Oracle® Fusion Middleware

User's Guide for Desktop Integration Suite

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Oracle Fusion Middleware User's Guide for Desktop Integration Suite, 11*g* Release 1 (11.1.1)

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Preface

Desktop Integration Suite (DIS) provides convenient access to the files on a number of content repositories (including Oracle Content Server and Oracle Content Database) from a number of familiar desktop applications, such as Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), and e-mail clients (Microsoft Outlook and Lotus Notes).

Audience

This document is intended for end users who are using the Desktop Integration Suite 11*g*R1 client software on their computers.

Documentation Accessibility

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Related Documents

For more information on using Oracle Enterprise Content Management Suite, see the following documents:

- *Oracle Fusion Middleware User's Guide for Content Server*
- *Oracle Fusion Middleware User's Guide for Universal Records Management*
- *Oracle Fusion Middleware User's Guide for Oracle Information Rights Management Desktop*
- *Oracle Fusion Middleware User's Guide for Imaging and Process Management*
- *Oracle Fusion Middleware User's Guide for Oracle Enterprise Content Management Solutions for Oracle E-Business Suite*
- *Oracle Fusion Middleware User's Guide for Oracle Enterprise Content Management Solutions for Oracle PeopleSoft*
- *Oracle Fusion Middleware User's Guide for Oracle Enterprise Content Management Solutions for Oracle Siebel*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 Introduction

This section covers these topics:

- "About Desktop Integration Suite" on page 1-1
- "What's New" on page 1-1
- "Supported Content Servers" on page 1-3
- "Supported E-mail Backend Systems" on page 1-4
- "Supported Client Applications" on page 1-4
- "Accessibility Features" on page 1-5

1.1 About Desktop Integration Suite

Desktop Integration Suite (DIS) provides a set of embedded applications that help you seamlessly integrate your desktop experience with Oracle Content Server, Oracle Content Database (Content DB), 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), and supported e-mail clients (Microsoft Outlook and Lotus Notes).

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

Note: Desktop Integration Suite can work with all content files on Oracle Content Server instances, including records (as managed by Oracle Universal Records Management, or Oracle URM) and sealed documents (as managed by Oracle Information Rights Management, or Oracle IRM).

1.2 What's New

Desktop Integration Suite 11*g*R1 is a major new release that offers many new features and enhancements compared to version 10*g*R3.

Note: Some of these features may not be available on all servers, depending on their server type, software version, and system configuration.

Integration With Oracle Content Server 11*g*R1

Desktop Integration Suite 11*g*R1 fully supports Oracle Content Server 11*g*R1. The client software can communicate with Oracle Content Server 11*g*R1, 10*g*R3, and 7.5.2 (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).

Please note that not all features of Desktop Integration Suite 11*g*R1 may be available when you are connecting to a pre-11*g* Oracle Content Server instance.

Integration With Oracle Content Database Servers

Desktop Integration Suite 11*g*R1 can communicate with Oracle Content Database (Content DB) servers. The client software can communicate with Oracle Content DB 10*g*R1 (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 11*g*R1 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 11*g*R1 provides integration with Windows Explorer in Microsoft Windows 7 (32-bit only).

No more ODMA for Microsoft Office Integration

Desktop Integration Suite 11*g*R1 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 11*g*R1 supports selection of Oracle Content Server profiles on search and check-in pages. Content profiles allow content server administrators to set default metadata for files depending on their application type and to control what metadata fields are shown on the page. Please note that this feature is available only if you are connecting to an Oracle Content Server 11*g* instance, not earlier versions.

Oracle Content Server Productivity Nodes

Desktop Integration Suite 11*g*R1 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 e-mail applications (Microsoft Outlook and Lotus Notes). Please note that this feature is available only if you are connecting to an Oracle Content Server 11*g*R1 instance, not earlier versions. See Chapter 6, "Understanding the Integration Hierarchy" for more information.

Metadata Prompts for New Files in Contribution Folders

Desktop Integration Suite 11*g*R1 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. Please note that this feature is available only if you are connecting to an Oracle Content Server 11*g*R1 instance, not earlier versions. See "Copying Content Folders and Files" on page 8-29 for more information.

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

Desktop Integration Suite 11*g*R1 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). See Chapter 10, "Inserting Managed Content Into Microsoft Office Files" for more information.

User Interface for Comparing Word Documents on Content Server

Desktop Integration Suite 11*g*R1 now provides a user interface in Microsoft Word (menu items, 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 Chapter 11, "Comparing Managed Microsoft Word Documents" for more information.

Expanded Localization

The client software for Desktop Integration Suite 11*g*R1 has been localized into more languages than previous releases (see "Localized User Interface" on page 1-5).

Improved User Assistance

The user documentation and online help for Desktop Integration Suite 11*g*R1 have been completely rewritten and have significantly been expanded.

1.3 Supported Content Servers

The client software of Desktop Integration Suite 11*g*R1 can connect to the following content servers:

- **Oracle Content Server 11*g*R1, 10*g*R3, and 7.5.2**

  For the Desktop Integration Suite client software to be able to work with content on Oracle Content Server instances, the DesktopIntegrationSuite component must be installed and enabled on the server.

  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).

For the Desktop Integration Suite client to be able to interact with an Oracle Content Server instance, that server must have the DesktopIntegrationSuite component installed and enabled. Also, content folders are available only if the folders component is installed and enabled on the content server.

Please note that not all features of Desktop Integration Suite 11*g*R1 may be available when you are connecting to a pre-11*g* Oracle Content Server instance.

- **Oracle Content Database 10*g*R1 (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).

- **Other content repositories that support the standard WebDAV protocol**

  Integration with WebDAV servers 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). Please note that the WebDAV DeltaV extension is not supported.

Note: See Chapter 7, "Working With Content Server Connections" for more information on connecting to content servers.

1.4 Supported E-mail Backend Systems

The client software of Desktop Integration Suite 11*g*R1 can work with the following e-mail backend systems:

- Microsoft Exchange 2000 through 2007
- Lotus Domino 6 through 8 (with mail databases based on release 6 or 7 mail templates; release 8 mail templates are currently not supported)

1.5 Supported Client Applications

The client software of Desktop Integration Suite 11*g*R1 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 version only)

Note: The 64-bit versions of Windows XP and Vista use the 32-bit version of Windows Explorer for Desktop Integration Suite.

Desktop Applications

- Microsoft Word 2002 (XP) through 2007
- Microsoft PowerPoint 2002 (XP) through 2007

- Microsoft Excel 2002 (XP) through 2007

> **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.

E-Mail Client Applications

- Microsoft Outlook 2002 (XP) through 2007
- Lotus Notes Email Client 6.5.2 through 8.5 (with Lotus Domino mail databases based on release 6 or 7 mail templates; release 8 mail templates are currently not supported)

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

See Chapter 2, "Setting Up Desktop Integration on Client Computers" for more information on setting up client computers for use with Desktop Integration Suite.

1.6 Localized User Interface

Desktop Integration Suite 11*g*R1 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 Integration Suite user interface will also be German.

1.7 Accessibility Features

Desktop Integration Suite 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 Integration Suite 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 Integration Suite client software provides context menus to provide options that are relevant to the current context of the application. For example, with a contribution 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.

See "Context Menus" on page 6-12 for more information.

Standard Windows Keyboard Shortcuts

The Desktop Integration Suite 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

2

Setting Up Desktop Integration on Client Computers

This section explains the process of setting up Desktop Integration Suite 11*g*R1 on client computers running the Microsoft Windows operating system. It covers these topics:

- "Installation Requirements" on page 2-1
- "Installation Considerations" on page 2-2
- "Installation Process" on page 2-2
- "Uninstalling a Previous Version of Desktop Integration Suite" on page 2-2
- "Installing the Latest Version of Desktop Integration Suite" on page 2-3
- "Manually Configuring the Notes.ini File" on page 2-5
- "Setting Up Content Server Connections" on page 2-5

2.1 Installation Requirements

Client computers running Desktop Integration Suite 11*g*R1 must meet the following requirements:

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

  Note: The 64-bit versions of Windows XP and Vista use the 32-bit version of Windows Explorer for Desktop Integration Suite.

- Microsoft Internet Explorer 7.0 or higher (please note that Internet Explorer does not have to be the default browser)
- Microsoft .NET Framework Version 2.0 Redistributable Package. If this is not installed, you can download it from the Microsoft Web site: `http://msdn.microsoft.com/en-us/netframework/aa731542.aspx`.

2.2 Installation Considerations

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

- Your system administrator may set up the required Desktop Integration Suite 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 Integration Suite client software installer.
- The Desktop Integration Suite client software can communicate with Oracle Content Server 11*g*R1, 10*g*R3, and 7.5.2. Other Content Server versions are not supported. Please note that not all features of Desktop Integration Suite 11*g*R1 may be available if you are connecting to an Oracle Content Server version prior to 11*g*R1 (see "What's New" on page 1-1).
- The Desktop Integration Suite client software can communicate with Oracle Content Database (Content DB) 10*g*R1 (10.2).
- The Desktop Integration Suite 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.

2.3 Installation Process

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

1. Uninstalling a Previous Version of Desktop Integration Suite
2. Installing the Latest Version of Desktop Integration Suite
3. Manually Configuring the Notes.ini File (if required)
4. Setting Up Content Server Connections

2.4 Uninstalling a Previous Version of Desktop Integration Suite

If a previous version of the Desktop Integration Suite client software is already on your computer, it is strongly recommended that you uninstall it first. It is important that you completely uninstall everything previously installed.

Perform these steps to completely uninstall the Desktop Integration Suite 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 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 Desktop Integration Suite uninstall wizard is launched.

5. Click **Yes** when asked if you are sure that you want to remove the Desktop Integration Suite software from your computer.

   The software is removed from the client computer.

> **Important:** If you are running the WebDAV Client, you must uninstall it using the WebDAV Client uninstaller.

> **Note:** If you uninstall and then reinstall the Desktop Integration Suite software (for example, during an upgrade), all server connections that you set up earlier will continue to be available after reinstalling the software.

2.5 Installing the Latest Version of Desktop Integration Suite

If there are no previous versions of the Desktop Integration Suite client software on your computer, you can install the current version of the Desktop Integration Suite 11*g*R1 client software.

Perform these steps to install the Desktop Integration Suite 11*g*R1 client software:

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

   If you have access to an Oracle Content Server 11*g*R1 instance, you can find the Desktop Integration Suite client installer on the **My Downloads** page in the content server web interface (under **My Content**).

2. After obtaining the client software, run the installer executable.

   The installation wizard is launched.

3. If the installer does not detect the Microsoft .NET Framework Version 2.0 Redistributable Package on your computer, you are prompted to load it. Click **Yes**, accept the license agreement, perform the installation, and click **Finish**.

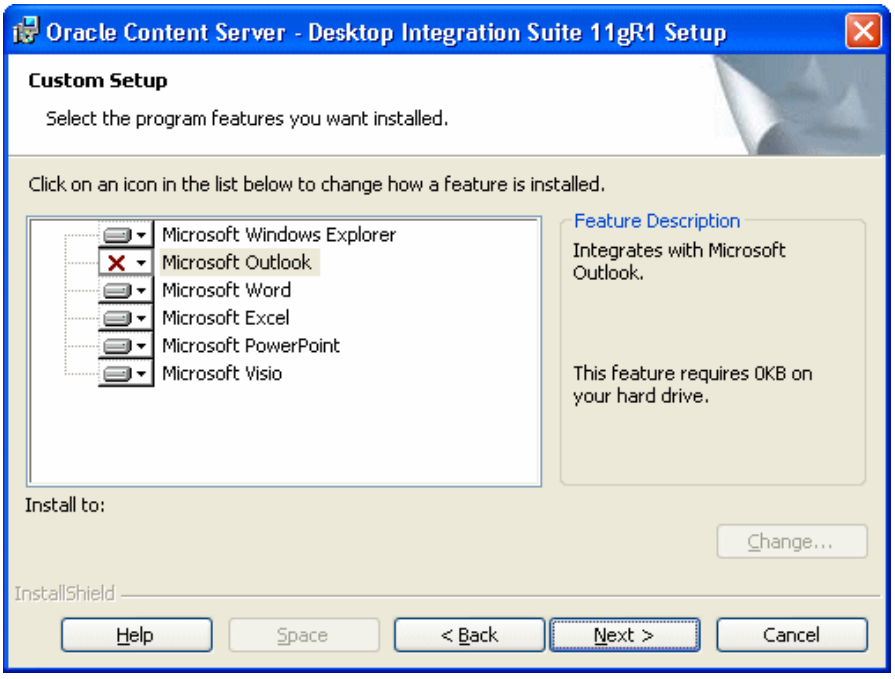
> **Note:** If the link from the installer does not work and you get a download error message, copy and paste the link to your web browser and download it from there.

4. On the Welcome screen, click **Next** to start the installation.

5. In the Custom Setup dialog, select the supported application(s) you want to integrate with Content Server.

   The list includes all supported applications that were detected on your local computer (see "Supported Client Applications" on page 1-4). All applications are selected for integration by default. If you do not want to integrate an application with Content Server, 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 2–1 Selection of Applications to Integrate With Content Server



Note: If no Outlook accounts have not defined yet, no integration will be set up in Outlook, even if it was selected in the application selection dialog.

