, you can point to different items related to content items:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
- **HTML Rendition:** This links to an HTML version of the original file, as converted on the content server when the file is requested for viewing.
- **Content Information page:** This links to the page on the content server that provides metadata information about the content item (title, author, and so on). This page also includes links to the various available renditions of the content item.
- **Other renditions:** There may be additional, custom renditions available on an Oracle WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

Link Text

When inserting a hyperlink, you can provide a link text, which is the hyperlinked text that is inserted into the Microsoft Office document. The default is the title of the selected content item (as stored on the content server), but you can modify this as needed. If you provide no text at all, the link text will be the full URL to the selected link target.

Link to Latest Revision

When inserting a hyperlink, you can specify that the link should always point to the latest released revision of the file on the content server. This means that the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.

10.11.1.2 Understanding Inserted Files

You can insert the contents of one or more files on a content server (Oracle WebCenter Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop uses Microsoft Office's built-in file insertion features; the only difference is that you can insert the contents of one or more files on a content server rather than local files.

File contents are inserted statically; that is, there is no dynamic link between the file contents in the Microsoft Office document and the source file on the content server. This means that the document is not updated automatically if the source file is updated on the content server, or vice versa.

Whether a file can be inserted into the Microsoft Office document and how this happens depends on the file format, the current Microsoft Office application, and the general Microsoft Office configuration (for example, the installed conversion filters). For example, the contents of Word documents are inserted directly into other Word documents, but they are inserted as embedded Word objects in Excel spreadsheets.

Files from a content server are inserted in exactly the same way as local files on your computer.

Note: You cannot insert a sealed document (as managed by Oracle Information Rights Management) into an unsealed document.

File Rendition

When inserting the contents of a file from a content server, you can specify the file rendition that should be inserted:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
- **Other renditions:** There may be additional, custom renditions available on an Oracle WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

10.11.1.3 Understanding Inserted Images

You can insert one or more image files on a content server (Oracle WebCenter Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop uses Microsoft Office's built-in file insertion features; the only difference is that you can insert one or more images from a content server rather than local files.

Inserted images are not linked to their content items on the server. This means that an inserted image in a document is not updated automatically if its source image is updated on the content server, or vice versa.

Whether an image can be inserted into the Microsoft Office document and how this happens depends on the image file format, the current Microsoft Office application, and the general Microsoft Office configuration (for example, the installed conversion filters). Images from a content server are inserted in exactly the same way as local files on your computer. If you select a non-graphic file (for example, a Word document), the Microsoft Office application will attempt to convert it to a graphic. If this fails, an error is reported and nothing is inserted.

When inserting an image from a content server into a Microsoft Office document, you can specify two properties:

- [Image Rendition](#)
- [Alternative Text](#)

Image Rendition

When inserting an image, you can specify the file rendition that should be inserted:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application. If you select this rendition, make sure that it is a graphic file (for example, BMP, TIFF, GIF, or JPG).

- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a low-resolution JPG version or reduced GIF thumbnail).
- **Other renditions:** There may be additional, custom renditions available on an Oracle WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

Alternative Text

When inserting an image, you can specify the alternative text for the image, which is the text that appears when you hover the mouse cursor over the image in a web environment (that is, the text for the ALT attribute of the IMG tag). The default is the title of the selected content item (as stored on the content server), but you can modify this as needed.

10.11.2 Inserting Links

To insert hyperlinks to one or more files on an Oracle WebCenter Content Server instance into the current Microsoft Office document:

1. Move the cursor to the position in the Microsoft Office document where you want to insert one or more hyperlinks.
2. **Microsoft Office XP (2002) or 2003:** On the **WebCenter Content** menu, choose **Insert...**

Microsoft Office 2007, 2010, or 2013: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens.

3. Open the **Link** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to link to. The list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to link to, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected file, provide the **link text** for the hyperlink that will be inserted in the Microsoft Office document. The default is the title of the selected content item (as stored on the content server), but you can modify this as needed. If you provide no text at all, the link text will be the full URL to the selected link target.
6. For each selected file, select the **file rendition** that the hyperlink should point to:

- Native Rendition
- Web-Viewable Rendition
- HTML Rendition
- Content Information page

For more information, see [Section 10.11.1.1, "Understanding Inserted Links."](#)

7. For each selected file, specify whether the hyperlink should always point to the **latest revision**. If you select the check box, the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.
8. Click **OK** to insert the hyperlink or hyperlinks into the Microsoft Office document.

10.11.3 Inserting Files

To insert the contents of one or more files on an Oracle WebCenter Content Server instance into the current Microsoft Office document:

1. Move the cursor to the position in the Microsoft Office document where you want to insert the file.
2. **Microsoft Office XP (2002) or 2003:** On the **WebCenter Content** menu, choose **Insert...**

Microsoft Office 2007, 2010, or 2013: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens.

3. Open the **File** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server whose contents you want to insert. The list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files whose contents you want to insert, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected file, select the **file rendition** whose contents you want to insert:
 - Native Rendition
 - Web-Viewable Rendition

For more information, see [Section 10.11.1.2, "Understanding Inserted Files."](#)

6. Click **OK** to insert the contents of the selected file or files into the Microsoft Office document.

10.11.4 Inserting Images

To insert one or more images on an Oracle WebCenter Content Server instance into the current Microsoft Office document:

1. Move the cursor to the position in the Microsoft Office document where you want to insert the image.
2. **Microsoft Office XP (2002) or 2003:** On the **WebCenter Content** menu, choose **Insert...**

Microsoft Office 2007, 2010, or 2013: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens.

3. Open the **Image** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the image or images on the content server that you want to insert. The list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the image or images you want to insert, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected image, specify the alternative text, which is the text that appears when you hover the mouse cursor over the image in a web environment (that is, the text for the ALT attribute of the IMG tag). The default is the title of the selected content item (as stored on the content server).
6. For each selected image, select the **file rendition** that you want to insert:
 - Native Rendition
 - Web-Viewable Rendition

For more information, see [Section 10.11.1.3, "Understanding Inserted Images."](#)

7. Click **OK** to insert the selected image file or files into the Microsoft Office document.

10.12 Comparing Managed Microsoft Word Documents

This section covers these topics:

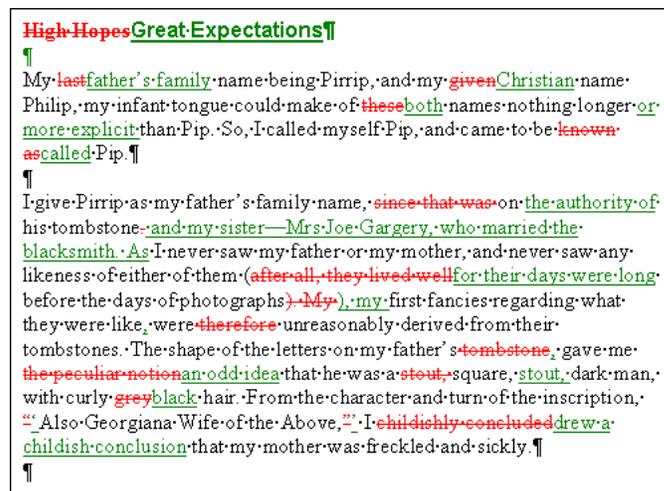
- [Section 10.12.1, "About Comparing Managed Word Documents"](#)
- [Section 10.12.2, "Comparing a Word Document with a Different Revision"](#)
- [Section 10.12.3, "Comparing a Word Document with Another Document"](#)

10.12.1 About Comparing Managed Word Documents

Desktop ties in to Microsoft Word's built-in document comparison features by enabling you to compare the current document in Word with a file on a content server. You can compare the current document with a different revision of that same document (providing the current document is managed on a content server) or with an altogether different content item on the server.

When you compare the documents, Microsoft Word shows the differences between them in a new document with marks that show where deletions, insertions, or other editing changes have been made in the original document. Exactly how the changes are represented depends on the version and configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification (Figure 10–2).

Figure 10–2 Marked Differences in Word Document



If you hover your mouse cursor over a marked change in the document, a screen tip is displayed providing content management information about that file, as shown in Figure 10–3. The following information is provided: the content ID, file size, and, if the file is currently checked out, the user name of the person who checked it out.

Figure 10–3 screen Tip Showing Information About File Change



10.12.2 Comparing a Word Document with a Different Revision

If the current managed Word document resides on an Oracle WebCenter Content Server instance and it is not a read-only copy (see Section 4.7, "Content Management Actions on Files"), you can compare it with a different revision of the same document. To do so, perform these steps:

1. Open the managed document in Microsoft Word (see Section 10.2, "Opening and Viewing an Existing Managed Document").

2. **Microsoft Word 2002 (XP) or 2003:** On the **WebCenter Content** menu, choose **Compare With** and then **Revision...**

Microsoft Word 2007, 2010, or 2013: On the **WebCenter Content** ribbon, choose **With Revision** in the **Compare** group.

Note: If the option to choose a different revision is not available, then the current document is either not managed by a content server or it is currently in read-only mode.

The Select Revision dialog opens, which shows all revisions of the current document on the server.

3. The top of the dialog shows which revision is currently open in Microsoft Word, along with some information about the content item (title, server, content ID, author, and the like). At the bottom is a list of all existing revisions of the content item, along with their title, author, release date, and comments. If you would like to see more information about any particular revision, select that revision in the list and choose **Content Information...** to open that revision's content information page on the server.
4. Select the revision that you want to compare the current document with in the list of revisions, and click **OK**.

Microsoft Word's built-in comparison features are now used to compare the current document with the revision that you selected, and the changes are shown in a new document. How the changes are represented exactly depends on the version and configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification.

10.12.3 Comparing a Word Document with Another Document

You can compare the current Word document (managed or unmanaged) with a different document on the content server. To do so, perform these steps:

1. Open the document in Microsoft Word (see [Section 10.2, "Opening and Viewing an Existing Managed Document"](#)).
2. **Microsoft Word 2002 (XP) or 2003:** On the **WebCenter Content** menu, choose **Compare With** and then **Content Item...**

Microsoft Word 2007, 2010, or 2013: On the **WebCenter Content** ribbon, choose **With Content Item** in the **Compare** group.

Note: If you want to compare the current managed Word document with a document on your local computer (not stored on a content server), simply use Word's built-in compare feature to select the file.

The Select Content dialog opens, where you can search for, or browse to, a Word document on a content server.

3. Select a Word document on a content server and close the Select Content dialog.

Microsoft Word's built-in comparison features are now used to compare the current document with the file that you selected, and the changes are shown in a new document. How the changes are represented exactly depends on the

configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification.

10.13 Approving or Submitting Microsoft Office Documents in Workflows

The Microsoft Office integration in the WebCenter Content user interface provides additional check boxes for workflow approval or submission on the dialog you see when you close a document or the application.

Note: These features apply only to the WebCenter Content user interface.

Check In and Approve the Document

If the workflow step was set up to allow editing of the document, you can make changes and then approve it while checking it in as a new revision.

To check in and approve a document in a workflow when using Microsoft Office:

1. Open the document in its Microsoft Office application. See [Section 6.10, "Opening Content Files"](#) for further details.
2. Review and edit the document as required.
3. Choose either the **Check In** or **Check In With Metadata** option from the WebCenter Content ribbon or menu.
4. If available, select the **Check in and approve** check box on the Check-in Content dialog.