By default, the software is installed to C:\Program Files\Oracle\Content Server\Desktop Integration Suite. 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.

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

7. 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 "Manually Configuring the Notes.ini File" on page 2-5

8. After the installation has been completed, click **Finish** to exit the installation wizard.

2.6 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 Integration Suite 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.

Perform these steps 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
     ```

   (Please note that 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.

2.7 Setting Up Content Server Connections

After installing the Desktop Integration Suite client software on your computer, you must set up connections to all content servers that you want to access from your computer. See Chapter 7, "Working With Content Server Connections" for more information.

3

Integration Into Windows Explorer

This section covers these topics:

- "About Windows Explorer Integration" on page 3-1
- "Accessing Desktop Integration in Windows Explorer" on page 3-1
- "Oracle Content Servers Hierarchy in Folders List" on page 3-2
- "Content Pane and Preview Pane" on page 3-3
- "Content Pane View Modes" on page 3-5
- "Buttons in Standard Buttons Toolbar" on page 3-6

3.1 About Windows Explorer Integration

The integration of 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 as a file system in Windows Explorer.

After you install the Desktop Integration Suite client software on your computer, the folders hierarchy in Windows Explorer includes a top-level node called "Oracle 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 Content Server administrative functions through the desktop integration interface. All administrative functions for Desktop Integration Suite are performed through the Oracle Content Server web browser interface.

3.2 Accessing Desktop Integration in Windows Explorer

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

- Double-click the Oracle Content Servers icon on your Windows desktop (Figure 3–1).
- Navigate to the top-level Oracle Content Server node in the Windows Explorer folders list (Figure 3–2).

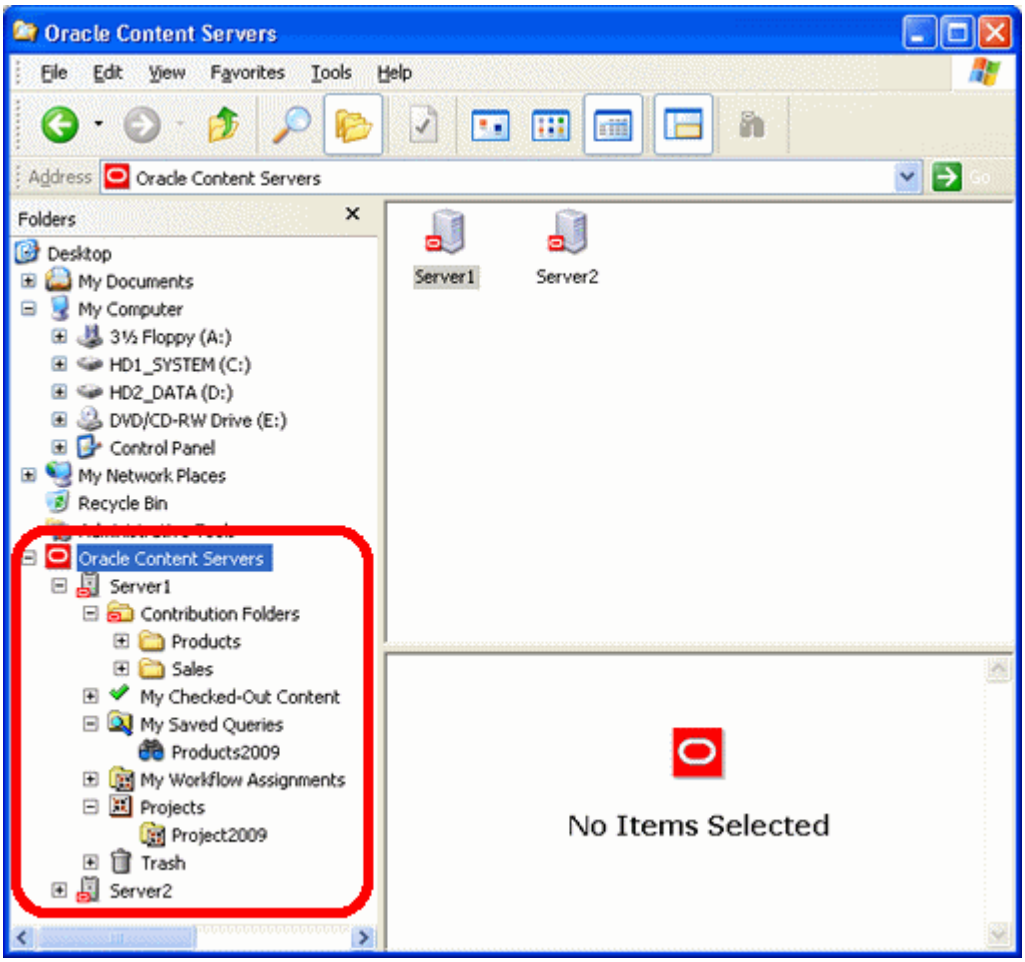
- Double-click a shortcut to a particular content server, contribution folder, or content item.

Figure 3–1 Oracle Content Servers Icon on Windows Desktop

3.3 Oracle Content Servers Hierarchy in Folders List

The Desktop Integration Suite software adds a hierarchical folder structure called **Oracle Content Servers** to the folders list in Windows Explorer (Figure 3–2). See Chapter 6, "Understanding the Integration Hierarchy" for more information on this integration hierarchy in Windows Explorer.

Figure 3–2 Integration Hierarchy in Windows Explorer on Windows XP



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 (see "Context Menus" on page 6-12), 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 contribution 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. See Chapter 8, "Working With Content Folders and Files" for more information.

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.

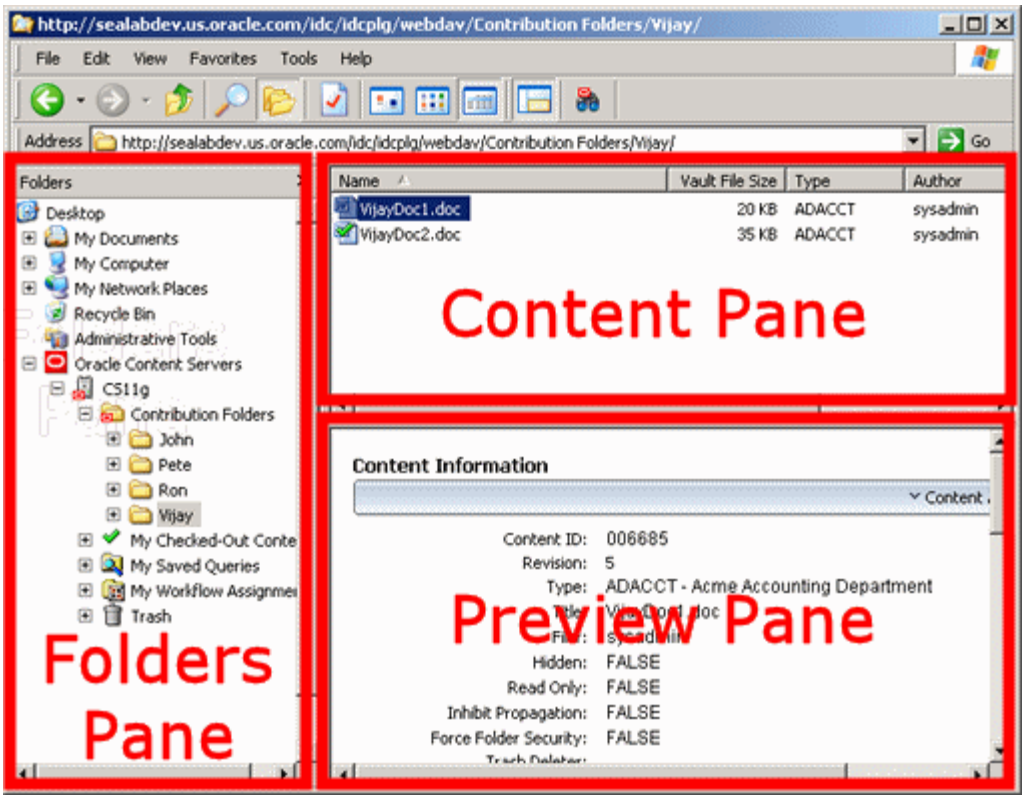
3.4 Content Pane and Preview Pane

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 Oracle Content Servers hierarchy in the folders 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 folder. You may also see a preview pane, which shows additional information about the selected item in the content pane (for example, the content information page for a file on the content server).

If you do not see the preview pane, you may enable it. See "Showing or Hiding the Preview Pane" on page 6-17 for details.

Figure 3–3 Content Pane and Preview Pane in Windows Explorer



Content Management Status

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 3–4. See "Content File Status" on page 8-9 for a full explanation of all content management status icons.

Figure 3–4 Status Icon Overlaid on Top of Microsoft Word Application Icon

Also, 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 3–5. 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 3–5 Screen Tip Showing Content Management Information About File

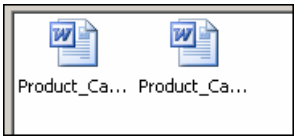
3.5 Content Pane View Modes

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 server folder). How the items are displayed depends on the view mode: icons view, list view, or details view.

Icons View

Icons view displays your files and folders as large application icons with their names shown below the icons. The files are always sorted by their file name.

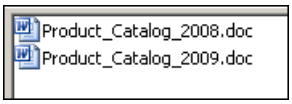
Figure 3–6 Icons View



List View

List view displays your files and folders as a list of file or folder names preceded by small application icons. The files are always sorted by their file name.

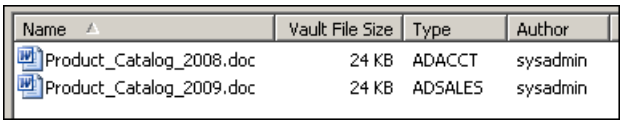
Figure 3–7 List View



Details View

Details view displays your files and folders as in list view, but with additional information such as file type, size, author, security group, timestamp, and the like (if available and relevant). You can sort the files by clicking on any column heading. Click again to reverse the sort order (from ascending to descending, or vice versa). You can define the columns that you want displayed and set their default width (see "Setting the Column Display" on page 6-17).

Figure 3–8 Details View



> **Note:** In addition to the associated application, the file icons may also show the content management status of the file. See "Content File Status" on page 8-9 for more information.

Changing the View Mode

You can change the view mode in the content pane in a number of ways:

- In the **View** menu, choose **Icons**, **List** or **Details**.
- Move the mouse cursor to any unused area of the content pane, right-click, choose **View** and then **Icons**, **List**, or **Details**.

- With your current position anywhere in the Oracle Content Server integration hierarchy, click any of the view mode buttons in the toolbar (see below).

3.6 Buttons in Standard Buttons Toolbar

The Desktop Integration Suite 11*g*R1 client software adds some buttons to the Standard Buttons toolbar in Windows Explorer. Please note that these buttons are visible only if you are in the Oracle Content Servers hierarchy.

Figure 3–9 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. See "Server Properties Dialog" on page A-8, "Folder Properties Dialog" on page A-13, and "Content Item Properties Dialog" on page A-39 for more information.
	Click this button to display the items in the content pane in icons view. See "Content Pane View Modes" on page 3-5 for more information.
	Click this button to display the items in the content pane in list view. See "Content Pane View Modes" on page 3-5 for more information.
	Click this button to display the items in the content pane in details view. See "Content Pane View Modes" on page 3-5 for more information.
	Click this button to show or hide the preview pane of Desktop Integration Suite. See "Content Pane and Preview Pane" on page 3-3 for more information.
	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. See "Content Query Capture Dialog" on page A-41 for more information. Please note that this button is available only for Oracle Content Server instances, not for other WebDAV servers (including Oracle Content DB).

4

Integration Into Microsoft Office Applications

This section covers these topics:

- "About Microsoft Office Integration" on page 4-1
- "Integration Into Microsoft Office 2002 (XP) and 2003" on page 4-1
- "Integration Into Microsoft Office 2007" on page 4-3
- "Close Dialog" on page 4-4
- "Microsoft Office Document Properties" on page 4-5

4.1 About Microsoft Office Integration

After installing the Desktop Integration Suite 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 Office applications and for all content servers (depending on their server type and version).

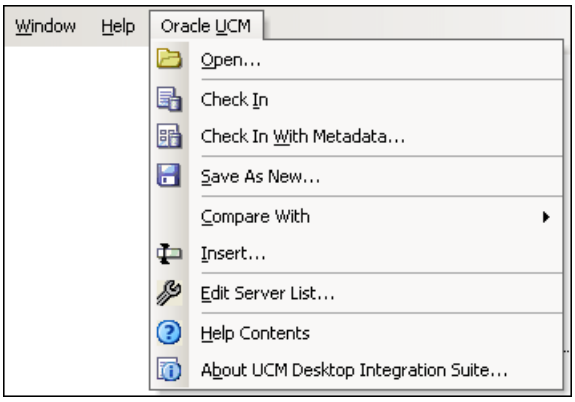
The following Microsoft Office applications are supported:

- Microsoft Word 2002 (XP) through 2007
- Microsoft PowerPoint 2002 (XP) through 2007
- Microsoft Excel 2002 (XP) through 2007

4.2 Integration Into Microsoft Office 2002 (XP) and 2003

The Desktop Integration Suite client software adds a menu called **Oracle UCM** (Oracle Universal Content Management) to the main Office 2002 (XP) and 2003 application menu bar.

Figure 4–1 Oracle UCM Menu in Microsoft Word 2003



The Oracle UCM 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. See "Select Content Dialog" on page A-17 for more information.
- **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.)
- **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.) See "Check In Content Dialog (Check In With Metadata)" on page A-27 for more information.
- **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. See "Save Dialog (Save As New)" on page A-23 for more information.
- **Compare With:** This option is available only in Microsoft Word. It enables you to compare the current Word document with another document:
  - **Earlier Revision:** This option enables you to compare the current Word document with an earlier 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.) See "Choose Content Item Revision Dialog" on page A-48 for more information.
  - **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. See "Select Content Dialog" on page A-17 for more information.

  See Chapter 11, "Comparing Managed Microsoft Word Documents" for more information on the document comparison feature.
- **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. See "Insert Content Item Dialog" on page A-42 and

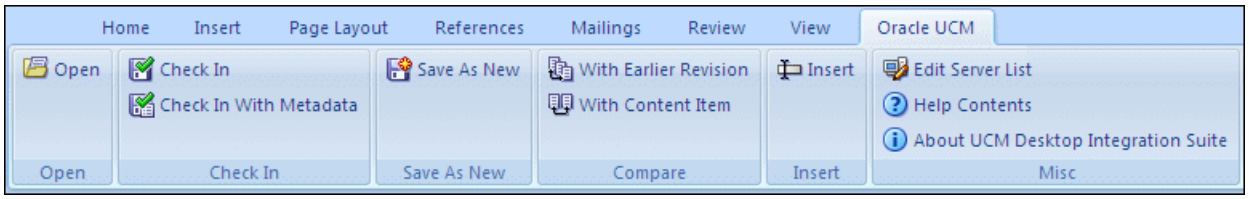
Chapter 10, "Inserting Managed Content Into Microsoft Office Files" for more information.

- **Edit Server List...:** This option opens a dialog where you can add, view, and delete server connections. See "Edit Server List Dialog" on page A-9 for more information.
- **Help Contents:** This option launches the online help for Desktop Integration Suite in your standard web browser.
- **About UCM Desktop Integration Suite...:** This option opens a dialog that provides version information about the Desktop Integration Suite client software.

4.3 Integration Into Microsoft Office 2007

The Desktop Integration Suite client software adds a ribbon called **Oracle UCM** (Oracle Universal Content Management) to the Office 2007 application interface.

Figure 4–2 Oracle UCM Ribbon in Microsoft Word 2007



The Oracle UCM ribbon includes the following panels:

- **Open:** This ribbon panel 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. See "Select Content Dialog" on page A-17 for more information.
- **Check In:** This ribbon panel 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.)
  - **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.) See "Check In Content Dialog (Check In With Metadata)" on page A-27 for more information.
- **Save As New:** This ribbon panel 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. See "Save Dialog (Save As New)" on page A-23 for more information.
- **Compare:** This ribbon panel is available only in Microsoft Word. It contains the following options:
  - **With Earlier Revision:** This option enables you to compare the current Word document with an earlier 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.) See "Choose Content Item Revision Dialog" on page A-48 for more information.

- **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. See "Select Content Dialog" on page A-17 for more information.

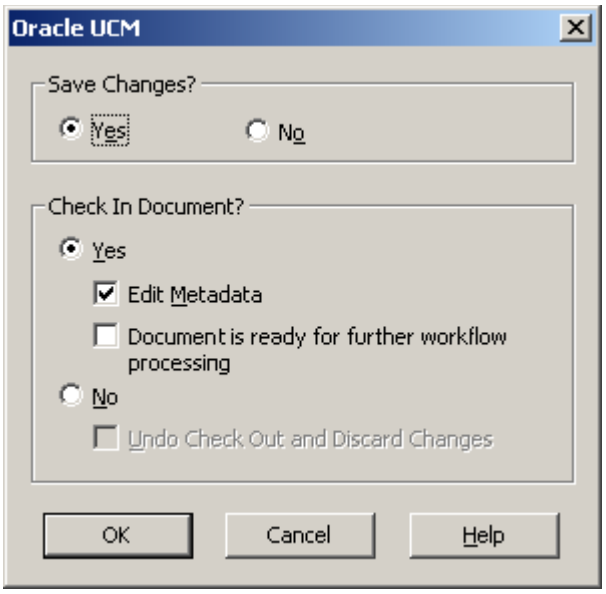
See Chapter 11, "Comparing Managed Microsoft Word Documents" for more information on the document comparison feature.

- **Insert:** This ribbon panel contains the following option:
  - **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. See "Insert Content Item Dialog" on page A-42 and Chapter 10, "Inserting Managed Content Into Microsoft Office Files" for more information.
- **Misc:** This ribbon panel contains the following options:
  - **Edit Server List:** This option opens a dialog where you can add, view, and delete server connections. See "Edit Server List Dialog" on page A-9 for more information.
  - **Help Contents:** This option launches the online help for Desktop Integration Suite in your standard web browser.
  - **About UCM Desktop Integration Suite:** This option opens a dialog that provides version information about the Desktop Integration Suite client software.

4.4 Close Dialog

When you have a checked-out Office document open in your Office application and you close that document or the application, a special close dialog is displayed instead of the standard Office dialog (Figure 4–3).

Figure 4–3 Integration Close Dialog in Microsoft Office Application



This special close dialog enables you to decide what to do with your 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, 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. See "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 and "Save Changes and Check In Document Dialog" on page A-36 for more information.

4.5 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 Content Server instances). These new custom properties include:

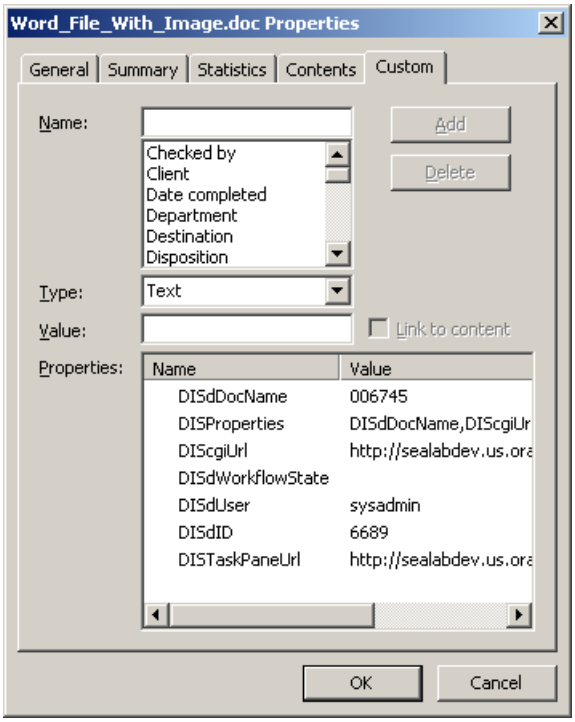
- **DISdDocName:** This is the content ID of the document on the content server. Every content item on the server has its own content ID, which uniquely identifies that item on the server. (Please note that each checked-in document revision has an additional, internal ID as a unique reference to that specific revision.)
- **DISProperties:** This is a list of all properties specific to Desktop Integration Suite.
- **DIScgiUrl:** This is the CGI URL of the content server that the document resides on. It essentially enables Office applications (or other third-party software) to "remember" what content server the 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).

To see the custom properties in Microsoft Office 2002 and 2003 applications, choose **File**, then **Properties**, and then open the **Custom** tab. In Microsoft Office 2007, click the Office button in the application, then choose **Prepare**, then **Properties**, then **Document Properties**, then **Advanced Properties**, and then open the **Custom** tab.

> **Note:** The custom properties are automatically handled by Desktop Integration Suite and should not be changed by end users.

Figure 4–4 Custom Document Properties (Microsoft Word 2003)



These custom document properties allow Desktop Integration Suite to keep track of where a managed file resides on a content server. This, in turn, enables users to check an Office 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 Word document from someone else, for example as an attachment to an e-mail
- You copied a managed Word document from a server in the integration hierarchy on your computer to a folder outside that hierarchy.

In either case, you can open that file in Microsoft Word on your computer, make changes, and then check it back in to the server using the Oracle UCM menu or ribbon in Word. Desktop Integration Suite looks at the custom properties embedded in the Word document to find out where to upload the file to.

5

Integration Into E-mail Clients

This section covers these topics:

- "About E-mail Client Integration" on page 5-1
- "Integration Into Microsoft Outlook" on page 5-1
- "Integration Into Lotus Notes" on page 5-3
- "Content Pane and Preview Pane" on page 5-5
- "Content Pane View Modes" on page 5-7
- "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8

5.1 About E-mail Client Integration

After installing the Desktop Integration Suite software on your computer, you can check e-mail messages and their attachments in to a content server directly from Microsoft Outlook or Lotus Notes and share them with others in your organization. You can drag and drop e-mails directly into content folders on a server, or you can use a special content check-in form (Oracle Content Server only).

Checked-in e-mail messages are not intended to be checked out, modified, and checked back in. E-mail 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 e-mail message from a server to view it in your default e-mail 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 9, "Working With E-mail" for more information on managing e-mail with content server.

5.2 Integration Into Microsoft Outlook

Desktop Integration Suite can work with Microsoft Outlook 2002 (XP) through 2007. After installing the integration software, you can interact with content servers and the files on them directly from Microsoft Outlook.

Desktop Integration Suite adds various integration features to Microsoft Outlook:

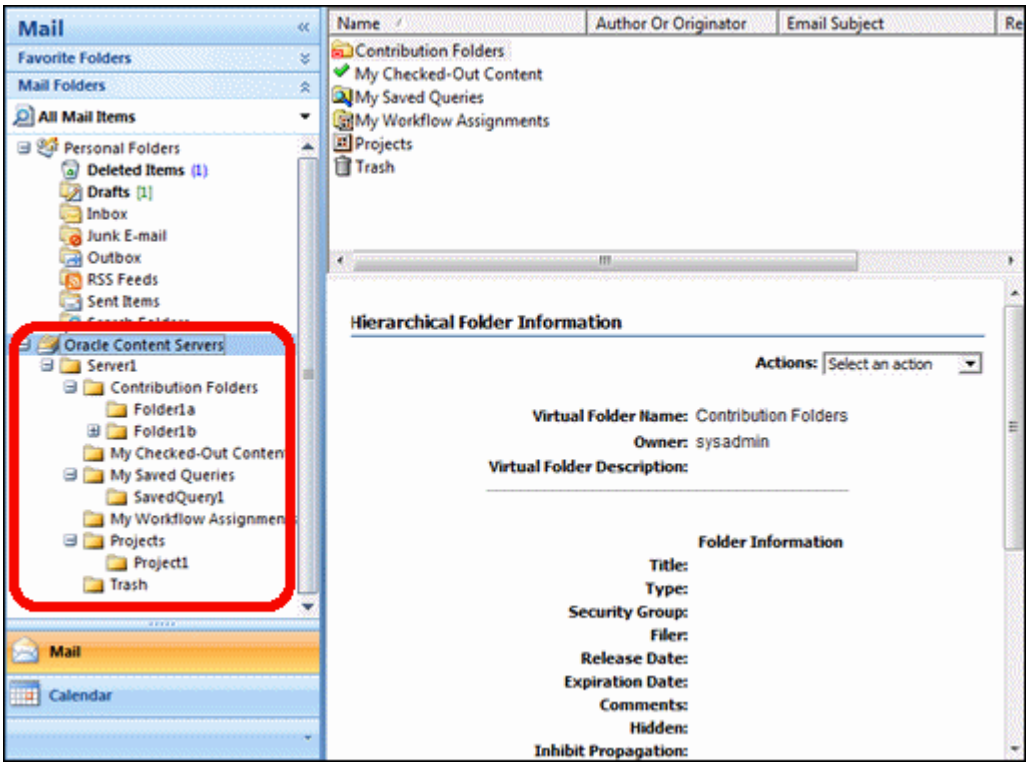
- Oracle Content Servers Hierarchy in Mail Folders
- Oracle UCM Menu
- Oracle UCM Toolbar

5.2.1 Oracle Content Servers Hierarchy in Mail Folders

The Desktop Integration Suite client software adds a hierarchical folder structure called **Oracle Content Servers** to the mail folders list in Microsoft Outlook (Figure 5–1). See Chapter 6, "Understanding the Integration Hierarchy" for more information on the integration hierarchy in your e-mail application.

Note: The Oracle Content Servers hierarchy is not displayed in the mail folders list by default. You must specifically enable it. See "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8 for more information.

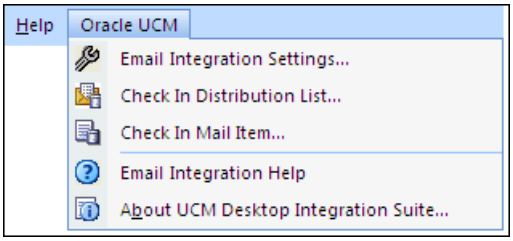
Figure 5–1 Integration Hierarchy in Microsoft Outlook 2007



5.2.2 Oracle UCM Menu

The Desktop Integration Suite client software adds a menu called **Oracle UCM** (Oracle Universal Content Management) to the menu bar in Microsoft Outlook (Figure 5–2).