This check box will not be available if the document requires an electronic signature for workflow processing. In this case, locate the document in Windows Explorer and use its context menu to sign and approve the document. See [Section 7.3, "Approving or Rejecting Files in Workflows."](#)

5. Complete the other areas of the Check-in Content dialog as required, then click **OK**.

If you exit the application or close the document without first checking it in, you can use the Close Document dialog to check in and approve it. To do this, select the **Check in and approve** check box on the Close Document dialog when it appears.

Submit the Document for Review

If the workflow step does not allow editing, you can review the Microsoft Office document without making any changes, then submit it for review.

To submit a document in a workflow when using Microsoft Office:

1. Open the document in its Microsoft Office application. See [Section 6.10, "Opening Content Files"](#) for further details.
2. Review the document as required.
3. Choose either the **Check In** or **Check In With Metadata** option from the WebCenter Content ribbon or menu.
4. If available, select the **Submit document for workflow review** check box on the Check-in Content dialog.

This check box will not be available if the document requires an electronic signature for workflow processing. In this case, locate the document in Windows

Explorer and use its context menu to sign and approve the document. See [Section 7.3, "Approving or Rejecting Files in Workflows."](#)

5. Complete the other areas of the Check-in Content dialog as required, then click **OK**.

If you exit the application or close the document without first checking it in, you can use the Close Document dialog to submit it for review. To do this, check the **Submit document for workflow review** check box on the Close Document dialog when it appears.

Part IV

Email Client Integration

This part describes how Oracle WebCenter Content: Desktop is integrated into email clients. It also describes how to use this integration.

Part IV contains the following chapters:

- [Chapter 11, "Understanding Email Client Integration"](#)
- [Chapter 12, "Working with Managed Email"](#)

Understanding Email Client Integration

This section covers these topics:

- [Section 11.1, "About Email Client Integration"](#)
- [Section 11.2, "Integration into Microsoft Outlook"](#)
- [Section 11.3, "Integration into Lotus Notes"](#)

11.1 About Email Client Integration

After installing the Desktop client software on your computer, you can check in email messages and their attachments to a content server directly from Microsoft Outlook or Lotus Notes and share them with others in your organization. In Microsoft Outlook, you can drag and drop emails directly into content folders on a server, or you can use a special content check-in form (Oracle WebCenter Content Server only).

Checked-in email messages are not intended to be checked out, modified, and checked back in. Email messages are checked in to a content server for the express purpose of preserving them exactly as they were received. You can open a checked-in email message from a server to view it in your default email application. You can even make changes if you want, but you cannot check it back in to the server. You can, however, send the message to other people or save a copy on your local computer.

For more information on managing email on content servers, see [Chapter 12, "Working with Managed Email."](#)

11.2 Integration into Microsoft Outlook

The Desktop client software can work with Microsoft Outlook 2002 (XP) through 2013. After installing the integration software, you can interact with content servers and the files on them directly from Microsoft Outlook.

Desktop adds various integration features to Microsoft Outlook:

- [WebCenter Content Servers Hierarchy in Mail Folders](#)
- [Menus, Toolbars, and Ribbons](#)
- [Content Pane and Preview Pane](#)

11.2.1 WebCenter Content Servers Hierarchy in Mail Folders

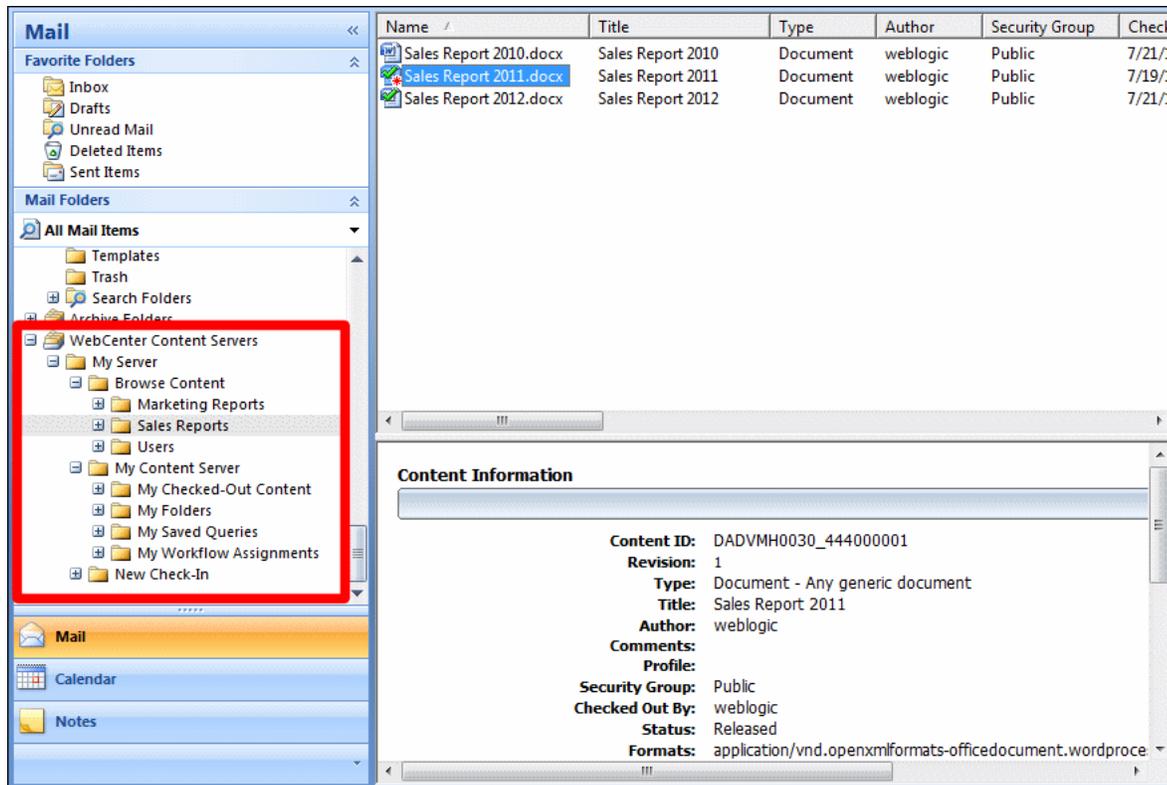
The Desktop client software adds a hierarchical folder structure called **WebCenter Content Servers** to the list of mail items in the mail folders pane in Microsoft Outlook ([Figure 11-1](#)).

For more information on the integration hierarchy, see [Chapter 3, "Understanding the Integration Hierarchy."](#)

The WebCenter Content Servers hierarchy is not displayed in the mail folders list by default. You can display the folders pane and the WebCenter Content Servers hierarchy as described in the following sections:

- [Showing the Folders Pane](#)
- [Showing the WebCenter Content Servers Hierarchy](#)

Figure 11–1 Integration Hierarchy in Microsoft Outlook 2007 (Native 11g User Interface)



Showing the Folders Pane

The folders pane contains the mail folders tree.

To show the mail folders pane in Microsoft Outlook:

- Open the **View** menu, then choose **Navigation Pane**, then choose **Normal**.

Showing the WebCenter Content Servers Hierarchy

To show the WebCenter Content Servers hierarchy in Microsoft Outlook:

1. Open the **WebCenter Content** menu or ribbon and then choose **Email Integration Settings....**

The Email Checkin Settings dialog opens.

2. Select or clear the **Show WebCenter Content Servers** check box to show or hide the integration hierarchy in your email application.
3. Click **OK**.

If you changed the check box status, a reminder is displayed saying that you must restart the email application for the change to take effect.

4. Click **OK** to return to Microsoft Outlook.

Important: Any changes will not take effect until you restart Microsoft Outlook.

11.2.2 Menus, Toolbars, and Ribbons

The Desktop client software adds menus, toolbars, and ribbons to Microsoft Outlook (or modifies them) as appropriate:

- [Additions to Outlook 2002, 2003, and 2007](#)
- [Additions to Outlook 2010 and 2013](#)

11.2.2.1 Additions to Outlook 2002, 2003, and 2007

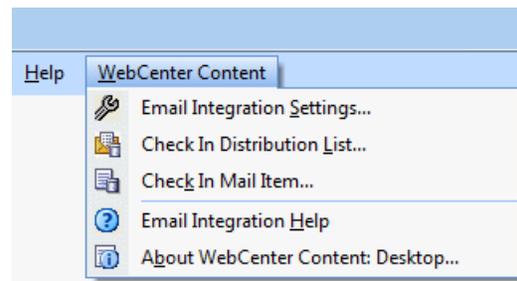
The Desktop client software adds two integration items to the Microsoft Outlook 2002, 2003, and 2007 interfaces:

- [WebCenter Content Menu](#)
- [WebCenter Content Toolbar](#)

WebCenter Content Menu

The Desktop client software adds a menu called **WebCenter Content** to the menu bar in Microsoft Outlook 2002, 2003, and 2007 ([Figure 11–2](#)).

Figure 11–2 *WebCenter Content menu in Microsoft Outlook 2007*



The WebCenter Content menu contains the following menu items:

- **Check In Mail Item...:** This option opens a dialog where you can check the currently selected email message in to a content server. For more information, see [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature."](#)
- **Check In Distribution List...:** This option opens a dialog where you can check an email distribution list in to a content server. For more information, see [Section 12.11, "Working with Distribution Lists."](#)
- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the email client integration.
- **Email Integration Help:** This option launches the Desktop online help in your standard web browser.

- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.

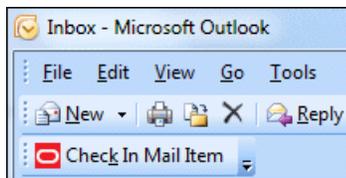
WebCenter Content Toolbar

The Desktop client software adds a toolbar called **WebCenter Content** to Microsoft Outlook 2002, 2003, and 2007. If you do not see the toolbar, you can display it by selecting **View**, then **Toolbars**, and then **WebCenter Content**.

The toolbar items depend on the application context. In the main Outlook window, the WebCenter Content toolbar contains the following option:

- **Check In Mail Item:** This option opens a dialog where you can check the currently selected email message in to a content server. (You can also use the WebCenter Content menu to do this.) For more information, see [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature."](#)

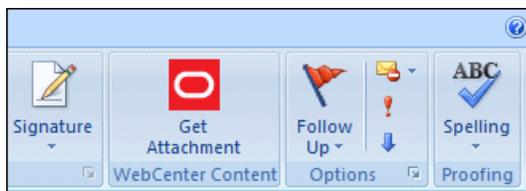
Figure 11–3 Check In Mail Item Option in Microsoft Outlook 2007



In an email editing window (new message or forward message), the WebCenter Content toolbar contains the following option:

- **Get Attachment:** This option opens a dialog where you can select a file on a content server to be attached to the current email message or hyperlinked in the message. For more information, see [Section 12.7, "Attaching Content Files on a Server to Email."](#)

Figure 11–4 Get Attachment Option in Microsoft Outlook 2007



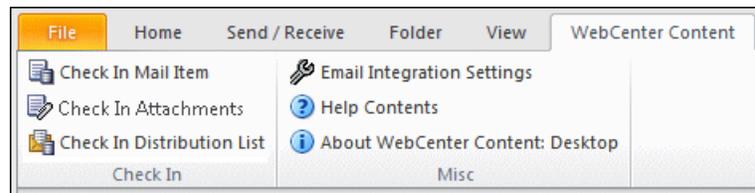
11.2.2.2 Additions to Outlook 2010 and 2013

The Desktop client software adds integration items to three ribbons in the Microsoft Outlook 2010 and 2013 interfaces:

- [WebCenter Ribbon](#)
- [Insert Ribbon](#)
- [Message Ribbon](#)

WebCenter Ribbon

The Desktop client software adds a ribbon called **WebCenter Content** to the Microsoft Outlook 2010 and 2013 interfaces ([Figure 11–5](#)).