Figure 5–2 Oracle UCM Menu in Microsoft Outlook 2007



The Oracle UCM menu contains the following menu items:

- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the e-mail client integration. See "Email Checkin Settings Dialog" on page A-49 for more information.
- **Check In Distribution List...:** This option opens a dialog where you can check an e-mail distribution list in to a content server. See "Distribution List Checkin Dialog" on page A-51 for more information.

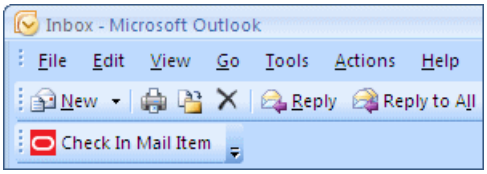
  See also "Working With Distribution Lists" on page 9-11.
- **Check In Mail Item...:** This option opens a dialog where you can check the currently selected e-mail message in to a content server. See "Check In Content Dialog (E-mail)" on page A-28 for more information.

  See also "Checking In E-mail" on page 9-3.
- **Email Integration Help:** This option launches the online help for Desktop Integration Suite in your standard web browser.
- **About UCM Desktop Integration Suite...:** This option opens a dialog that provides version information about the Desktop Integration Suite client software.

5.2.3 Oracle UCM Toolbar

The Desktop Integration Suite client software adds a toolbar called **Oracle UCM** to Microsoft Outlook (Figure 5–3). If you do not see the toolbar, you can display it by selecting **View**, then **Toolbars**, and then **Oracle UCM**.

Figure 5–3 Oracle UCM Toolbar in Microsoft Outlook 2007



The toolbar items depend on the application context. In the main Outlook window, the Oracle UCM toolbar contains the following option:

- **Check In Mail Item:** This option opens a dialog where you can check the currently selected e-mail message in to a content server. (You can also use the Oracle UCM menu to do this.) See "Check In Content Dialog (E-mail)" on page A-28 for more information.

In an e-mail editing window (new message or forward message), the Oracle UCM 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 e-mail message or hyperlinked in the message. See "Get Attachment Dialog" on page A-55 for more information.

5.3 Integration Into Lotus Notes

Desktop Integration Suite can work with the Lotus Notes e-mail client version 6.5.2 through 8.5 (with Lotus Domino mail databases based on release 6 or 7 mail templates; release 8 mail templates are currently not supported). After installing the integration software, you can interact with content servers and the files on them directly from the Lotus Notes client.

Desktop Integration Suite adds various integration features to Lotus Notes:

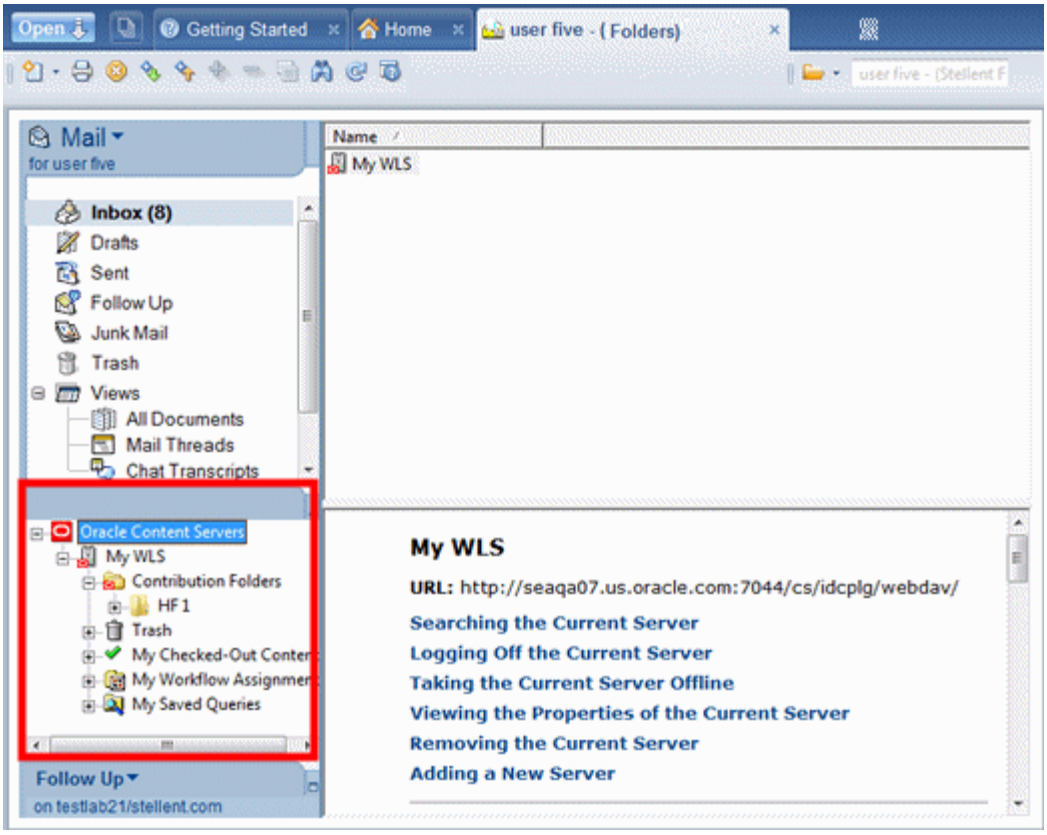
- Oracle Content Servers Hierarchy in Mail Pane
- Integration Items in Actions Menu

5.3.1 Oracle Content Servers Hierarchy in Mail Pane

The Desktop Integration Suite client software adds a hierarchical folder structure called **Oracle Content Servers** to the mail pane in Lotus Notes (Figure 5–4). See Chapter 6, "Understanding the Integration Hierarchy" for more information on the integration hierarchy in your e-mail application.

> **Note:** The Oracle Content Servers hierarchy is not displayed in the mail folders list by default. You must specifically enable it. See "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8 for more information.

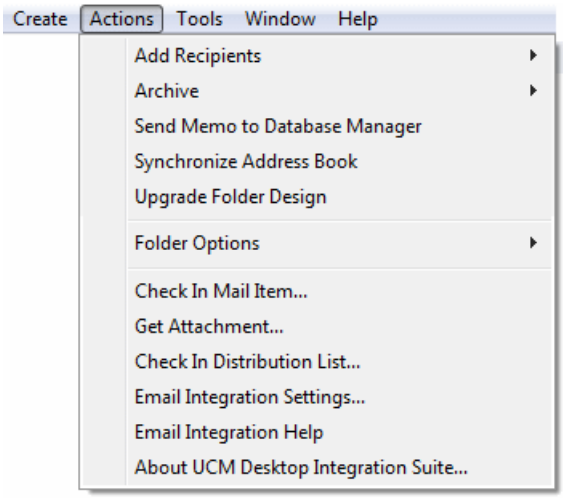
Figure 5–4 Integration Hierarchy in Lotus Notes 8



5.3.2 Integration Items in Actions Menu

The Desktop Integration Suite client software adds a number of new items to the **Actions** menu in Lotus Notes (Figure 5–5).

Figure 5–5 Actions Menu in Lotus Notes 8



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 e-mail message in to a content server. See "Check In Content Dialog (E-mail)" on page A-28 for more information.

  See also "Checking In E-mail" on page 9-3.

- **Get Attachment...:** This option opens a dialog where you can select a file on a content server to be attached to the current e-mail message. See "Get Attachment Dialog" on page A-55 for more information.

- **Check In Distribution List...:** This option opens a dialog where you can check an e-mail distribution list in to a content server. See "Distribution List Checkin Dialog" on page A-51 for more information.

  See also "Working With Distribution Lists" on page 9-11.

- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the e-mail client integration. See "Email Checkin Settings Dialog" on page A-49 for more information.

- **Email Integration Help:** This option launches the online help for Desktop Integration Suite in your standard web browser.

- **About UCM Desktop Integration Suite...:** This option opens a dialog that provides version information about the Desktop Integration Suite client software.

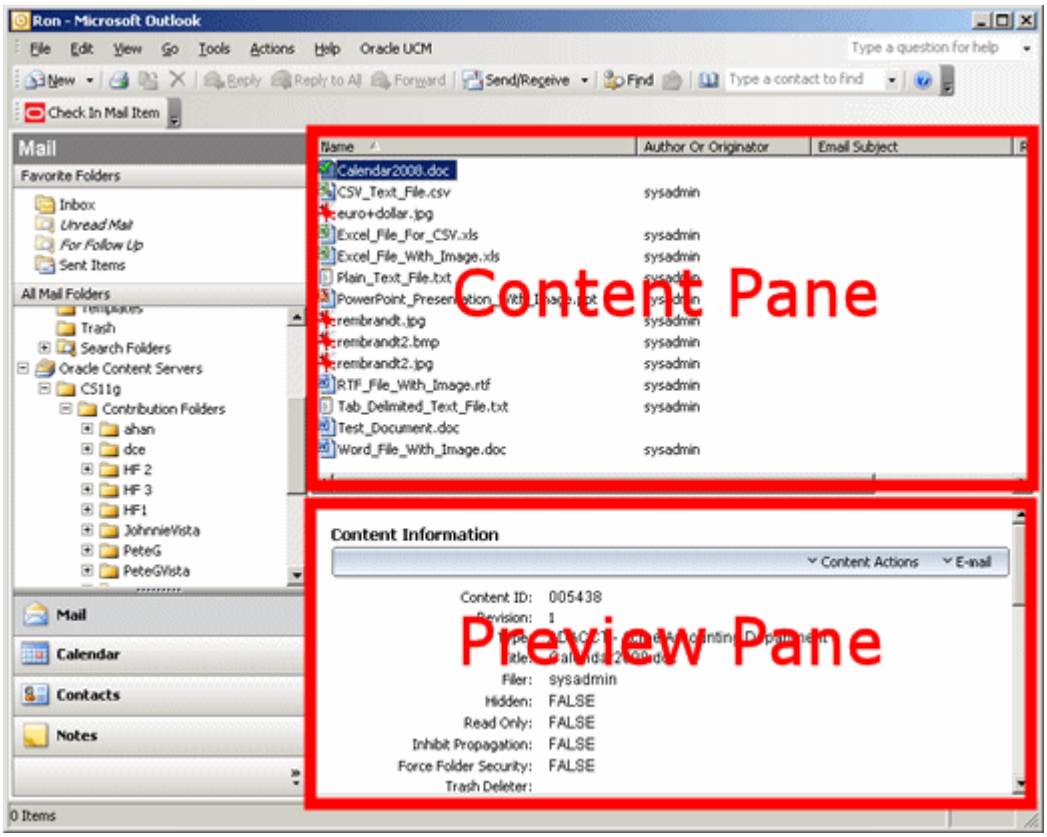
5.4 Content Pane and Preview Pane

The integration with your e-mail application (Microsoft Outlook or Lotus Notes) works much as you would expect. You can drag and drop e-mail messages into content server folders, copy and paste e-mail, create shortcuts, and so on.

When you select an object in the Oracle 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 folder. You may also see a preview pane, which shows additional information about the selected item in the content pane (for example, the content information page for a file on the content server).

If you do not see the preview pane, you may enable it. See "Showing or Hiding the Preview Pane" on page 6-17 for more information.

Figure 5–6 Content pane and preview pane in Microsoft Outlook 2003



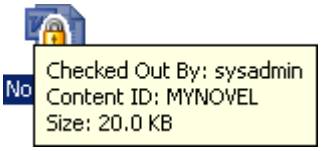
Content Management Status

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 5–7. See "Content File Status" on page 8-9 for a full explanation of all content management status icons.

Figure 5–7 Status Icon Overlaid on Top of Microsoft Word Application Icon

Also, 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 5–8. 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 5–8 Screen Tip Showing Content Management Information About File



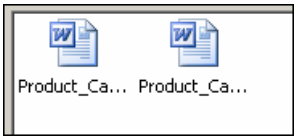
5.5 Content Pane View Modes

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 server folder). How the items are displayed depends on the view mode: icons view, list view, or details view.

Icons View

Icons view displays your files and folders as large application icons with their names shown below the icons. The files are always sorted by their file name.

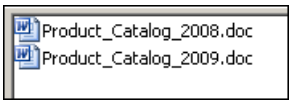
Figure 5–9 Icons View



List View

List view displays your files and folders as a list of file or folder names preceded by small application icons. The files are always sorted by their file name.

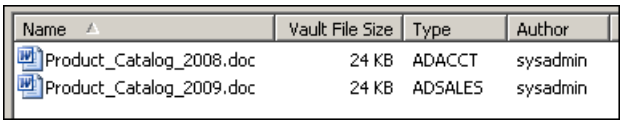
Figure 5–10 List View



Details View

Details view displays your files and folders as in list view, but with additional information such as file type, size, author, security group, timestamp, and the like (if available and relevant). You can sort the files by clicking on any column heading. Click again to reverse the sort order (from ascending to descending, or vice versa). You can define the columns that you want displayed and set their default width (see "Setting the Column Display" on page 6-17).

Figure 5–11 Details View



Note: In addition to the associated application, the file icons may also show the content management status of the file. See "Content File Status" on page 8-9 for more information.

Changing the View Mode

To change the view mode in the content pane, move the mouse cursor to any unused area of the content pane, right-click, choose **View**, and then **Icons**, **List**, or **Details**.

5.6 Showing or Hiding the Oracle Content Servers Hierarchy

You can choose to show or hide the Oracle Content Servers hierarchy in your e-mail application. The Oracle Content Servers hierarchy is not displayed by default.

> **Note:** In Lotus Notes, you can do this only if you have design rights to the Notes database. If you need any assistance, contact your Lotus Notes administrator.

Perform these steps to show or hide the Oracle Content Servers hierarchy in Microsoft Outlook or Lotus Notes:

1. Launch your e-mail application.
2. **Microsoft Outlook:** Open the **Oracle UCM** menu and then choose **Email Integration Settings...**.

   Lotus Notes: Open the **Actions** menu and then choose **Email Integration Settings...**.

   The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).
3. Select or clear the **Show Oracle Content Servers** check box to show or hide the integration hierarchy in your e-mail application.
4. Click **OK**.
5. If you changed the check box status, a reminder is displayed saying that you must restart the e-mail application for the change to take effect. Click **OK** to continue.
6. Click **OK** to return to the e-mail application.

> **Important:** Any changes will not take effect until you restart the e-mail application.

6

Understanding the Integration Hierarchy

This section covers these topics:

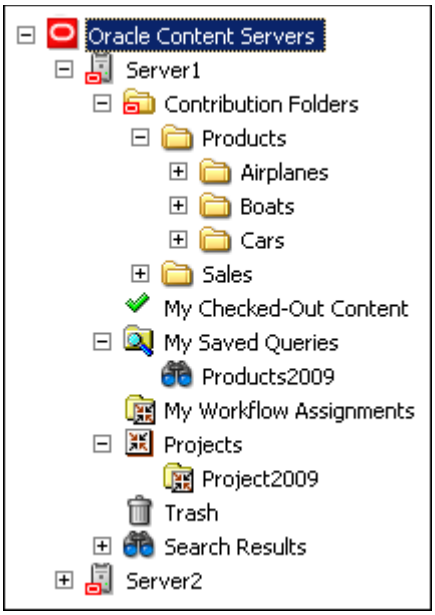
- "About the Integration Hierarchy" on page 6-1
- "Top-Level Node ("Oracle Content Servers")" on page 6-2
- "Content Server Nodes" on page 6-3
- "Oracle Content Server Repositories" on page 6-4
- "Oracle Content Database Repositories" on page 6-10
- "WebDAV Server Repositories" on page 6-11
- "Context Menus" on page 6-12
- "Showing or Hiding the Preview Pane" on page 6-17
- "Showing or Hiding the Folders Pane" on page 6-17
- "Setting the Column Display" on page 6-17

6.1 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 environment (Figure 6–1). It is fully integrated into Windows Explorer and supported e-mail applications (Microsoft Outlook and Lotus Notes). It is generally not available in Microsoft Office applications, where you use menus, toolbars, and ribbons to work with content servers and their files.

If you do not see the folders pane in Windows Explorer or your e-mail application, you need to turn it on. For example, in Windows XP, choose **View**, then **Explorer Bar**, and then **Folders**. Also, you may need to enable the integration hierarchy in your e-mail application as it is not displayed by default (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

Figure 6–1 Example of Integration Hierarchy (Fully Expanded)



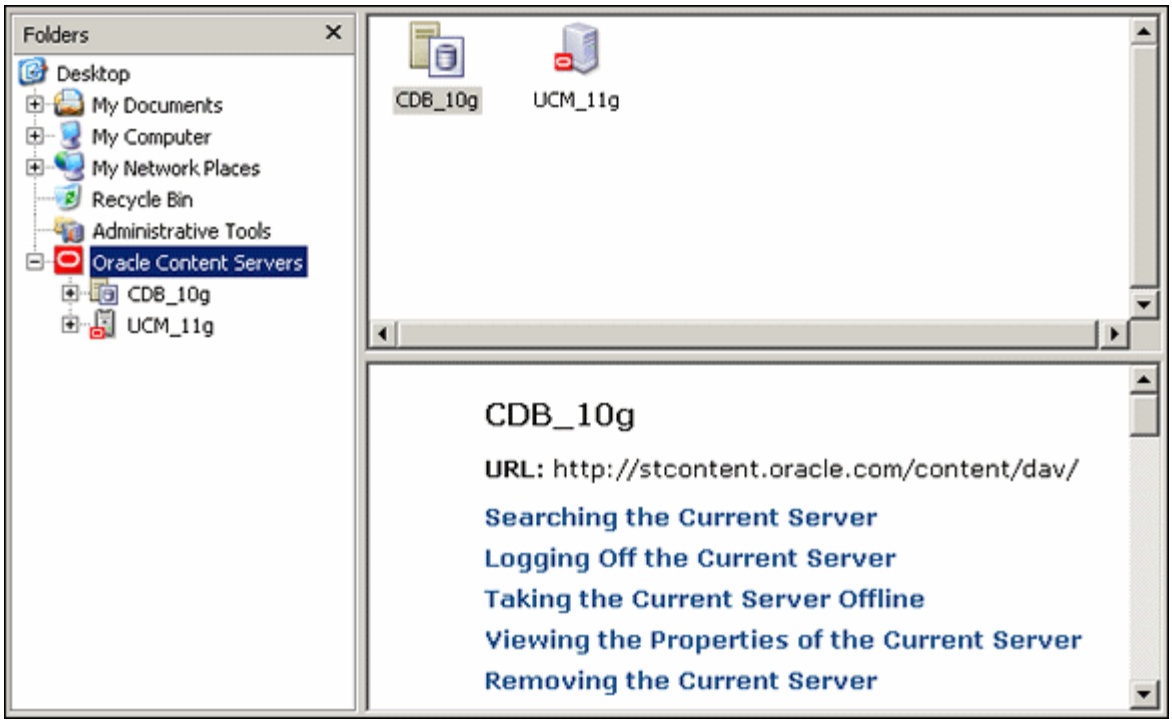
You work with content managed on a content server in much the same way you do with other folders and files on your computer. You can copy files, drag and drop files into folders, right-click objects to open context menus (see "Context Menus" on page 6-12), and so on. However, some tasks typically performed 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 file or saving an e-mail message to a contribution 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. See Chapter 8, "Working With Content Folders and Files" for more information.

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.

6.2 Top-Level Node ("Oracle Content Servers")

The top-level node in the integration hierarchy is always called "Oracle Content Servers." You cannot modify its name, nor can you delete this node. You may need to enable its display in your e-mail application as it is not displayed by default (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

Figure 6–2 Oracle Content Servers in Integration Hierarchy (Windows Explorer)



Content Pane

With the top-level Oracle Content Servers node in the integration hierarchy selected, the content pane shows all defined content server connections. How this information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5). The icon of each server denotes its type (see "Content Server Types" on page 7-2).

Preview Pane

If a server is selected in the content pane, the preview pane shows the URL of the selected server connection, as well as general help information about working with content servers. If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.3 Content Server Nodes

The content server nodes are immediately below the top-level Oracle 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 configuration and current login status, you may be prompted to provide your login credentials for that server (that is, 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 "Add Server Dialog" on page A-2).

The icon in front of each server in the integration hierarchy denotes its type (see "Content Server Types" on page 7-2).

Content Pane

With a content server node in the integration hierarchy selected, the content pane shows all main nodes and folders for that server. The available server nodes and folders depend on the server type:

- Oracle Content Server Repositories
- Oracle Content Database Repositories
- WebDAV Server Repositories

How the information in the content pane is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

Preview Pane

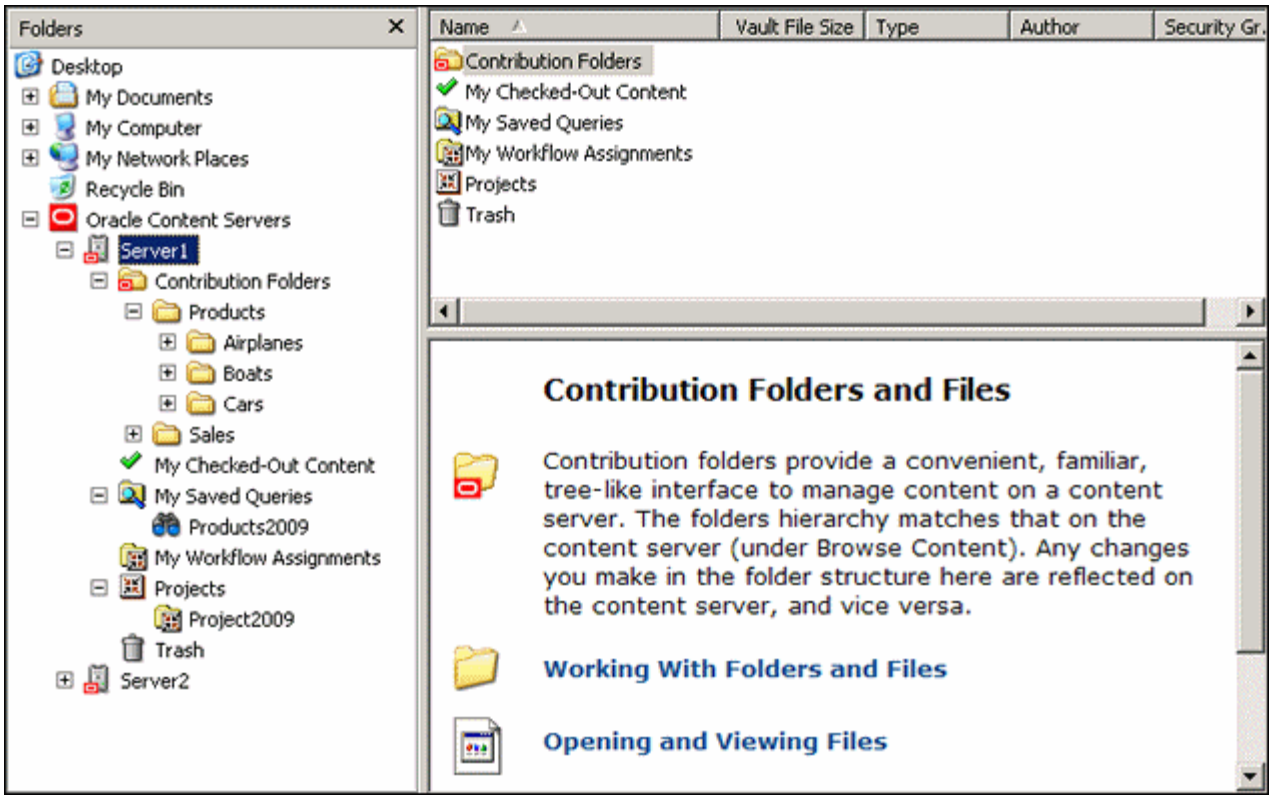
If one of the content server nodes in the integration hierarchy is selected in the content pane, the preview pane shows information about the server (for Oracle Content DB servers) or general help information for the server (for Oracle Content Server instances). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4 Oracle Content Server Repositories

Desktop Integration Suite provides direct access to content on Oracle Content Server instances ("UCM content servers"). This server type is represented in the integration hierarchy using the icons shown in Figure 6–3.

Figure 6–3 Icons for Oracle Content Server ("UCM Server")

Figure 6–4 Oracle Content Server Instance in Integration Hierarchy



Depending on the server configuration, an Oracle Content Server node in the integration hierarchy may consist of the following elements:

- Contribution Folders (Content Server Folders)
- My Checked-Out Content
- My Saved Queries
- My Workflow Assignments
- Projects
- Trash
- Search Results

6.4.1 Contribution Folders (Content Server Folders)

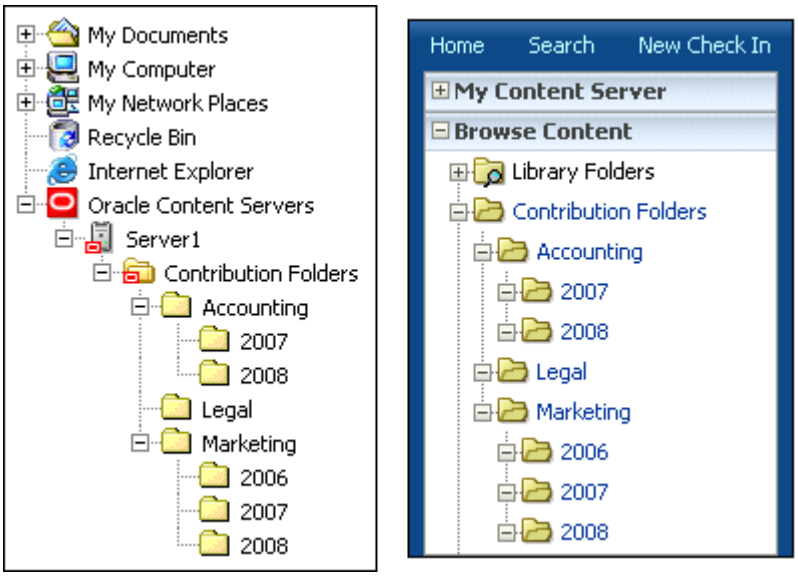
The content folders tree on an Oracle Content Server instance enables you to work with content on that server using the familiar folders structure used in Windows Explorer and e-mail applications. The top-level content folder node is called Contribution Folders in Oracle Content Server 11*g*R1 and Content Server Folders in Oracle Content Server 10*g*R3 and 7.5.2.

The Contribution Folders or Content Server Folders node is included in the integration hierarchy for an Oracle Content Server instance only if your system administrator has enabled the folders functionality on that server.