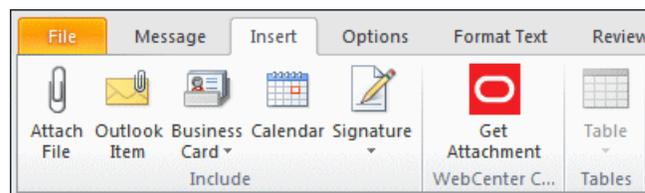
Figure 11–5 WebCenter Ribbon in Microsoft Outlook 2010

The WebCenter ribbon includes the following groups:

- **Check In:** This ribbon group contains the following option:
 - **Check In Mail Item:** This option opens a dialog where you can check the currently selected email message in to a content server. For more information, see [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature."](#)
 - **Check In Attachments:** This option is available when you select a single message that has attachments. It lets you check in attachments without checking in the email to which they are attached. For more information, see [Section 12.5.4, "Checking In Attachments Without Checking in the Email."](#)
 - **Check In Distribution List:** This option opens a dialog where you can check an email distribution list in to a content server. For more information, see [Section 12.11, "Working with Distribution Lists."](#)
- **Misc:** This ribbon group contains the following options:
 - **Email Integration Settings:** This option opens a dialog where you can set a number of configuration options for the email client integration.
 - **Help Contents:** This option launches the Desktop online help in your standard web browser.
 - **About WebCenter Content: Desktop:** This option opens a dialog that provides version information about the Desktop client software.

Insert Ribbon

The Desktop client software adds a **Get Attachment** item to the **Insert** ribbon in Microsoft Outlook 2010 and 2013 ([Figure 11–6](#)). This item opens a dialog where you can select a file on a content server to be attached to the current email message or hyperlinked in the message. For more information, see [Section 12.7, "Attaching Content Files on a Server to Email."](#)

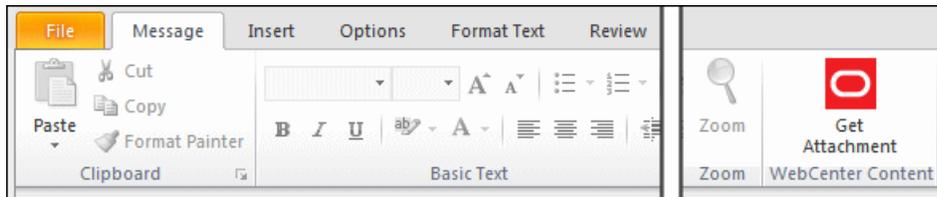
Figure 11–6 Integration Item in Insert Ribbon in Microsoft Outlook 2010

Message Ribbon

The Desktop client software also adds a **Get Attachment** item to the **Message** ribbon in Microsoft Outlook 2010 and 2013 ([Figure 11–7](#)). This item opens a dialog where you can select a file on a content server to be attached to the current email message or

hyperlinked in the message. For more information, see [Section 12.7, "Attaching Content Files on a Server to Email."](#)

Figure 11–7 Integration Item in Message Ribbon in Microsoft Outlook 2010



11.2.3 Content Pane and Preview Pane

The integration with Microsoft Outlook lets you drag and drop email messages into content server folders, copy and paste email, create shortcuts, and so on.

When you select an object in the WebCenter Content Servers hierarchy in the mail pane, the contents of that object are displayed on the right, in the content pane. It may, for example, show a list of all files in the current content folder.

Managed content files listed in the content pane may have a symbol in their file icon to indicate their content management status, and screen tips to provide other content management information (see "[Viewing Content Management Status and Other Information](#)").

In details view, the content pane includes a number of columns that show metadata information about the files or folders (for example, their title and content ID). You can change which metadata columns are displayed, as well as their default width and order (see "[Modifying the Column Settings in the Content Pane](#)").

You may also see a preview pane, which shows additional information about the selected item in the content pane (as examples: summary information, metadata, a preview). If you do not see the preview pane, you can enable it (see "[Showing the Preview Pane](#)").

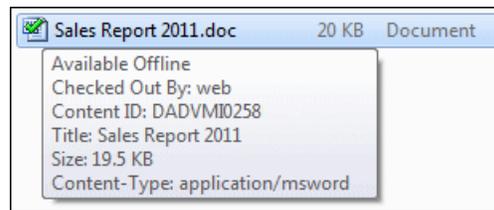
Viewing Content Management Status and Other Information

A symbol added to the file icon of managed content files indicates their content management status. For example, if the file is currently checked out by yourself, this is visualized using a green check mark, as shown in [Figure 11–8](#). For a full explanation of all content management status icons, see [Section 4.8, "Content File Status."](#)

Figure 11–8 Status Icon Overlaid on Top of Microsoft Word Application Icon



Additionally, if you hover your mouse cursor over a managed file in the content pane, a screen tip is displayed providing content management information about that file, as shown in [Figure 11–9](#).

Figure 11–9 Screen Tip Showing Content Management Information About File**Modifying the Column Settings in the Content Pane**

To change the column display settings:

1. Go to any folder on the content server in the WebCenter Content Servers hierarchy for which you want to change the column display settings.
2. Right-click any of the column headings in the content pane, and choose **Column Settings...**

The Column Settings dialog opens.

3. Make changes to the column display, order, and width settings as desired.
4. Click **OK** when you are done. (The changes take effect immediately and they apply to the entire content server.)

Note: You can also change the width of a column by dragging its right handle.

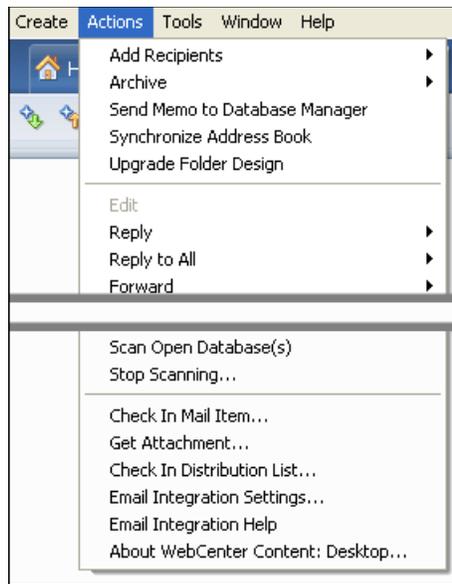
Showing the Preview Pane

To show the preview pane:

1. Select the WebCenter Content Servers node in the Mail Folders pane.
2. Right-click in an unused area of the content pane.
3. In the context menu, select **View**, then select **Preview Pane**.

11.3 Integration into Lotus Notes

For supported versions of Lotus Notes and Lotus Domino mail databases, the Desktop client software adds a number of new items to the **Actions** menu in Lotus Notes (Figure 11–10).

Figure 11–10 Actions Menu in Lotus Notes 8.5

The standard **Actions** menu in Lotus Notes includes the following integration items:

- **Check In Mail Item...:** This option opens a dialog where you can check the currently selected email message in to a content server. For more information, see [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature."](#)
- **Get Attachment...:** This option opens a dialog where you can select a file on a content server to be attached to the current email message or hyperlinked in the message. For more information, see [Section 12.7, "Attaching Content Files on a Server to Email."](#)
- **Check In Distribution List...:** This option opens a dialog where you can check an email distribution list in to a content server. For more information, see [Section 12.11, "Working with Distribution Lists."](#)
- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the email client integration.
- **Email Integration Help:** This option launches the Desktop online help in your standard web browser.
- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.

Working with Managed Email

This section covers these topics:

- [Section 12.1, "About Email Client Integration"](#)
- [Section 12.2, "Email Specific Metadata on Oracle WebCenter Content Server"](#)
- [Section 12.3, "Default Email Metadata and File Names"](#)
- [Section 12.4, "Setting the Email Attachment Option"](#)
- [Section 12.5, "Checking In Email"](#)
- [Section 12.6, "Inserting Links to Content Files on a Server into Email"](#)
- [Section 12.7, "Attaching Content Files on a Server to Email"](#)
- [Section 12.8, "Creating a New Email that Includes Links to a File"](#)
- [Section 12.9, "Opening Checked-In Email Messages"](#)
- [Section 12.10, "Viewing All Your Workflow Assignments"](#)
- [Section 12.11, "Working with Distribution Lists"](#)

Note: See also [Chapter 6, "Working with Managed Content Files in Windows Explorer."](#)

12.1 About Email Client Integration

Email client integration enables you to check email messages and their attachments in to a content server directly from Microsoft Outlook or Lotus Notes and share them with others in your organization. In Microsoft Outlook, you can drag and drop emails directly into content folders on a server, or you can use a special content check-in form (Oracle WebCenter Content Server only). You can also attach managed content items from the server as well as links to them to your outgoing emails.

Checked-in email messages are not intended to be checked out, modified, and checked back in. Email messages are checked in to a content server for the express purpose of preserving them exactly as they were received. You can open a checked-in email message from a server to view it in your default email application. You can even make changes if you want, but you cannot check it back in to the server. You can, however, send the message to other people or save a copy on your local computer.

See [Chapter 11, "Understanding Email Client Integration"](#) for details on how the Desktop client software integrates with your email client application.

See [Chapter 4, "Understanding Enterprise Libraries, Folders, and Files"](#) for general information about content folders and files.

12.2 Email Specific Metadata on Oracle WebCenter Content Server

This section applies only when connected to a server that is using the native 11g user interface.

With the Desktop components installed on an Oracle WebCenter Content Server instance, the content check-in form typically includes six email specific metadata fields, providing they were enabled on the content server (see [Table 12–1](#) below). These are all optional metadata fields, which means you do not need to provide values for them in order to check in an email message. If used, these metadata fields are pre-populated with available values when you check an email message or attachment in to the content server.

Table 12–1 Email Specific Metadata Fields

Field Label on Content Check-in Form	Field Name in Content Server	Description
Author Or Originator	EmailFrom	The sender of the email message (that is, the name in the 'From' field).
Addressee(s)	EmailTo	The recipient or recipients of the email message (that is, the name or names in the 'To' field).
Other Addressee(s)	EmailCC	The other recipients of the email message (that is, the names in the 'Cc' field). Any names in the 'Bcc' field are ignored.
Email Subject	EmailSubject	The subject line of the email message.
Publication Date	PublicationDate	This is the date and time that the email message was sent (as recorded in the message header).
Received Date	ReceiveDate	This is the date and time that the email message was received (as recorded in the message header).

12.3 Default Email Metadata and File Names

Oracle WebCenter Content Server

Oracle WebCenter Content Server can store multiple files of the same name as separate content items. However, in the integration of Oracle WebCenter Content Server with your Windows desktop application, file names in content folders need to be unique (in the same way that a folder in Windows cannot contain two files of the same name). Because of this requirement, when you add an email to a content folder that already contains an email of the same name, it is automatically checked in as a new revision to the existing item on the server. For example, if *Our discussion.msg* is in a folder on the server and you add a second *Our discussion.msg* file to that same folder, then the second file becomes a new revision of the first file. If *Our discussion.msg* is in a folder and you add *Our recent discussion.msg* or *Our discussion.eml* to that folder, then they remain separate content items because they have different file names.

The file name that is displayed in the Name column in Windows Explorer or your email application and in the Name field of the Content Properties dialog is the same as the original file name in the content server repository. When you rename content through the Windows Explorer integration, the original file name also changes to reflect the new name.

If Oracle WebCenter Content Server is set up to automatically generate content IDs, then the content IDs follow the established numbering convention. If this option is not enabled, checking in a new content item through Windows Explorer or an email client generates a unique sequential content or message ID.

Oracle Content Database Servers and Other WebDAV Servers

Content folders on Oracle Content Database servers and other WebDAV servers behave exactly like Windows folders on your local computer. If you copy a file to a folder on the server that already contains a file of the same name, then the existing file is simply overwritten. (Contrary to Oracle WebCenter Content Server, there is no revisioning on these servers.)

12.4 Setting the Email Attachment Option

When you check email messages with attachments in to the content server, you have the option of checking in an attachment separately from its email message or checking in both as a single content item. You can set this to be handled automatically. If you prefer, you can, instead, be prompted to make the choice when you check each email message with an attachment in to the server.

Note: An "attachment" is any file formally attached to an email.

To set how email attachments are handled during check-ins:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Email Integration Settings...**

Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon, select **Options**, then select **Email Integration Settings**.

Lotus Notes: Open the **Actions** menu and then select **Email Integration Settings...**

The Email Checkin Settings dialog opens.

3. Select the appropriate option to specify how attachments to email messages should be handled when checking email messages with attachments in to the content server:
 - **Separate Attachments:** Each email attachment is checked in to the content server as a separate item from the email message, each with its own content ID. The body text of the checked-in email message will include links to each of the checked-in attachments.
 - **Keep Attachments:** The attachment is embedded in the email message and both are checked in as a single content item with a single content ID. The attachment is embedded in the email message.
 - **Ask:** You are prompted to specify how each email attachment should be handled every time you check in an email message with one or more attachments.

This setting applies only if you check in an email using the Check In Mail Item feature in Microsoft Outlook or Lotus Notes. It does not apply if you drag and drop an email into a content folder (a Microsoft Outlook feature). In that case, the email is always checked in with its attachments embedded.

4. Click **OK** to close the Email Checkin Settings dialog. The setting takes effect immediately.

12.5 Checking In Email

Once you have integrated your email application with a content server and connected your computer to the server, you are ready to use the content server for storing email messages and attachments and sharing them with others in your organization.

This section covers these topics:

- [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature"](#)
- [Section 12.5.2, "Checking In Email Messages By Dragging and Dropping"](#)
- [Section 12.5.3, "Checking In Email Messages with Attachments"](#)
- [Section 12.5.4, "Checking In Attachments Without Checking in the Email"](#)

Check In Email After Sending

If enabled on the content server and in your user settings, the process to check in your emails will be started automatically as soon as you send them.

12.5.1 Checking In Email Messages Using the Check In Mail Item Feature

You can check email messages in to an Oracle WebCenter Content Server instance directly from your email application (Microsoft Outlook or Lotus Notes). When you check an email in to an Oracle WebCenter Content Server instance using the Check In Mail Item feature, the original email is preserved in your email application. This is different from the drag-and-drop method (see [Section 12.5.2, "Checking In Email Messages By Dragging and Dropping"](#) below), which removes the item from your email application (unless you hold the Ctrl key while dragging and dropping the item).

The suggested file name of a checked-in Microsoft Outlook email message is usually a combination of its subject line and the date it was received, and for a Lotus Notes message it is usually its subject line. However, files can be named in other ways (for example using other attributes of the email, the email message ID, or a uniquely generated code) depending on how your system has been configured. Characters not allowed in Windows file names are replaced by spaces. You may change the title as needed before completing the check-in. Microsoft Outlook messages are checked in as .msg files, and Lotus Notes messages as .eml files.

When you check in an email message with attachments, these attachments are handled in accordance with the metadata prompting setting (see [Section 4.11, "Enabling Metadata Prompting for Enterprise Libraries and Folders"](#)). Each attachment may automatically be checked in to the content server as a separate item from the email message or together with (that is, embedded in) the email. You may also be asked which of these two options you want to use.

Note: Outlook VCard (.vcf) files are not checked in to the content server.

To check one or more email messages in to an Oracle WebCenter Content Server instance using the Check In Mail Item feature:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. Select the email message or messages you want to check in to an Oracle WebCenter Content Server instance. You can select multiple messages if you want. Each message will be checked in as a separate content item on the server.
3. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Mail Item....** Alternatively, you can also click the **Check In Mail Item** button on the WebCenter Content toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **WebCenter Content** to enable it.)
Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Mail Item**.

Lotus Notes: Open the **Actions** menu and then select **Check In Mail Item....**

4. If the email message has any attachments, the Attachment Options dialog may be displayed, depending on your Desktop configuration.

The Attachment Options dialog lists all detected attachments to the current email message. Select the check box next to an attachment if you want to embed the attachment into the email message and check the attachment and message in to the content server as a single item. Clear the check box if you want to check in the attachment as a separate item with its own content ID. The body of the checked-in email message will then include links to each of the checked-in attachments.

5. The Check In Content dialog opens. (You may be prompted to enter your login credentials first.)

Note: You check in one email message or attachment at a time. If you selected multiple messages or if attachments will be checked in separately, the Check In Content dialog will reopen for each item to be checked in. Attachments are checked in before their associated email message.

6. In the **Server** list, select the Oracle WebCenter Content Server instance that you want to check the email message or attachment in to. When you select a new server, you may be prompted to enter your login credentials first (depending on how the server has been set up).

The list of available servers includes only Oracle WebCenter Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle WebCenter Content Server check-in functionality.

7. In the **Profile** list, select the content profile that should be applied to the check-in form (providing any profiles are defined on the content server). Content profiles are used to limit the metadata fields shown on the check-in form (and also several other content server pages), depending on the type of content. For example, a "Sales" profile might show metadata fields for revenue numbers, sales forecasts, and the like, whereas a "Support" profile might show metadata fields for case number, status, and the like.

Profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3 servers.

8. Complete the **check-in form**.

In the native 11g user interface, the following defaults are used for some of the metadata fields:

- **Title:** For email messages, the title defaults to the subject line of the email message (unless your server administrator changed the configuration to use the email message ID as the content item title). For attachments, the title defaults to the file name. You can modify the title if you want.
- **Author:** This shows the content server user who is checking in the email message.)
- **Addressee(s):** This is the recipients of the email messages ('To' field), as retrieved from the email header.
- **Other Addressee(s):** These are the additional recipients of the email message ('Cc' field), if any, as retrieved from the email header. Any names in the 'Bcc' field are ignored.
- **Email Subject:** This is the subject line of the email message, as retrieved from the email header.

Different metadata fields are visible depending on the content server configuration. Metadata fields may have default values if you set up Desktop to "remember" the metadata used for the last check-in of an email or attachment. For more information, see [Section 2.14, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

If you want the content item to show up in a content folder on the server, make sure that you specify the location in the **Folder** field.

All mandatory metadata fields are marked with an asterisk (*). The email message cannot be checked in if any of these fields is empty.

In the native 11g user interface, you can use the **Reset** button at the bottom of the form to revert the form to its initial state (that is, remove any data that you entered on the form).

9. Click **OK** to check the email message or attachment in to the selected Oracle WebCenter Content Server instance. If there are multiple messages or separate attachments for check-in, the Check In Content dialog reopens and you can repeat the check-in process for each item.

Tip: Attachments are always checked in first, followed by their associated email message. You can check in an attachment by itself. After the attachment is checked in, simply cancel the content check-in form when it reappears for checking in the email message.

12.5.2 Checking In Email Messages By Dragging and Dropping

This feature is available only for integrations with Microsoft Outlook.

As an alternative to checking in email messages using the Check In Mail Item feature (see [Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature"](#) above), you can also select the email message or messages to be checked in and use your mouse to drag and drop them into the desired content folder on a server. When you drag and drop an email into a content folder on a server, the original email is removed from your email application unless you hold the Ctrl key while dragging and dropping the item. This is different from the Check In Mail Item feature, which always preserves the original email in your email application.

The file name of a checked-in email message is usually a combination of its subject line and the date it was received. However, files can be named in other ways (for example using other attributes of the email, the email message ID, or a uniquely generated code) depending on how your system has been configured. Characters not allowed in Windows file names are replaced by spaces. In some configurations, if you drag and drop an email message into a content folder that already has an email with the same file name, then a sequence number in parentheses is added to the file name (for example, "Re Our Discussion (2).msg"). In other configurations, such duplication may not be allowed. Microsoft Outlook messages are checked in as .msg files.

When you drag and drop an email message with attachments into a content folder on a server, these attachments are always checked in together with (that is, embedded in) the email, regardless of the metadata prompting setting (see [Section 4.11, "Enabling Metadata Prompting for Enterprise Libraries and Folders"](#)).

Note: Outlook VCard (.vcf) files are not checked in to the content server.

When you drag and drop a new email message into a content folder on an Oracle WebCenter Content Server instance, you may be asked to provide metadata for the message, depending on the settings for that content folder (see [Section 4.11, "Enabling Metadata Prompting for Enterprise Libraries and Folders"](#)). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the content folder (see [Section 4.5, "Content File Metadata"](#)).

To check one or more email messages in to a content server by dragging and dropping:

1. Open Microsoft Outlook.
2. Select the email message or messages you want to check in to a content server. You can select multiple messages if you want. Each message will be checked in as a separate content item on the server.
3. Use your mouse to drag and drop the selected email message or messages to a content folder on a server in the mail folders pane.
4. If you dragged and dropped the email to an Oracle WebCenter Content Server instance or Oracle Content Database Server instance, and if metadata prompting is enabled for the content folder, the Check In Content dialog opens. If metadata prompting is disabled for the folder, or if you dragged and dropped the email to another type of WebDAV server, the file is checked in without any further prompting. You can then skip the remainder of this procedure.
5. The **Source File** field in the Check In Content dialog shows the email message file that will be checked in. It is located in a temporary location on your local computer. By default, the file name is the email subject line (with characters not allowed in Windows file names replaced by spaces). However, your server administrator may have changed the configuration to use the email message ID as the file name. Microsoft Outlook messages are checked in as .msg files.
6. In the **Profile** list, select the content profile that should be applied to the check-in form (providing any profiles are defined on the content server). Content profiles are used to limit the metadata fields shown on the check-in form (and also several other content server pages), depending on the type of content. For example, a "Sales" profile might show metadata fields for revenue numbers, sales forecasts, and the like, whereas a "Support" profile might show metadata fields for case number, status, and the like.

Profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3 servers.

7. Complete the **check-in form**.

Different metadata fields are visible depending on the content server configuration.

Some metadata fields are automatically populated with information retrieved from the email header and other sources. For example:

- **Title:** This defaults to the subject line of the email message (unless your server administrator changed the configuration to use the email message ID as the content item title). You can modify the title if you want.
- **Author:** This shows the content server user who is checking in the email message.)
- **Addressee(s):** This is the recipients of the email messages ('To' field).
- **Other Addressee(s):** These are the additional recipients of the email message ('Cc' field), if any. Any names in the 'Bcc' field are ignored.
- **Email Subject:** This is the subject line of the email message.