The folder structure under Contribution Folders or Content Server Folders in the integration hierarchy is identical to that in the Oracle Content Server web interface

(under 'Browse Content'), as illustrated in Figure 6–5. You only see folders and files for which you were assigned access privileges.

Figure 6–5 Contribution Folders in Windows Explorer and Oracle Content Server's Web Interface



See Chapter 8, "Working With Content Folders and Files" for more information about using contribution folders and the files in them.

Content Pane

With a contribution folder in the integration hierarchy selected, the content pane shows the contents of that contribution folder (subfolders and files). You only see folders and files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If an object is selected in the content pane, the preview pane shows information about that object from the content server (that is, the hierarchical folder information page for folders and the content information page for files). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.2 My Checked-Out Content

The My Checked-Out Content node in the integration hierarchy of an Oracle Content Server instance lists all content files that you have currently checked out of that particular 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 Content Server web interface (under 'My Content Server').

Note: The My Checked-Out Content node is available only if you are connecting to an Oracle Content Server 11*g* instance.

Content Pane

With the My Checked-Out Content node selected in the integration hierarchy, the content pane shows all content items that you yourself have currently checked out of the associated content server. How this information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The checked-out status of the content items in the list is indicated by a green check mark icon overlay of the application icons of the files (see also "Content File Status" on page 8-9).

Table 6–1 Status Icons for Content Items

Icon	Description
	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. Please note that all shortcuts to a checked-out file will also show this icon, since they are linked to the original file.
	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 made changes to your local copy and have not checked the item back in to the content server again. The icon provides a visual reminder for this. Please note that all shortcuts to a checked-out file will also show this icon, since they are linked to the original file.

Preview Pane

If one of the checked-out files is selected in the content pane, the preview pane shows information about that file (that is, its content information page on the content server). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.3 My Saved Queries

The My Saved Queries node in the integration hierarchy of an Oracle Content Server instance lists all search queries that you performed on that server and decided to save. The My Saved Queries list in the integration hierarchy is identical to that in the Oracle 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.

Each saved query is dynamic, which means that every time you run it, the search results list 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 Content Server web interface (under 'My Content Server').

Note: The My Saved Queries node is available only if you are connecting to an Oracle Content Server 11*g* instance.

Content Pane

With the My Saved Queries node selected in the integration hierarchy, the content pane shows all search queries that you have currently saved on the associated content server.

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

Note: The items in the search results list do not show their content management status in their file icons.

Preview Pane

The preview pane remains blank until you double-click a saved query (or select it and press Enter) to execute it. The preview pane then displays the query's search results. If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.4 My Workflow Assignments

The My Workflow Assignments node in the integration hierarchy of a content server lists all content files 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.

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

Note: The My Workflow Assignments node is available only if you are connecting to an Oracle Content Server 11*g* instance.

See the Oracle Content Server user documentation for more information about workflows.

Content Pane

With the My Workflow Assignments node selected in the integration hierarchy, the content pane shows all content items in workflows that are currently assigned to review on the associated content server. You only see folders and files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If one of the files is selected in the content pane, the preview pane shows the workflow information for that file (for example, the workflow step that the content item is currently in). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.5 Projects

The Projects node on an Oracle Content Server instance enables you to work with collaboration projects and the files associated with them on that server using the file tree structure used in Windows Explorer and e-mail applications.

> **Note:** The Projects node is included in the integration hierarchy for an Oracle Content Server instance only if your system administrator has enabled the Collaboration Manager add-on on that server.

Content Pane

With the Projects node selected in the integration hierarchy, the content pane shows all collaboration projects available on the associated content server. If you select a specific project in the integration hierarchy, the content pane shows the contents of that collaboration project (subfolders and files). You only see folders and files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If an object is selected in the content pane, the preview pane shows information about that object from the content server (for example, the content information page for files). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.6 Trash

The Trash node in the integration hierarchy of an Oracle Content Server instance lists all content files that you have deleted from that particular server. You see only files that you deleted yourself, not other people's deleted files.

> **Note:** The Trash node is included in the integration hierarchy for an Oracle Content Server instance only if your system administrator has enabled the trash functionality on that server.

Content Pane

With the Trash node in the integration hierarchy selected, the content pane shows the contents of the trash bin on the associated content server. How this information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If an object is selected in the content pane, the preview pane shows information about that object from the content server (that is, the hierarchical folder information page for folders and the content information page for files). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.4.7 Search Results

The Search Results folder in the integration hierarchy of an Oracle Content Server instance lists all files on that server that meet the criteria of a search query that was just performed. See "Searching a Content Server" on page 7-11 for more information.

Content Pane

With the Search Results folder in the integration hierarchy selected, the content pane shows all files on the associated server that meet the criteria of a search query that was just performed. You only see files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

Note: The items in the search results list do not show their content management status in their file icons.

Caution: The items in the search results list are the actual files (not a copy or pointer of some sort). If you delete a file from the search results list, you are removing the actual content item from the content server. Be careful when working with items in the search results list!

Preview Pane

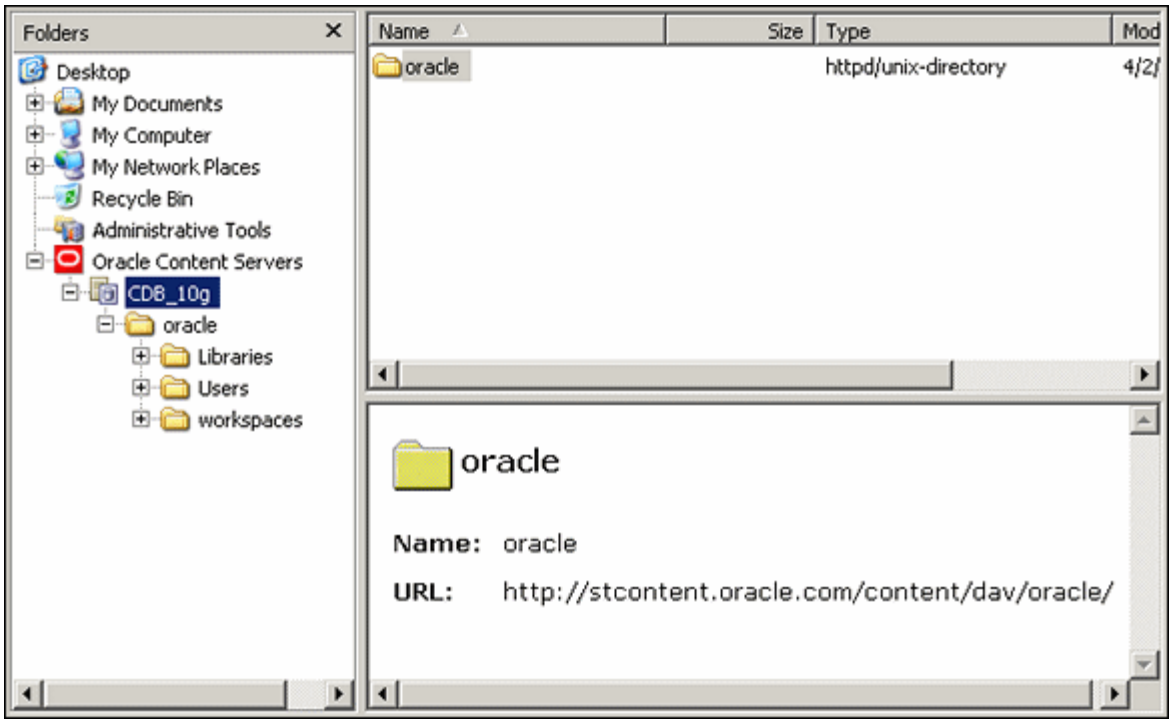
If an item is selected in the search results list in the content pane, the preview pane shows information about that file (that is, its content information page on the content server). If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.5 Oracle Content Database Repositories

Desktop Integration Suite provides direct access to content on Oracle Content Database (Content DB) servers. This server type is represented in the integration hierarchy using the icons shown in Figure 6–6.

Figure 6–6 Icons for Oracle Content Database (Content DB)

Figure 6–7 Oracle Content Database Server in Integration Hierarchy



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

Content Pane

With an Oracle Content Database folder in the integration hierarchy selected, the content pane shows the contents of that folder (subfolders and files). You only see folders and files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If an object is selected in the content pane, the preview pane shows the name and URL of that object on the content server. If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.6 WebDAV Server Repositories

Desktop Integration Suite provides direct access to files on any non-UCM, non-Content DB server that supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. (Please note that the WebDAV DeltaV extension is not supported.) This server type is represented in the integration hierarchy using the icons shown in Figure 6–8.

Figure 6–8 Icons for WebDAV Servers

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

Content Pane

With a WebDAV server folder in the integration hierarchy selected, the content pane shows the contents of that folder (subfolders and files). You only see folders and files for which you were assigned access privileges. How the information is displayed depends on the current view mode (see "Content Pane View Modes" on page 3-5).

The icons of files show their associated applications (for example, Microsoft Word for .doc files) as well as their content management status (in the form of application icon overlays), if applicable. See "Content File Status" on page 8-9 for more information.

Preview Pane

If an object is selected in the content pane, the preview pane shows the name and URL of that object on the WebDAV server. If you do not see the preview pane, you may enable it (see "Showing or Hiding the Preview Pane" on page 6-17.

6.7 Context Menus

Like most Windows applications, Desktop Integration Suite offers context menus that provide relevant options depending on where you are in the application. For example, with a contribution 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. Alternatively, you can select the object and press Shift+F10.

The options on the context menu depend on the object type:

- General
- Servers
- Folders
- Files

> **Note:** These sections only show the context menu options specific to Desktop Integration Suite. Other options may be available, including options related to other Oracle content management products such as Oracle Universal Records Management (URM) or Oracle Information Rights Management (IRM). See the documentation of these products for more information on these options.

6.7.1 General

The Desktop Integration Suite context menus may include the following general, shared options:

- **Expand / Collapse:** Shows or hides the subfolder tree under the current object in the integration hierarchy.

- **Explore**: Opens the current object in a new window, with the folders pane visible.
- **View:** Opens a submenu containing the following options:
  - **Icons:** Sets icons view mode in the content pane, which displays your files and folders as large application icons with their names shown below the icons.
  - **List:** Sets list view mode in the content pane, which displays your files and folders as a list of file or folder names preceded by small application icons.
  - **Details:** Sets details view mode in the content pane, which displays your files and folders as in list mode, but with additional information such as file type, size, author, security group, timestamp, and the like (if available and relevant).
  - **Preview Pane:** Shows or hides the preview pane, which displays information about the select object in the content pane.
- **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.)
- **Refresh:** Updates the view in the content pane to reflect the latest state on the content server.

6.7.2 Servers

The Desktop Integration Suite 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...** (UCM content servers 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. See "Searching a Content Server" on page 7-11 and "Searching for Content Files" on page 8-34 for more information.
- **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. See "Logging Off a Content Server" on page 7-10 for more information.
- **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. See "Working With a Content Server Offline" on page 7-10 and "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Remove:** Enables you to remove the selected server connection from the integration hierarchy. See "Removing a Content Server Connection" on page 7-9 for more information.
- **Properties:** Opens a dialog which shows a number of properties of the current content server. See "Viewing or Editing Content Server Connection Properties" on page 7-8 for more information.
- **Add Server...:** Opens a dialog where you can add a new content server connection to the integration hierarchy. See "Adding a Content Server Connection" on page 7-6 for more information.

- **Save Query:** Saves the current search query in your list of saved queries (see "My Saved Queries" on page 6-7). This enables you to quickly perform the search query again to see the latest dynamic search results.
- **View Query Definition:** Opens a dialog that shows the query statement for the selected saved query.

6.7.3 Folders

The Desktop Integration Suite context menus may include the following folder-related options:

- **New Folder:** Enables you to create a new contribution 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 each selected contribution 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. See "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Refresh Offline Content:** Updates the offline file cache on your local computer to reflect the latest content of the corresponding contribution folder(s) or collaboration project(s) on the content server. See "Refreshing Offline Content" on page 8-42 for more information.
- **Remove Offline Content:** Deletes the content in each 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. See "Removing Offline Content" on page 8-43 for more information.
- **Search...** (UCM servers 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. See "Searching a Content Server" on page 7-11 for more information.
- **Propagate** (UCM servers only): Copies the metadata of each selected contribution folder or collaboration project to all subfolders and files in that folder or project. See "Propagating Folder Metadata" on page 8-33 for more information.
- **Copy:** Copies each selected contribution 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.) See "Copying Content Folders and Files" on page 8-29 for more information.
- **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** (UCM servers only): Creates a shortcut to the selected contribution folder or collaboration project at the same folder or project level in the integration hierarchy. See "Working With Shortcuts to Content Folders and Files" on page 8-36 for more information.

- **Delete:** Removes the selected contribution 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.* See "Deleting Content Folders and Files" on page 8-32 for more information.
- **Rename:** Enables you to give the selected contribution folder or collaboration project in the integration hierarchy a new name. (You can also press the F2 key to do this.) See "Renaming Content Folders and Files" on page 8-28 for more information.
- **Content Information...** (UCM servers only): Displays the content information page on the server for the selected folder or project in the integration hierarchy. See "Viewing and Modifying Content Information of Folders or Files" on page 8-26 for more information.
- **Properties:** Displays a dialog that provides information about the selected folder or project in the integration hierarchy. See "Viewing and Modifying Properties of Folders or Files" on page 8-25 for more information.
- **Advanced Properties** (Content DB servers only): Displays a window that displays the properties about the selected folder in the integration hierarchy. See "Viewing and Modifying Advanced Properties of Folders or Files" on page 8-27 for more information.
- **Sharing** (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. See "Viewing and Modifying Sharing Properties of Folders or Files" on page 8-27 for more information.