Some metadata fields may have default values if you set up Desktop to "remember" the metadata used for the last check-in of an email or attachment. For more information, see [Section 2.14, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

If you want the content item to show up in a content folder on the server, make sure that you specify the location in the **Folder** field.

All mandatory metadata fields are marked with an asterisk (*). The email message cannot be checked in if any of these fields is empty.

In the native 11g user interface, you can use the **Reset** button at the bottom of the form to revert the form to its initial state (that is, remove any data that you entered on the form).

8. Click **Finish** to check the email message in to the selected content folder. If you had selected multiple messages for check-in, the Check In Content dialog reopens and you can repeat the check-in process for each message.

12.5.3 Checking In Email Messages with Attachments

When you check in an email message with one or more attachments, the way the attachments are handled depends on the check-in method and your configuration, as outlined in [Table 12-2](#) below.

Table 12-2 Handling of Email Attachments

Check-in Method	Check in to Oracle WebCenter Content Server	Check in to Oracle Content DB or other WebDAV server
Check In Mail Item feature (see Section 12.5.1, "Checking In Email Messages Using the Check In Mail Item Feature")	Attachments are checked in according to the setting in the Email Checkin Settings dialog.	n/a

Table 12-2 (Cont.) Handling of Email Attachments

Check-in Method	Check in to Oracle WebCenter Content Server	Check in to Oracle Content DB or other WebDAV server
Dragging and dropping (Microsoft Outlook only - see Section 12.5.2, "Checking In Email Messages By Dragging and Dropping")	Attachments are always checked in along with the email messages (that is, embedded in them).	Attachments are always checked in along with the email messages (that is, embedded in them).

If attachments are checked in to an Oracle WebCenter Content Server instance as separate content items, the content information page of their associated email message will contain links to each of the checked-in attachments. These links point to the most recent revision of each attachment. However, if the server is using the RmaEmail component, the links will always point to the first revision, regardless of whether the content item has newer revisions. Also, Outlook VCard (.vcf) files are not checked in to the content server.

12.5.4 Checking In Attachments Without Checking in the Email

Note: This feature is available only for Microsoft Outlook 2010 and later.

You can check in attachments without checking in the email to which they are attached.

To check in only the attachments:

1. Open your email application (Microsoft Outlook only).
2. Select the email message with the attachments that you want to check in.
You can check in attachments for one message at a time. If you select more than one message, the option to check in attachments is unavailable.
3. Open the **WebCenter Content** ribbon and select **Check In Attachments**.
4. On the Check In Attachments dialog, select the attachments that you want to check in, then click **OK**.
5. On the Check In Content dialog, in the **Server** list, select the Oracle WebCenter Content Server instance that you want to check the first (or only) attachment in to.
6. In the **Profile** list, select the content profile that should be applied to the check-in form (if any).
7. Complete the **check-in form**.
If you want the content item to show up in a content folder on the server, make sure that you specify the location in the **Folder** field.
8. Click **OK** to check the attachment in to the selected Oracle WebCenter Content Server instance.

If you selected multiple attachments to be checked in, the Check In Content dialog reopens and you can repeat the check-in process for each item.

12.6 Inserting Links to Content Files on a Server into Email

You can insert links to content files on a server into an email message. You can provide your own link text and also specify the link target file rendition.

Note: If you use Microsoft Word as your email editor in Microsoft Outlook, you can right-click and insert links through the context menu.

To insert links to content items on a server into an email:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. Create or open an email message.
3. **Microsoft Outlook 2002, 2003, and 2007:** Click the **Get Attachment** button on the WebCenter Content toolbar.

Microsoft Outlook 2010 and 2013: Open the Insert or Message ribbon and then select **Get Attachment**.

Lotus Notes: Open the **Actions** menu and then select **Get Attachment...**

4. The Get Attachment dialog opens.
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to link to in the email. The list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to include in the email, the **Content Item** field shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

6. In the Get Attachment dialog, select the **Link** panel.
7. For each selected file, provide the **link text** for the hyperlink that will be inserted in the email message. The default is the file name of the content item (without the file extension), but you can modify this as needed. The link is inserted into the email message as "*Specified_Link_Text: URL_To_Content_Item,*" for example:

John Doe has shared the following files with you. view them by clicking on the links below:

Latest Sales Report Microsoft Word Document, 10 KB
http://server.example.com/cs/idcplg?IdcService=GET_FILE&dDocName=ID1003&RevisionSelectionMethod=LatestReleased
 Open WebCenter Content Server

If you specify no link text, only the URL is inserted.

8. For each selected file, select the **file rendition** that the hyperlink should point to:
 - **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).

- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
 - **HTML Rendition:** This links to an HTML version of the original file, as converted on the content server when the file is requested for viewing.
 - **Content Information page:** This links to the page on the content server that provides metadata information about the content item (title, author, and so on). This page also includes links to the various available renditions of the content item.
9. For each selected file, specify whether the hyperlink should always point to the **latest revision**. If you select the check box, the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.
 10. Click **OK** to insert the hyperlink or hyperlinks into the email message.

12.7 Attaching Content Files on a Server to Email

You can attach one or more content files on a server to an email message.

Note: If you use Microsoft Word as your email editor in Microsoft Outlook, you will not be able to use the Desktop attachment feature. To use this feature, you need to use Microsoft Outlook's own HTML or text editor.

To attach content items on a server to an email:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. Create or open an e-mail message.
3. **Microsoft Outlook 2002, 2003, and 2007:** Click the **Get Attachment** button on the WebCenter Content toolbar.

Microsoft Outlook 2010 and 2013: Open the Insert or Message ribbon and then select **Get Attachment**.

Lotus Notes: Open the **Actions** menu and then select **Get Attachment...**

4. The Get Attachment dialog opens.
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to attach to the email. The list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to attach to the email. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to attach to the email, the **Content Item** field shows their content IDs. If you selected multiple files, the

Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

6. In the Get Attachment dialog, select the **File** panel.
7. For each selected file, select the **file rendition** that you want to attach to the email:
 - **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
 - **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
8. Click **OK** to attach the selected content item or items to the email message.

12.8 Creating a New Email that Includes Links to a File

Note: This procedure applies when using the native 11g user interface.

When you select a file in the content folder hierarchy, you see information about that file in the preview pane. For WebCenter Content Server instances, this will be the content information page from the server; for other servers, the preview pane lists some basic file information, including its URL. You can use the **Send link by email** option in the preview pane to create a new email that includes links to the currently selected file.

To create an email that includes links to a file:

1. Select the file in the content folder hierarchy (in Windows Explorer, or in the mail pane of Microsoft Outlook, as available).
2. **WebCenter Content servers:** From the **Email** menu, select **Send link by email**.

A new email message opens. The subject of the message is **Re :** followed by the title of the linked file. In the body of the email, three links are inserted, one to the web-viewable version of the file, one to the native version of the file, and one to the content info page for the file. If you do not want to include one of these links, you can delete it before sending the email.

Content DB or WebDAV servers: In the preview pane, select **Send link by email**.

A new email message opens. The subject of the message is **Re :** followed by the name of the file. In the body of the email, enclosed in angle brackets, is a URL that points to a web-viewable version of the file on the server.

You can now complete the email and send it.

12.9 Opening Checked-In Email Messages

You can open a checked-in email message from a server to view it in your default email application. You can even make changes if you want, but you cannot check it back in to the server. You can, however, send the message to other people or save a

copy on your local computer. Email messages are checked in to a content server for the express purpose of preserving them exactly as they were received.

Microsoft Outlook

Browse the content folders on a server to find the email message you want to view. To open an email file, double-click the file or right-click it and choose **View** from the context menu.

Note: Do not choose **Open** in the context menu of checked-in email files. This will check out the file, but you cannot check it back in (just undo the check-out).

Windows Explorer

In Windows Explorer, you can browse to email files in content folders on a server, but you can also search for them (see [Section 6.4, "Searching for Content Files"](#)). Once you have located the email message you want to view, right-click the file and choose **View** from the context menu.

12.10 Viewing All Your Workflow Assignments

You can view all your current workflow assignments for an Oracle WebCenter Content Server instance in one convenient list in your email application. This list shows all files currently in a workflow that you are assigned to review. You can approve or reject the files directly from the list.

Note: This is available only if you are connecting to a Content Server 11g instance.

To see a list of all your current workflow assignments on a content server:

1. Open your email application, and make sure the folders pane is visible.
2. Open the **WebCenter Content Servers** node. If you do not see this node in your email application, enable it first (see "[Showing the WebCenter Content Servers Hierarchy](#)").
3. Click the server for which you want to see all your workflow assignments. If prompted, log in by entering your user name and password for that server.
4. Find and select the **My Workflow Assignments** node. This node may be nested beneath the Users node.

If the server does not have a node called My Workflow Assignments, then workflow assignments may not be enabled on the server, or the server is not a Content Server 11g instance.

The content pane lists all files on the server that you have currently been assigned to review. This list matches that in Oracle WebCenter Content Server's web interface (under My Content Server). You can work with the files in this list directly to review them (see [Section 7.3, "Approving or Rejecting Files in Workflows"](#)).

12.11 Working with Distribution Lists

Note: Support for distribution lists is disabled by default. To use the distribution list features described in this section, you must enable them by checking the Support Distribution Lists option, which is on the Email Checkin Settings dialog. You can open this dialog from the **WebCenter Content** menu or ribbon (or the **Actions** menu in Lotus Notes) and choosing **Email Integration Settings....**

A distribution list is a collection of email addresses grouped under a common name. Any message addressed to the group name is sent to everyone on the list. You can check distribution lists in to an Oracle WebCenter Content Server instance (providing it is running the RmaEmail component). You cannot check distribution lists in to Oracle Content DB server or other WebDAV servers.

You can check in distribution lists that already exist in a Microsoft Outlook address book or new ones that you create. Once the distribution list is checked in, you can edit it, as needed.

You work with distribution lists from the Distribution List Checkin dialog:

- In Microsoft Outlook, open the **WebCenter Content** menu or ribbon and then select **Check In Distribution List...**
- In Lotus Notes, open the **Actions** menu and then select **Check In Distribution List...**

Note: If you use Microsoft Word as your email editor in Microsoft Outlook, you will not be able to check in distribution lists. To use this feature, you need to use Microsoft Outlook's own HTML or text editor.

The Distribution List Checkin dialog is used for the following:

- [Checking In a New Distribution List](#)
- [Checking In a Distribution List From the Microsoft Outlook Address Book](#)
- [Editing a Distribution List](#)
- [Deleting a Distribution List](#)

12.11.1 Checking In a New Distribution List

You can create a new email distribution list and then check that list in to an Oracle WebCenter Content Server instance. To do so, perform these steps:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Click **Add**.
The Edit Distribution List dialog opens.
5. In the **List name** field, enter the name of the new distribution list that you are creating.
6. In the **Name** field, enter the person's name as you would like it to display in the distribution list.
7. In the **Address** field, enter that person's email address.
8. Click **Add**.
Repeat steps 6 through 8 for each new member you want to add to the distribution list.
9. When you are finished adding the names and addresses for the distribution list, click **OK** to open the distribution list check-in form.
10. Specify the appropriate metadata for the distribution list and click **Check In**.
The distribution list is checked in to the current Oracle WebCenter Content Server instance.
11. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

Once the distribution list is checked in to the content server, it is included in the Distribution List Checkin dialog for that server.

12.11.2 Checking In a Distribution List From the Microsoft Outlook Address Book

You can select an email distribution list that already exists in your Microsoft Outlook address book and check that list in to an Oracle WebCenter Content Server instance. To do so, perform these steps:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**
Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.
Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**
3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Click **Address Book**.
The Check In Distribution List From Address Book dialog opens.
5. In the **Show lists from** list, select the group in Microsoft Outlook that contains the distribution list you are checking in to the content server.
6. From that group, select the distribution list that you want to check in.
If you want, click **Details...** to open the properties dialog for the distribution list, including the list of addressees. This dialog is the same one that displays in

Microsoft Outlook for viewing the details of a distribution list. To modify the properties, follow the instructions in Microsoft Outlook Help.

7. When you are ready to check in the distribution list, click **Check in** in the Check In Distribution List From Address Book dialog to open the distribution list check-in form.
8. Specify the appropriate metadata for the distribution list and click **Check In**.
The distribution list is checked in to the current Oracle WebCenter Content Server instance.
9. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

Once the distribution list is checked in to the content server, it is included in the Distribution List Checkin dialog for that server.

Note: If you use Microsoft Word as your email editor in Outlook 2002 (XP), you are not able to check in a distribution list. To use this feature, you need to switch to Microsoft Outlook's HTML or text editor.

12.11.3 Editing a Distribution List

Once you check a distribution list in to an Oracle WebCenter Content Server instance, you can modify the list by adding, changing, or removing information. Also, you can clear the information in the name and address fields by clicking **Reset**.

Important: Changes you make to the list are reflected only in the version checked in to the content server. If the list is also used in Microsoft Outlook, that version remains unchanged. When you edit a distribution list that is checked in to the content server, you can create a new revision or a new content item when you save the list.

Adding a New Member to an Existing Distribution List

To add a new member to an existing distribution list:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Select the distribution list that you want to add a new member to.
5. Click **Edit**.

The Edit Distribution List dialog opens.

6. The **List name** field shows the name of the current distribution list. You cannot modify this information.

7. To add a new list member, enter a new name in the **Name** and **Address** fields. When you first open the Edit Distribution List dialog, you see the name and address fields already populated with the details of the first member in the list. To add a new member, simply overwrite these values with the name and address of the new member. This will not remove the original first addressee in the list.
8. Click **Add** to add the new member to the distribution list.
Repeat steps 6 through 8 for each new member you want to add to the distribution list.
9. When you are finished adding new members to the distribution list, click **OK** to close the Edit Distribution List dialog.
A message appears, prompting you to either check in the distribution list as a new content item or as a revision to the existing item.
10. To check in the distribution list as a new content item, choose **New Content Item**. Then, provide a new name for the distribution list and click **OK** to open the content check-in form.
To check in the distribution list as a revision to the existing content item, choose **New Revision** to open the content check-in form.
11. Provide or modify the appropriate metadata for the distribution list as needed, and click **Check In**.
The distribution list is checked in to the current Oracle WebCenter Content Server instance.
12. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

Changing the Name or Address of a Distribution List Member

To change the name or address of a member of a distribution list:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**
Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.
Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**
3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Select the distribution list that contains the member whose name or address you want to modify.
5. Click **Edit**.
The Edit Distribution List dialog opens.
6. The **List name** field shows the name of the current distribution list. You cannot modify this information.
7. Select the list member whose name or address you want to modify.
8. Update the **Name** and/or **Address** field as appropriate and click **Modify** to save the changes.

Repeat steps 7 and 8 for each list member whose name and/or address you want to modify.

9. When you are finished modifying list member information, click **OK** to close the Edit Distribution List dialog.

A message appears, prompting you to either check in the distribution list as a new content item or as a revision to the existing item.

10. To check in the distribution list as a new content item, choose **New Content Item**. Then, provide a new name for the distribution list and click **OK** to open the content check-in form.

To check in the distribution list as a revision to the existing content item, choose **New Revision** to open the content check-in form.

11. Provide or modify the appropriate metadata for the distribution list as needed, and click **Check In**.

The distribution list is checked in to the current Oracle WebCenter Content Server instance.

12. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

Deleting a Member from a Distribution List

To delete a member from a distribution list:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Select the distribution list that contains the member that you want to remove from the list.
5. Click **Edit**.

The Edit Distribution List dialog opens.

6. The **List name** field shows the name of the current distribution list. You cannot modify this information.
7. Select the list member that you want to remove from the distribution list.
8. Click **Delete** to remove the selected list member, and click **Yes** to confirm the operation.

Repeat steps 7 and 8 for each member that you want to remove from the distribution list.

9. When you are finished removing list members, click **OK** to close the Edit Distribution List dialog.

A message appears, prompting you to either check in the distribution list as a new content item or as a revision to the existing item.

10. To check in the distribution list as a new content item, choose **New Content Item**. Then, provide a new name for the distribution list and click **OK** to open the content check-in form.

To check in the distribution list as a revision to the existing content item, choose **New Revision** to open the content check-in form.

11. Provide or modify the appropriate metadata for the distribution list as needed, and click **Check In**.

The distribution list is checked in to the current Oracle WebCenter Content Server instance.

12. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

Note: If you use Microsoft Word as your email editor in Outlook 2002 (XP), you will not be able to check in a distribution list. To use this feature, you need to switch to Microsoft Outlook's HTML or text editor.

12.11.4 Deleting a Distribution List

You can delete a distribution list from Oracle WebCenter Content Server. When you do so, all revisions of that distribution list will be removed. If the list is also used in Microsoft Outlook, it remains unchanged and is still available through Microsoft Outlook.

To delete a distribution list:

1. Open your email application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010 and 2013: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens. (You may be prompted to enter your login credentials first.)
4. Select the distribution list that you want to remove from the content server.
5. Click **Delete** to remove the selected distribution list, and click **Yes** to confirm the operation.
6. Click **Close** to close the Distribution List Checkin dialog.

Part V

Web Browser Integration

This part describes how Oracle WebCenter Content: Desktop is integrated into web browsers. It also describes how to use this integration.

Part V contains the following chapter:

- [Chapter 13, "Working with the Web Browser Integration"](#)

Working with the Web Browser Integration

This section covers these topics:

- [Section 13.1, "Web Browser Search Plug-In"](#)
- [Section 13.2, "Adding the Oracle WebCenter Content Search Provider in Your Web Browser"](#)
- [Section 13.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine"](#)
- [Section 13.4, "Searching for Managed Content in Your Web Browser"](#)
- [Section 13.5, "Removing the Oracle WebCenter Content Search Provider from Your Web Browser"](#)

13.1 Web Browser Search Plug-In

Oracle WebCenter Content: Desktop 11gR1 provides plug-ins for various popular web browsers which enable you to search for content on an Oracle WebCenter Content Server instance directly from the search field in your web browser. The following web browsers are supported:

- Microsoft Internet Explorer 8.0 or higher
- Mozilla Firefox 3.5 or higher
- Google Chrome 10 or higher

Please note the following:

- The Oracle WebCenter Content Server browser plug-in is available only if this feature has been enabled on the content server (on the DesktopIntegrationSuite component configuration page).
- The default search provider name for an Oracle WebCenter Content Server instance is 'Oracle WebCenter Content Search', but this can be changed by the content server administrator. Contact your Content Server system administrator if you are not sure what the search provider name for an Oracle WebCenter Content Server instance is.
- A content server search provider in your web browser is for a specific Oracle WebCenter Content Server instance only. You cannot search multiple content servers using a single search provider.
- You cannot add two search providers for the same Oracle WebCenter Content Server instance. Once you have added a search provider, it will not be added again for the same Content Server instance.

- The search results are displayed in the web browser, in the Oracle WebCenter Content Server web interface. See *Using Oracle WebCenter Content* for more information on working with the web interface.
- If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.
- The search performed in your web browser mimics the Quick Search feature in the Oracle WebCenter Content Server web interface. See the *Using Oracle WebCenter Content* for further details on this feature.
- See [Section 13.4, "Searching for Managed Content in Your Web Browser"](#) for more information on how to use the Oracle WebCenter Content Search provider in your web browser.

13.2 Adding the Oracle WebCenter Content Search Provider in Your Web Browser

The procedure to add the Oracle WebCenter Content search engine depends on the web browser:

- [Section 13.2.1, "Adding the Oracle WebCenter Content Search Provider in Internet Explorer"](#)
- [Section 13.2.2, "Adding the Oracle WebCenter Content Search Engine in Firefox"](#)
- [Section 13.2.3, "Adding the Oracle WebCenter Content Search Engine in Google Chrome"](#)

Note: Ask the server administrator if you are not sure if the web browser plug-in has been enabled for that server.

13.2.1 Adding the Oracle WebCenter Content Search Provider in Internet Explorer

You can add a search provider for an Oracle WebCenter Content Server instance in Internet Explorer in either of two ways:

- Using the My Downloads page in the Oracle WebCenter Content Server web interface
- Using the search box in Internet Explorer

Note: The search box method is supported in Internet Explorer 8 and Internet Explorer 10.

Adding the Oracle WebCenter Content Search Provider Using the My Downloads page

To add the Oracle WebCenter Content search provider to Internet Explorer using the My Downloads page in Oracle WebCenter Content Server:

1. Open Internet Explorer.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search provider for.
3. Open the **My Content Server** tray or menu.

4. Click **My Downloads**.

The My Downloads for *USER* page opens.

5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)

The Add Search Provider dialog opens.

6. Optionally, select the 'Make this my default search provider' check box.

7. Click **Add** to make the search provider available in the web browser ([Figure 13-1](#)).

Adding the Oracle WebCenter Content Search Provider From the Browser Search Box

To add the Oracle WebCenter Content search provider to Internet Explorer 8 using the browser search box:

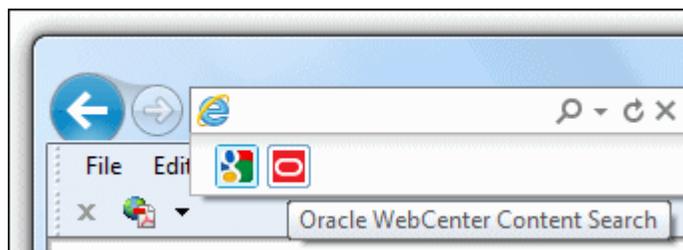
1. Open Internet Explorer.

2. Log in to the Oracle WebCenter Content Server instance you want to add the search provider for.

3. Click the arrow to the right of the search box in your browser. (This arrow acquires a colored glow, indicating that the website offers a search provider that can be installed in Internet Explorer.)

4. Point to **Add Search Providers** and click the search provider name for the content server to make the search provider available in the web browser. The default search provider name is 'Oracle WebCenter Content Search', but the server administrator may have changed this.