6.7.4 Files

The Desktop Integration Suite context menus may include the following file-related options:

- **View:** Opens each selected file in its associated application in 'read-only' mode; that is, it is not checked out of the content server, and if you make any changes, you must check it in as a new content item. See "Viewing Content Files" on page 8-16 for more information.
- **Open:** Opens each 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. See "Opening Content Files" on page 8-17 for more information.
- **Check Out:** Retrieves each selected file from the content server and makes it available for editing. See "Checking Out Content Files" on page 8-18 for more information.
- **Undo Check Out:** Cancels the checked-out status of each selected file on the content server. See "Undoing a File Check-Out" on page 8-20 for more information.
- **Check In:** Uploads each 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. See "Checking In Content Files" on page 8-21 for more information.
- **Make 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. See "Working With Offline Content Folders and Files" on page 8-41 for more information.

- **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.
- **Approve:** Marks the current file in a workflow as approved and allows it to move to the next step in the workflow. You can approve files only if they are not currently checked out. See "Working With Content Files in Workflows" on page 8-39 for more information.
- **Reject:** Marks the current file in a workflow as rejected and returns it to the previous step in the workflow. You can reject files only if they are not currently checked out. See "Working With Content Files in Workflows" on page 8-39 for more information.
- **Copy:** Copies each selected file in the integration hierarchy into the copy-and-paste buffer. You can then create a copy of that file by pasting it to a different location. (You can also press the Ctrl+C key combination to do this.) See "Copying Content Folders and Files" on page 8-29 for more information.
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location.
- **Copy Links**: Copies the URL of each selected file in the integration hierarchy into the copy-and-paste buffer. You can then paste these URL(s) into any Windows application (for example, an e-mail message) to provide direct links to the file(s). See "Copying Content File Links" on page 8-38 for more information.
- **Create Shortcut** (UCM servers only): Creates a shortcut to each selected file in the same integration hierarchy folder as the referenced file or files. See "Working With Shortcuts to Content Folders and Files" on page 8-36 for more information.
- **Delete:** Removes each 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.* See "Deleting Content Folders and Files" on page 8-32 for more information.
- **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.) Please note that this option is not available when the file is currently checked out of the content server. See "Renaming Content Folders and Files" on page 8-28 for more information.
- **Content Information...** (UCM servers only): Displays the content information page on the server for the selected file in the integration hierarchy. See "Viewing and Modifying Content Information of Folders or Files" on page 8-26 for more information.
- **Properties:** Displays a dialog that provides information about the selected file in the integration hierarchy. See "Viewing and Modifying Properties of Folders or Files" on page 8-25 for more information.
- **Advanced Properties** (Content DB servers only): Displays a window that displays the properties about the selected file in the integration hierarchy. See "Viewing and Modifying Advanced Properties of Folders or Files" on page 8-27 for more information.

- **Sharing** (Content DB servers only): Displays a window where you can set the properties for sharing the selected file(s); in other words, who has access to the folder and who can create content in it. See "Viewing and Modifying Sharing Properties of Folders or Files" on page 8-27 for more information.

6.8 Showing or Hiding the Preview Pane

The preview pane shows information about the selected item in the content pane; for example, the content information page of a file on the content server. 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 only see the preview pane if it was enabled there.

Windows Explorer

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

- In the **View** menu, choose **Preview Pane**.
- Right-click in an unused area of the content pane, choose **View** in the context menu, and then **Preview Pane**.
- Click the preview icon on the toolbar (Figure 6–9). Please note that this icon is visible if any item in the Oracle Content Servers integration hierarchy is selected.

Figure 6–9 Preview Icon in Windows Explorer Toolbar

E-mail Application

To show or hide the preview pane in Microsoft Outlook or Lotus Notes, right-click in an unused area of the content pane, choose **View** in the context menu, and then **Preview Pane**.

6.9 Showing or Hiding the Folders Pane

The folders pane shows the file or mail folders tree in Windows Explorer or your e-mail application (Microsoft Outlook or Lotus Notes). If you do not see the folders pane, you must enable it.

Windows Explorer

To show the folders pane in Windows Explorer, open the **View** menu, then choose **Explorer Bar**, and then **Folders**.

Microsoft Outlook

To show the mail folders pane in Microsoft Outlook, open the **View** menu and then choose **Navigation Pane**.

6.10 Setting the Column Display

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 (see "Content Pane View Modes" on page 3-5), the content pane includes a

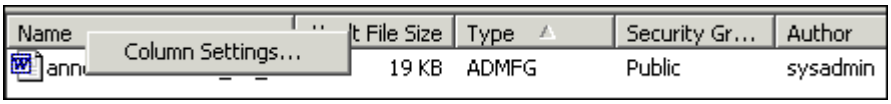
number of columns that show some metadata information about the files or folders (for example, their security group or author). You can set the metadata columns to be displayed as well as the default width of the columns.

Perform these steps to change the display of the columns:

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. See "Content Pane View Modes" on page 3-5 for more information.
3. Right-click any of the column headings in the content pane.

   A **Column Settings...** option is displayed (Figure 6–10).

Figure 6–10 Column Display Settings



4. Click **Column Settings...** in the context menu.

   The Column Settings dialog is displayed (see "Column Settings Dialog" on page A-11).
5. The Column Settings dialog shows all available metadata fields from the content server that you can display as columns in the integration hierarchy.

   Select a check box to display that metadata field in the content pane. Clear it to hide the metadata field. You can also select a metadata field and click **Show** or **Hide** to control its display in the content pane.

   To resize a column, select the metadata field and change its pixel width by entering the width in the "The selected column should be *x* pixels wide" option. You can also resize a column directly in Windows Explorer by dragging its right edge (as is customary in Windows).

   To reorder the columns, click a selected metadata value and click **Move Up** or **Move Down** until it is in the correct location. The columns are displayed left to right as they appear in the list, so the higher a selected column is in the list, the more to the left it is displayed on screen.
6. Click **OK** when you are done. (The changes take effect immediately.)

7

Working With Content Server Connections

This section covers these topics:

- "About Content Server Connections" on page 7-1
- "Content Server Types" on page 7-2
- "Content Server Capabilities" on page 7-2
- "Content Server URLs" on page 7-3
- "Online vs. Offline Servers" on page 7-4
- "Server Context Menus" on page 7-5
- "Adding a Content Server Connection" on page 7-6
- "Viewing or Editing Content Server Connection Properties" on page 7-8
- "Removing a Content Server Connection" on page 7-9
- "Connecting to a Content Server" on page 7-10
- "Logging Off a Content Server" on page 7-10
- "Working With a Content Server Offline" on page 7-10
- "Searching a Content Server" on page 7-11
- "Setting Metadata To Be Remembered for Form-Based Check-ins" on page 7-12
- "Setting the Authentication Method" on page 7-13
- "Identifying the URLs for Oracle Content Server" on page 7-13

7.1 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 Integration Suite 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.

7.2 Content Server Types

The Desktop Integration Suite client can connect to these types of servers:

- **UCM Content Server:** This is an instance of Oracle Content Server, which is part of Oracle Universal Content Management (UCM). These servers offer the broadest content management integration: opening files directly from the server (check-out), saving files to the server (check-in), searching for files on the server, and so on.
- **Content DB Server:** This is an Oracle Content Database (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 Desktop Integration Suite.
- **WebDAV Server:** This is a non-UCM, non-Content DB server that supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. (Please note that 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 Desktop Integration Suite.

You select the content server type when you create the server connection (see "Adding a Content Server Connection" on page 7-6). Consult your system administrator if you are not sure which server type to use.

Server Type Icons

Each server type has its own icons that visually identify it in the integration hierarchy.

Server Icons	Server Type
	UCM content server (that is, an Oracle Content Server instance)
	Oracle Content Database (Content DB) server
	Other WebDAV server

7.3 Content Server Capabilities

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

Content Management Capability	UCM Servers	Content DB Servers	WebDAV Servers
Checking files out of the server	yes	yes	yes

Content Management Capability	UCM Servers	Content DB Servers	WebDAV Servers
Checking files and e-mails in to the server by saving them to server folders	yes	yes	yes
Checking files and e-mails in to the server by dragging and dropping them into server folders	yes	yes	yes
Checking files and e-mails in to the server using a check-in form	yes	no	no
Browsing to files on the server	yes	yes	yes
Searching for files on the server	yes	no	no
Dragging and dropping files into folders on the server	yes	yes	yes
Working with offline files on the server	yes	yes	yes
Copying links to files and folders on the server	yes	yes	yes
Creating shortcuts to files and folders on the server	yes	yes (2)	yes (2)
Propagating metadata to subfolders and files	yes	no	no
Inserting links to files on the server into Microsoft Office documents	yes	no	no
Inserting content files from the server into Microsoft Office documents	yes	no	no
Inserting graphic files from the server into Microsoft Office documents	yes	no	no
Comparing Word documents on the server	yes	no	no
Working with content profiles on search and check-in pages	yes (1)	no	no
Seeing your checked-out content, workflow assignments, and saved queries	yes (1)	no	no

Notes

1. Only if you are connecting to Oracle Content Server 11*g*, not earlier versions.
2. Only standard Windows shortcuts, not content server shortcuts (see "About Content Folder and File Shortcuts" on page 8-36).

7.4 Content Server URLs

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). Please note that 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 Content Server