Figure 13-1 Oracle WebCenter Content Search Provider Added to Internet Explorer 9



13.2.2 Adding the Oracle WebCenter Content Search Engine in Firefox

You can add a search engine for an Oracle WebCenter Content Server instance in Firefox in either of two ways:

- Using the My Downloads page in the Oracle WebCenter Content Server web interface
- Using the search bar in Firefox

Adding the Oracle WebCenter Content Search Engine Using the My Downloads page

To add the Oracle WebCenter Content search engine to Firefox using the My Downloads page in Oracle WebCenter Content Server:

1. Open Firefox.

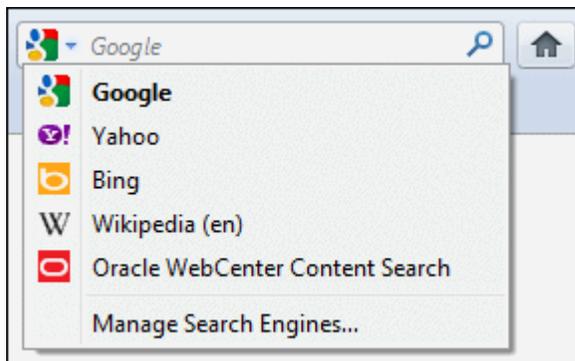
2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Open the **My Content Server** tray or menu.
4. Click **My Downloads**.
The My Downloads for *USER* page opens.
5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)
The Add Search Engine dialog opens.
6. Optionally, select the 'Start using it right away' check box.
7. Click **Add** to make the search engine available in the web browser (Figure 13–2).

Adding the Oracle WebCenter Content Search Engine From the Browser Search Box

To add the Oracle WebCenter Content search engine to Firefox using the browser search bar:

1. Open Firefox.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Click the arrow in the browser search bar to open the search engine list. (The search engine button acquires a colored glow, indicating that the website offers a search engine that can be installed in Firefox.)
4. Click **Add "Search_Engine"** to make the search engine available in the web browser (Figure 13–2). The default search engine name is 'Oracle WebCenter Content Search', but the server administrator may have changed this.

Figure 13–2 Oracle WebCenter Content Search Engine Added to Firefox



13.2.3 Adding the Oracle WebCenter Content Search Engine in Google Chrome

To add the Oracle WebCenter Content search engine to Google Chrome:

1. Open Google Chrome.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Open the **My Content Server** tray or menu.
4. Click **My Downloads**.

The My Downloads for *USER* page opens.

5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)
6. Depending on your Chrome version, the search engine for the current Oracle WebCenter Content Server instance is installed and enabled in the web browser immediately, or you can first modify the search engine name, keyword, or URL before installing it.

13.3 Setting a Keyword for the Oracle WebCenter Content Search Engine

You can speed up searches in your web browser by assigning keywords to a search provider. This allows you to search directly from the browser's address bar without having to select the search engine to use first. For example, if you set 'cs' as the keyword for an Oracle WebCenter Content search engine, then specifying "cs *Search_Term*" in the address bar of your web browser immediately performs the Quick Search query on the Oracle WebCenter Content Server associated with the keyword.

The procedure to set a keyword for the Oracle WebCenter Content search engine depends on the web browser:

- [Section 13.3.1, "Setting a Search Engine Keyword in Firefox"](#)
- [Section 13.3.2, "Setting a Search Engine Keyword in Google Chrome"](#)

13.3.1 Setting a Search Engine Keyword in Firefox

To set a keyword for the Oracle WebCenter Content search engine in Firefox:

1. Open Firefox.
2. Click the arrow in the browser search bar to open the search engine list.
3. Click **Manage Search Engines...**

The Manage Search Engine List dialog opens.

4. Select the Oracle WebCenter Content search engine and click **Edit Keyword...**

The Edit Keyword dialog opens.

5. Enter the keyword (for example, *cs*) and click **OK**.

Note: By default, no search engine keyword is associated with an Oracle WebCenter Content Server instance.

You can now use the defined keyword to perform a quick search on the associated Oracle WebCenter Content Server instance directly from the address bar.

13.3.2 Setting a Search Engine Keyword in Google Chrome

To set a keyword for the Oracle WebCenter Content search engine in Google Chrome:

1. Open Google Chrome.
2. Click the configuration icon (wrench) on the browser toolbar.
3. Click **Options**.
4. On the Basics page, click **Manage search engines...**

The Search Engines page opens.

5. Under **Other search engines**, select the Oracle WebCenter Content search engine and specify the keyword (for example, *cs*). You can also change the search engine name if you want.

Note: The default search engine keyword for an Oracle WebCenter Content Server instance is its main URL, for example `server1.example.com`.

6. Close the Search Engines page.

You can now use the defined keyword to perform a quick search on the associated Oracle WebCenter Content Server instance directly from the address bar.

13.4 Searching for Managed Content in Your Web Browser

You can use the web browser plug-in to search for managed content on Oracle WebCenter Content Server instances directly from your web browser.

The procedure to search for managed content depends on the web browser:

- [Section 13.4.1, "Searching for Managed Content in Internet Explorer"](#)
- [Section 13.4.2, "Searching for Managed Content in Firefox"](#)
- [Section 13.4.3, "Searching for Managed Content in Google Chrome"](#)

Note: See your web browser help for additional information about searching.

13.4.1 Searching for Managed Content in Internet Explorer

To search for content items on an Oracle WebCenter Content Server instance in Internet Explorer:

1. Open Internet Explorer.
2. Click the arrow to the right of the search box (Internet Explorer 8) or address bar (Internet Explorer 9), and select the Oracle WebCenter Content search engine.
3. Enter your search term and press Enter.
4. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

13.4.2 Searching for Managed Content in Firefox

To search for content items on an Oracle WebCenter Content Server instance in Firefox:

1. Open Firefox.
2. You can search for content from the search bar or using a keyword.

From the search bar:

- a. Click the arrow in the browser search bar and select the Oracle WebCenter Content search engine.
- b. Enter your search term in the search bar and press Enter.

Using a keyword:

- a. In the browser address bar, type the search engine keyword associated with the Oracle WebCenter Content Server instance you want to search followed by the search term, for example:

```
cs "sales report"
```

Note: By default, no search engine keyword is associated with an Oracle WebCenter Content Server instance. See [Section 13.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine"](#) for instructions on how to set one.

- b. Press Enter.
3. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

13.4.3 Searching for Managed Content in Google Chrome

To search for content items on an Oracle WebCenter Content Server instance in Google Chrome:

1. Open Google Chrome.
2. In the browser address bar, type the search engine keyword associated with the Oracle WebCenter Content Server instance you want to search followed by the search term, for example:

```
cs "sales report"
```

Note: The default search engine keyword for an Oracle WebCenter Content Server instance is its main URL, for example `server1.example.com`, but you can change it to something more meaningful. See [Section 13.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine."](#)

3. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

13.5 Removing the Oracle WebCenter Content Search Provider from Your Web Browser

The procedure to remove the Oracle WebCenter Content search provider depends on the web browser:

- [Section 13.5.1, "Removing the Oracle WebCenter Content Search Provider from Internet Explorer"](#)
- [Section 13.5.2, "Removing the Oracle WebCenter Content Search Engine from Firefox"](#)
- [Section 13.5.3, "Removing the Oracle WebCenter Content Search Engine from Google Chrome"](#)

13.5.1 Removing the Oracle WebCenter Content Search Provider from Internet Explorer

To remove the Oracle WebCenter Content search provider from Internet Explorer:

Internet Explorer 8

1. Open Internet Explorer.
2. Click the arrow to the right of the search box in your browser.
3. Click **Change Search Defaults...**

The Change Search Defaults dialog opens.

4. Select the search provider for the Oracle WebCenter Content Server instance ('Oracle WebCenter Content Search' by default) and click **Remove**.
5. Click **OK**.

Internet Explorer 9

1. Open Internet Explorer.
2. Open the Tools menu and choose **Internet options**.
3. On the General tab, click **Settings** in the **Search** section.
4. Select the search provider for the Oracle WebCenter Content Server instance and click **Remove**.
5. Click **Close**.

13.5.2 Removing the Oracle WebCenter Content Search Engine from Firefox

To remove the Oracle WebCenter Content search engine from Firefox:

1. Open Firefox.
2. Click the arrow in the browser search bar to open the search engine list.
3. Click **Manage Search Engines...**
4. Select the search engine for the Oracle WebCenter Content Server instance and click **Remove**.
5. Click **OK**.

13.5.3 Removing the Oracle WebCenter Content Search Engine from Google Chrome

To remove the Oracle WebCenter Content search engine from Google Chrome:

1. Open Google Chrome.
2. Click the configuration icon (wrench) on the browser toolbar.
3. Click **Options**.
4. On the Basics page, click **Manage search engines...**
The Search Engines page opens.
5. Select the search engine for the Oracle WebCenter Content Server instance and click the 'X' to the right to remove it.
6. Close the Search Engines page.

Part VI

Appendices

This part contains the following appendices:

- [Appendix A, "Advanced Client Configuration"](#)
- [Appendix B, "Uninstalling the Desktop Client Software"](#)

Advanced Client Configuration

This section covers these topics:

- [Section A.1, "Setting Windows Explorer Integration Options"](#)
- [Section A.2, "Changing the Location of the Local File Cache"](#)
- [Section A.3, "Disabling Overriding the Default Content Profile Selection"](#)
- [Section A.4, "Configuring and Disabling Pattern-based File Naming for Email Check-ins"](#)

Important: This section deals with advanced configuration on your computer. Make sure that you consult with your system administrator to verify you are allowed to perform the tasks in this section.

Note: For administrative Desktop tasks, see *Managing Oracle WebCenter Content*.

A.1 Setting Windows Explorer Integration Options

Desktop offers a number of advanced configuration options that enable you to fine-tune the way it works with Windows Explorer on your computer. To see the advanced options dialog, do the following:

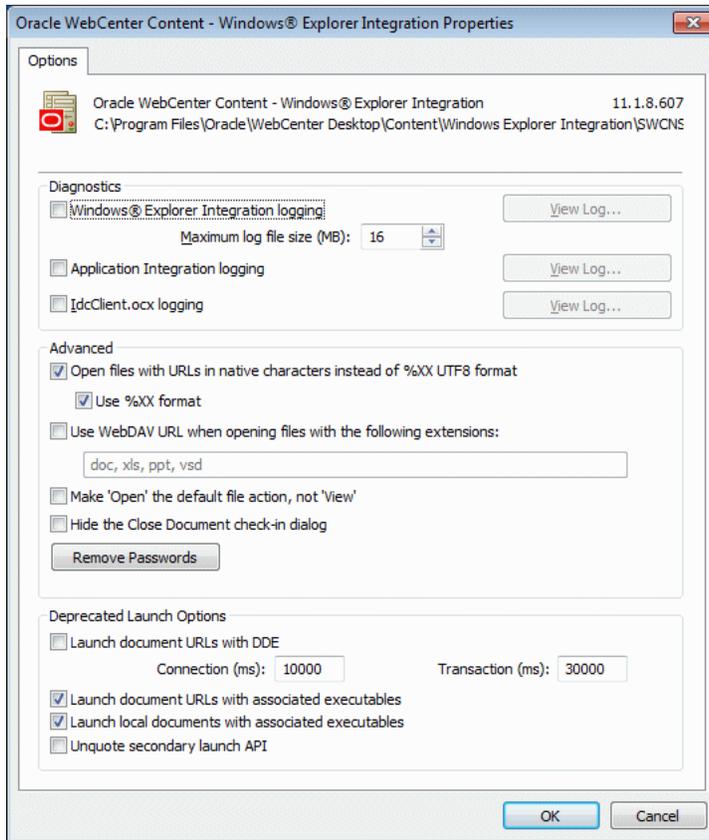
- **Windows 7 and Windows Vista:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list (not in your favorites list!) while simultaneously holding the Shift and Ctrl keys.

Note: Make sure all folders are shown in Windows Explorer (which is not the default): click **Tools**, then **Folder Options**, then **General**, and then **Show all folders**.

- **Windows XP:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list while simultaneously holding the Shift and Ctrl keys. Alternatively, Shift+Ctrl+right-click the **WebCenter Content Servers** icon on the Windows desktop.

The context menu now includes an option called **Properties....** Choose this option to open the Windows Explorer Integration Properties dialog ([Figure A-1](#)).

Figure A-1 Windows Explorer Integration Properties Dialog



Important: Modify these settings only if you know what you are doing or if specifically instructed to do so, for example by an Oracle support engineer. Changing these settings may break your Desktop client installation!

Note: Your system administrator may have set up your computer to prevent you from making any changes to the configuration settings in this dialog. If that is the case, you can change a setting, but the changes will not "stick" after you click OK.

Element	Description
Windows Explorer Integration logging	Select this check box if you want errors that occur during software execution to be written to a log file. This may be useful for troubleshooting and diagnostic purposes. The log file is called WebDAVClient.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable).
Maximum log file size (MB)	Specify the maximum file size that the Windows Explorer integration log file is allowed to have (in megabytes). Once the log file exceeds this size limit, it is deleted and a new log file is started.

Element	Description
Application Integration logging	Select this check box if you want normal Desktop operations, such as program calls and the like, to be written to a log file. This can be useful for troubleshooting and diagnostic purposes. The log file is called DIS_Log.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable). There is no size limit to this log file other than any dictated by the file system.
IdcClient.ocx logging	Select this check box if you want the IdcClient operations to be written to a log file. This can be useful for troubleshooting and diagnostic purposes. The IdcClient handles communications with content servers. The log file is called IdcClient.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable). There is no size limit to this log file other than any dictated by the file system.
View Log...	Click any of these buttons to view their associated log file.
Open files with URLs in native characters instead of %XX UTF8 format	Select this check box if you want URLs to be encoded in the operating system's native encoding (for example, Big-5) rather than Unicode.
Use %XX format	Select this check box to encode all URL bytes in the %XX escaped format, except for the following characters: a-z A-Z 0-9 ! # \$ & ' () + - . ; = _.
Use WebDAV URL when opening files with the following extensions	Select this check box if you want files with the specified file extensions to be opened via WebDAV rather than downloading them and then opening them from the offline cache. In other words, the WebDAV URL is provided to the application, so that it acts as a WebDAV client. Use commas to separate the file extensions.
Make 'Open' the default file action, not 'View'	Select this check box if you want a content file on a server to be opened rather than viewed when you select it in the integration hierarchy in Windows Explorer and press Enter or double-click it. Please note that local copies of managed documents always open in full edit mode regardless of this setting. For a comparison of the 'view' and 'open' actions, see Section 4.7, "Content Management Actions on Files."
Hide the Close Document check-in dialog	Select this check box if you do not want to see the special close dialog for managed documents in Microsoft Office applications (see Section 9.4, "Close Dialog"). Instead, managed documents are saved in much the same way as unmanaged Office documents ("Do you want to save the changes?").
Remove Passwords	Click this button to remove the cached passwords for all content server connections on your computer. This forces a login prompt the next time you connect to a server, which may be useful if the incorrect login credentials were inadvertently cached for a content server.
Launch document URLs with DDE	Select this check box to attempt to open URLs using a DDE transaction instead of a ShellExecute API call. The connection and transaction are timeout values (in milliseconds) that help to ascertain if the DDE conversation has succeeded.
Launch document URLs with associated executables	Select this check box to issue a call to ShellExecute using the document's associated executable as the exe and the URL as the document argument. (This is done for URLs.)

Element	Description
Launch local documents with associated executables	Select this check box to issue a call to ShellExecute using the document's associated executable as the exe and the file path as the document argument. (This is done for files on the file system; that is, those that are checked out and cached locally on the disk.)
Unquote secondary launch API	Select this check box to call ShellExecute without the document path surrounded by quotes.
OK	Click this button to close this dialog and submit any changes you made.
Cancel	Click this button to close this dialog and cancel any changes you made.

A.2 Changing the Location of the Local File Cache

Desktop uses temporary storage cache on the file system of client computers. For more information, see [Section 4.6, "Local Caching of Content Files."](#) By default, this storage cache is located in the following directory:

- **Windows XP:** C:\Documents and Settings\USER\Application Data\Stellent\SyndicationCache
- **Windows Vista and Windows 7:** C:\Users\USER\AppData\Roaming\Stellent\SyndicationCache

However, this may not comply with your organization's standards for where data should be stored on client computers. To accommodate for this, you can use the following Windows Registry keys to modify the location of the temporary storage cache on a client computer (the paths below are examples):

Important: Check with your system administrator whether you are allowed to make changes to the Windows registry. Also, changing the registry, if done incorrectly, may affect the stability of your computer. Do not edit the Windows registry unless you are confident about doing so.

```
[HKEY_CURRENT_USER\Software\Oracle\WebCenter Desktop\Content\WebDAV]
"Syndication Dir"="H:\Application Data\SyndicationCache"
```

Please note the following:

- The AppData structure in Windows Vista and Windows 7 is hidden by default. You must enable the option to view hidden folders in Windows Explorer.
- This registry value is not included by default; you must add it manually.
- The registry value is a string value.
- Any files already in the offline cache are not automatically moved from the old to the new location. It is therefore recommended that you empty your offline cache before changing its location.
- The offline cache location has subdirectories for each defined server connections.
- Make sure that you restart your computer (or log off and log back on) after modifying this setting.

- When entering the path in Registry Editor, use single backslashes (\) to separate directories in the path. However, if you export the registry branch to a file, the value will contain double backslashes (\\).
- Setting this registry key affects the offline cache location for *all* defined server connections. You cannot change the cache location setting for individual content servers. However, the settings are user-specific, so if there are multiple user accounts on the computer, the settings apply to the current user only.
- Your system administrator may have disabled the ability to make changes to the Desktop configuration settings on your computer.

A.3 Disabling Overriding the Default Content Profile Selection

If you are prompted to provide metadata when dragging and dropping or copying and pasting a new file into a folder that has a default content profile assigned to it, you can normally change that profile in the content check-in dialog.

You can use the following Windows Registry key to disable the ability to override the default content profile selection:

```
[HKEY_CURRENT_USER\Software\Oracle\WebCenter Desktop\Content]
"Metadata Prompts Allow Any Profile"=dword:00000000
```

Important: Check with your system administrator whether you are allowed to make changes to the Windows registry. Also, changing the registry, if done incorrectly, may affect the stability of your computer. Do not edit the Windows registry unless you are confident about doing so.

Please note the following:

- This registry value is not included by default; you must add it manually.
- The registry value is a dword value.
- Setting the value to '0' prevents you from changing the default content profile selection in the content check-in dialog. The default value is '1'.
- If you are using 32-bit Microsoft Office on 64-bit Windows, you do not need to use Wow6432Node.
- Your system administrator may have disabled the ability to make changes to the Desktop configuration settings on your computer.

A.4 Configuring and Disabling Pattern-based File Naming for Email Check-ins

By default, pattern-based file naming is enabled when checking in email files. The default is to use the subject line and date received as the file name, in the form <\$xEmailSubject\$>-<\$xReceivedDate\$>.msg. For example:

```
Re Sales figures for 2012-05152013 153025.msg
```

You can use the following Windows Registry key to configure or disable pattern-based file naming:

```
[HKEY_CURRENT_USER\Software\Oracle\WebCenter Desktop\Content]
"MSG File Name Pattern"="null/token"
```

To disable pattern-based filenaming, use the null value:

```
"MSG File Name Pattern"=""
```

To configure pattern-based file naming, use one or more of the following tokens:

- <\$xEmailSubject\$>
- <\$xEmailFrom\$>
- <\$xEmailTo\$>
- <\$xEmailCC\$>
- <\$xPublicationDate\$>
- <\$xReceivedDate\$>
- <\$xEmailId\$>

For example:

```
[HKEY_CURRENT_USER\Software\Oracle\WebCenter Desktop\Content]
"MSG File Name Pattern"="<$xEmailSubject$>-<$xEmailFrom$>-<$xPublicationDate$>"
```

An example of how this would appear:

```
Re Sales figures for 2012-John Doe-06252013 091159.msg
```

Important: Check with your system administrator whether you are allowed to make changes to the Windows registry. Also, changing the registry, if done incorrectly, may affect the stability of your computer. Do not edit the Windows registry unless you are confident about doing so.

Please note the following:

- These settings apply only to Microsoft Outlook message files. Lotus Notes message files are not subject to pattern-based file naming.
- This registry value is not included by default; you must add it manually if you want to disable or configure pattern-based file naming.
- The email metadata component of Desktop may have been set up to override pattern-based file naming, in which case these registry settings will have no effect.
- The date based tokens will be resolved into MMDDYYYY HHMMSS (for example, 4/23/2013 5:18:52 PM becomes 04232013 171852) and the date is based on UTC. If the message header value cannot be retrieved then the token will resolve to no value.
- If pattern-based file naming is disabled, generated file names are based on the subject line, the internet message ID, or the GUID, as available and appropriate. Examples of each of these are:

```
Re Sales figures for 2012.msg
```

```
0E906834E170104899F28A9E1F4642029BA485@jdoe1.example.com.msg
```

```
963533CA-F448-466F-97F9-525FB2AA43B8.msg
```

- These settings apply to all servers accessed through the Desktop instance to which the registry key applies.

- Your system administrator may have disabled the ability to make changes to the Desktop configuration settings on your computer.

Uninstalling the Desktop Client Software

This section covers these topics:

- [Section B.1, "Uninstalling the Desktop Client Software Completely"](#)
- [Section B.2, "Uninstalling Individual Desktop Components"](#)

B.1 Uninstalling the Desktop Client Software Completely

To completely uninstall the Desktop client software:

1. Open Windows Control Panel.
2. Click the following link, depending on your operating system:
 - Windows XP: **Add or Remove Programs**
 - Windows Vista and Windows 7 (category view): **Uninstall a program** (under Programs)
 - Windows Vista and Windows 7 (icon view): **Programs and Features**
3. Select **Oracle WebCenter Content Desktop**.
4. Do the following, depending on your operating system:
 - Windows XP: Click **Remove**.
 - Windows Vista and Windows 7: Right-click and choose **Change** (or **Uninstall**).

The Desktop install/uninstall wizard is launched.

5. Complete the wizard, selecting the **Remove** or **Uninstall** options.

Click **Yes** when asked if you are sure that you want to remove the Desktop client software from your computer.

The software is removed from the client computer.

6. Restart your computer.

Considerations

Please note the following:

- If you reinstall the Desktop client software (for example, during an upgrade), any server connections that you set up earlier will continue to be available after reinstalling the software.
- Uninstalling the Desktop client software from your computer will not remove any Oracle WebCenter Content search providers from your web browsers.

B.2 Uninstalling Individual Desktop Components

To uninstall individual Desktop components:

1. Open Windows Control Panel.
2. Click the following link, depending on your operating system:
 - Windows XP: **Add or Remove Programs**
 - Windows Vista and Windows 7 (category view): **Uninstall a program** (under Programs)
 - Windows Vista and Windows 7 (icon view): **Programs and Features**
3. Select **Oracle WebCenter Content: Desktop**.
4. Click **Change** to start the Desktop install wizard.
5. Go through the installation procedure (see [Section 1.6.4, "Installing the Latest Version of the Desktop Client Software"](#)) and unselect the application(s) that you no longer want to integrate with Content Server.
6. Restart your computer.

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