Oracle Content Server instances ("UCM servers") require both a WebDAV URL and CGI URL. The **WebDAV URL** 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
```

See "Identifying the URLs for Oracle Content Server" on page 7-13 for a way to find out what the URL of an Oracle Content Server instance is. You can also ask your system administrator what URLs to use.

If clients should connect to an Oracle Content Server 11*g*R1 instance using **basic authentication** rather than form-based authentication (that is, using a login dialog), then '_dav' should be added to the server's WebDAV URL and HTTPS should be used, for example:

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

WebDAV URLs with '_dav' are not supported in Oracle Content Server 10*g*R3 and 7.5.2.

Content DB Servers and WebDAV Servers

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 Integration Suite on your own computer, as this is often handled by system administrators.

7.5 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 "Local Caching of Content Files" on page 8-7). You can specifically designate content files and entire folders to be available offline (see "Making Folders and Files Available Offline" on page 8-42). 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).

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 7–1). 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 7–1 Offline Icon

7.6 Server Context Menus

The Desktop Integration Suite 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...** (UCM content servers 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. See "Searching a Content Server" on page 7-11 and "Searching for Content Files" on page 8-34 for more information.
- **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. See "Logging Off a Content Server" on page 7-10 for more information.
- **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. See "Working With a Content Server Offline" on page 7-10 and "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Remove:** Enables you to remove the selected server connection from the integration hierarchy. See "Removing a Content Server Connection" on page 7-9 for more information.
- **Properties:** Opens a dialog which shows a number of properties of the current content server. See "Viewing or Editing Content Server Connection Properties" on page 7-8 for more information.
- **Add Server...:** Opens a dialog where you can add a new content server connection to the integration hierarchy. See "Adding a Content Server Connection" on page 7-6 for more information.
- **Save Query:** Saves the current search query in your list of saved queries (see "My Saved Queries" on page 6-7). This enables you to quickly perform the search query again to see the latest dynamic search results.
- **View Query Definition:** Opens a dialog that shows the query statement for the selected saved query.

7.7 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.

Perform these steps to add a new content server connection:

1. **Windows Explorer or E-mail Application:**

   a. Select the top-level integration folder ("Oracle Content Servers") in your folders pane. You may need to enable its display in your e-mail application (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

      or

      Move the mouse cursor to an unused area in the content pane (that is, away from any of the items listed in it).

   b. Right-click and choose **Add Server...** in the context menu.

      The Add Server dialog is displayed (see "Add Server Dialog" on page A-2).

   Microsoft Word, PowerPoint, and Excel:

   a. Open the **Oracle UCM** menu or ribbon, and then choose **Edit Server List...**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

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

      The Add Server dialog is displayed (see "Add Server Dialog" on page A-2).

   Microsoft Outlook:

   a. Open the **Oracle UCM** menu and choose **Email Integration Settings...**.

      The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

   b. Choose **Edit Server List**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   c. Choose **New...**.

      The Add Server dialog is displayed (see "Add Server Dialog" on page A-2).

   Lotus Notes:

   a. Open the **Actions** menu and choose **Email Integration Settings...**.

      The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

   b. Choose **Edit Server List**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   c. Choose **New...**.

      The Add Server dialog is displayed (see "Add Server Dialog" on page A-2).

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:
   - UCM Content Server
   - Content DB Server
   - WebDAV Server

   See "Content Server Types" on page 7-2 for more information. 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 "Content Server URLs" on page 7-3 and "Identifying the URLs for Oracle Content Server" on page 7-13.

   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 "Content Server URLs" on page 7-3 and "Identifying the URLs for Oracle Content Server" on page 7-13.

   Please note that 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. If you want the server connection to use single sign-on (SSO), select the **Use Single Sign-On** checkbox 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.

   Please note that the SSO section is not available for content servers of type "UCM Server" (that is, Oracle Content Server instances).

7. Click **Options** to open the Server Options dialog (see "Server Options Dialog" on page A-5) for Oracle 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.

8. Click **OK** in the Add Server dialog.

   The new server connection is now added to the integration hierarchy (under "Oracle Content Servers"), and is available to all other integrated 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 Integration Suite software (see "Installing the Latest Version of Desktop Integration Suite" on page 2-3), any server connections that you set up earlier will continue to be available after reinstalling the software.

7.8 Viewing or Editing Content Server Connection Properties

Perform these steps to view or edit the properties of an existing content server connection:

1. **Windows Explorer:**

   a. Select a content server in the Oracle Content Servers integration hierarchy.

   b. Right-click and choose **Properties** in the context menu.

      The Server Properties dialog is displayed (see "Server Properties Dialog" on page A-8).

   Microsoft Word, PowerPoint, and Excel:

   a. Open the **Oracle UCM** menu or ribbon, and then choose **Edit Server List...**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   b. Select the server connection whose properties you want to view, and choose **View...**.

      The Edit Server dialog is displayed (see "Edit Server Dialog" on page A-10).

   Microsoft Outlook:

   a. Open the **Oracle UCM** menu and choose **Email Integration Settings...**.

      The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

   b. Choose **Edit Server List**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   c. Select the server connection whose properties you want to view, and choose **View...**.

      The Edit Server dialog is displayed (see "Edit Server Dialog" on page A-10).

   Lotus Notes:

   a. Open the **Actions** menu and choose **Email Integration Settings...**.

      The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

   b. Choose **Edit Server List**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   c. Select the server connection whose properties you want to view, and choose **View...**.

The Edit Server dialog is displayed (see "Edit Server Dialog" on page A-10).

2. You cannot change the server name, type, and URLs in Microsoft Office applications and e-mail applications. In Windows Explorer, you may change the server name if no content items on the server are currently in your local cache (see "Local Caching of Content Files" on page 8-7). If you modify the server name, it is updated automatically in the Oracle Content Servers integration hierarchy.

   For servers of type "UCM Content Server," you can modify the server options. Click **Options...** in the Edit Server dialog to open the Server Options dialog, where you can set the authentication method for the server as well as the metadata that will be remembered for each check-in. See "Server Options Dialog" on page A-5 for more information.

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

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

7.9 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.

Perform these steps to remove a server connection:

1. **Windows Explorer:**

   a. Select a content server in the Oracle Content Servers integration hierarchy in your folders pane.

   b. Right-click and choose **Remove** in the context menu. Alternatively, you can also press **Delete** on your keyboard.

   Microsoft Word, PowerPoint, and Excel:

   a. Open the **Oracle UCM** menu or ribbon, and then choose **Edit Server List...**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   b. Select the server connection that you want to remove, and choose **Delete**.

   Microsoft Outlook:

   a. Open the **Oracle UCM** menu and choose **Email Integration Settings...**.

      The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

   b. Choose **Edit Server List**.

      The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

   c. Select the server connection that you want to remove, and choose **Delete**.

   Lotus Notes:

   a. Open the **Actions** menu and choose **Email Integration Settings...**.

The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).

b. Choose **Edit Server List**.

The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

c. Select the server connection that you want to remove, and choose **Delete**.

2. Click **Yes** to confirm

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

7.10 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 setup 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.

7.11 Logging Off 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 Oracle Content Server 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 Oracle Content Servers hierarchy. When prompted, enter your user name and password. (Depending on the authentication setup 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.

7.12 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. See "Online vs. Offline Servers" on page 7-4 and "Local Caching of Content Files" on page 8-7 for more information.

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 7–2). 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 7–2 Offline Server Indicator

7.13 Searching a Content Server

You can search Oracle Content Server instances ("UCM servers") to find the file that you want to work with. You can do this directly from the integration hierarchy in Windows Explorer or your e-mail application (Microsoft Outlook or Lotus Notes).

> **Note:** You cannot search Content DB servers or other WebDAV servers. You must browse to files on these servers to select them.

The search results are displayed as a separate node in the integration hierarchy called "Search Results," so you can conveniently access the search results from your desktop without having to open the content server web browser interface. You can interact with content items in the Search Results node just as you could any other content item on the content server. For example, you can conveniently view, check in, and check out a content item in the folder (see Chapter 8, "Working With Content Folders and Files"). You can also view the content information page and make changes to the assigned metadata, if necessary.

The items in the search results list are the actual files (not a copy or pointer of some sort), and that is why you may see the content displayed in multiple places, such as in a contribution folder and in the search results list.

> **Caution:** The items in the search results list are the actual files (not a copy or pointer of some sort). If you delete a file from the search results list, you are removing the actual content item from the content server. Be careful when working with items in the search results list!

By default, search results only include content items contained within contribution folders. Your system administrator may configure the content server to search all content items, regardless of whether they are in contribution folders, so that all files on the content server are included when you search that server.

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 e-mail application session are shown. When you close the session by closing the window, the search results list is cleared.

Perform these steps to search a content server:

1. With any item in a server hierarchy selected, right-click and choose **Search...** in the context menu,

   or

   click the Search icon in the toolbar (Figure 7–3).

Figure 7–3 Search Icon

The Content Query Capture dialog is displayed (see "Content Query Capture Dialog" on page A-41). This screen is basically the standard Oracle Content Server search form.

2. Enter the search criteria in the form and click **Search**.

   The results are displayed in a node called Search Results under the associated content server in the integration hierarchy.

7.14 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 "Adding a Content Server Connection" on page 7-6), or you can modify this setting later:

1. In **Microsoft Word**, **PowerPoint**, and **Excel**, open the **Oracle UCM** menu or ribbon, and choose **Edit Server List...**.

   In **Microsoft Outlook**, open the **Oracle UCM** menu, then choose **Email Integration Settings...**, and then **Edit Server List**.

   In **Lotus Notes**, open the **Actions** menu, then choose **Email Integration Settings...**, and then **Edit Server List**.

   > **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 or your e-mail application.

   The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

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

   The Edit Server dialog is displayed (see "Edit Server Dialog" on page A-10).

3. Click **Options...**.

   The Server Options dialog is displayed (see "Server Options Dialog" on page A-5).

4. Open the **Remember Metadata Fields** tab (see "Server Options: Remember Metadata Fields" on page A-5), 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.

7.15 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 "Adding a Content Server Connection" on page 7-6), or you can modify it later:

1. In **Microsoft Word**, **PowerPoint**, and **Excel**, open the **Oracle UCM** menu or ribbon, and choose **Edit Server List...**.

   In **Microsoft Outlook**, open the **Oracle UCM** menu, then choose **Email Integration Settings...**, and then choose **Edit Server List**.

   In **Lotus Notes**, open the **Actions** menu, then choose **Email Integration Settings...**, and then choose **Edit Server List**.

   > **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 or your e-mail application.

   The Edit Server List dialog is displayed (see "Edit Server List Dialog" on page A-9).

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

   The Edit Server dialog is displayed (see "Edit Server Dialog" on page A-10).

3. Click **Options...**.

   The Server Options dialog is displayed (see "Server Options Dialog" on page A-5).

4. Open the **Authentication** tab (see "Server Options: Authentication" on page A-7), 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.

7.16 Identifying the URLs for Oracle 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). For Oracle Content Server instances ("UCM servers"), the **WebDAV URL** 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** typically is the same as the WebDAV URL, without '/webdav'. To find out what the CGI URL of an Oracle Content Server instance is, log in to that server using your web browser and look at the URL in the browser address bar. The CGI URL is the address from the beginning up to, but not including, the question mark (?), as shown in Figure 7–4.

Figure 7–4 CGI URL of Oracle Content Server

You can copy and paste this URL to the URL fields in the Add Server dialog (see "Add Server Dialog" on page A-2). Please note that 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.

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

8

Working With Content Folders and Files

This section covers these topics:

- "About Content Folders" on page 8-2
- "About Content Files" on page 8-5
- "Online and Offline Mode" on page 8-13
- "Creating Content Folders" on page 8-14
- "Creating New Content Files" on page 8-14
- "Modifying Existing Content Files" on page 8-15
- "Viewing Content Files" on page 8-16
- "Opening Content Files" on page 8-17
- "Checking Out Content Files" on page 8-18
- "Checking In Content Files" on page 8-21
- "Viewing and Modifying Content Folder and File Properties" on page 8-25
- "Renaming Content Folders and Files" on page 8-28
- "Copying Content Folders and Files" on page 8-29
- "Moving Content Folders and Files" on page 8-31
- "Deleting Content Folders and Files" on page 8-32
- "Propagating Folder Metadata" on page 8-33
- "Browsing to Content Files" on page 8-33
- "Searching for Content Files" on page 8-34
- "Working With Shortcuts to Content Folders and Files" on page 8-36
- "Copying Content File Links" on page 8-38
- "Enabling Metadata Prompting for Content Folders" on page 8-38
- "Working With Content Files in Workflows" on page 8-39
- "Working With Offline Content Folders and Files" on page 8-41

Note: See also Chapter 9, "Working With E-mail."

8.1 About Content Folders

Content folders offer a familiar, tree-like structure in Windows Explorer and supported e-mail applications (Microsoft Outlook and Lotus Notes) that provides convenient access to files on a content server, without having to use that server's own user interface (web-based or otherwise).

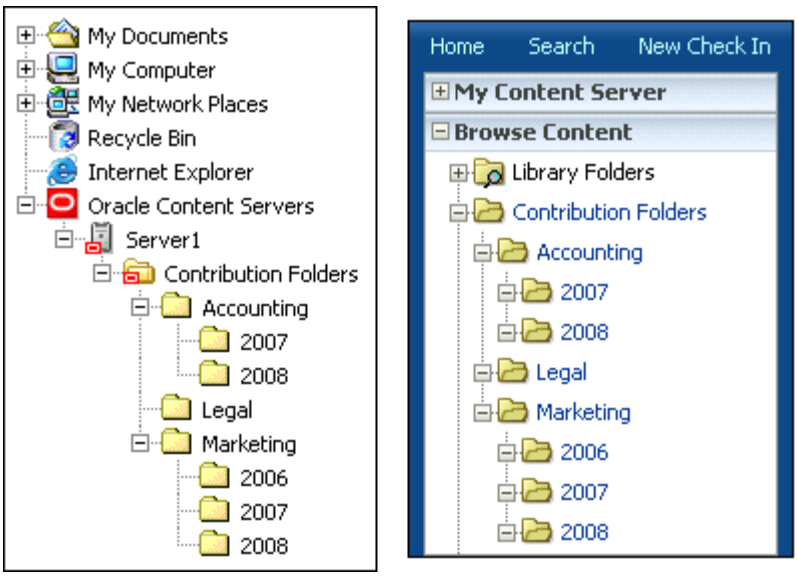
Oracle Content Server

On Oracle Content Server instances (that is, servers of type 'UCM Server'), content folders are shown under Contribution Folders or Content Server Folders in the server's integration hierarchy in Windows Explorer and your e-mail application. The node is called "Contribution Folders" for Oracle Content Server 11*g*R1 and "Content Server Folders" for Oracle Content Server 10*g*R3 and 7.5.2.

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 Contribution Folders or Content Server Folders node in the integration hierarchy.

The folder structure that you see under Contribution Folders or Content Server Folders is identical to that in the Oracle Content Server web interface (under 'Browse Content'), as illustrated in Figure 8–1. You only see folders and files for which you have access privileges.

Figure 8–1 Contribution Folders in Windows Explorer and Oracle 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 e-mail application. The folder structure that you see in the integration hierarchy is identical to that in Content DB's web interface or Oracle Drive. You only see folders and files for which you have access privileges.

Interacting With Content Folders and Files

You work with content folders and the files in them in much the same way as you do with other, local folders and files on your computer. You can copy and paste objects, drag and drop objects, right-click objects 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.

> **Note:** There is no access to administrative functions through the desktop integration interface. All administrative functions are performed through the Oracle Content Server web user interface.

The following sections provide more information about content folders:

- Content Folder Metadata Inheritance
- Content Folder Context Menus

8.1.1 Content Folder Metadata Inheritance

When you create a new content folder on an **Oracle Content Server** instance (that is, a server of type 'UCM Server'), 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 to apply a parent folder's metadata to all the subfolders and files in it.

8.1.2 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 content management options specific to Desktop Integration Suite. The context menu for folders may include any of the following options:

> **Note:** The list below only shows the context menu options specific to Desktop Integration Suite. Other options may be available, including options related to other Oracle content management products such as Oracle Universal Records Management (URM) or Oracle Information Rights Management (IRM). See the documentation of these products for more information on these options.

- **New Folder:** Enables you to create a new contribution 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 each selected contribution 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. See "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Refresh Offline Content:** Updates the offline file cache on your local computer to reflect the latest content of the corresponding contribution folder(s) or collaboration project(s) on the content server. See "Refreshing Offline Content" on page 8-42 for more information.
- **Remove Offline Content:** Deletes the content in each 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. See "Removing Offline Content" on page 8-43 for more information.
- **Search...** (UCM servers 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. See "Searching a Content Server" on page 7-11 for more information.
- **Propagate** (UCM servers only): Copies the metadata of each selected contribution folder or collaboration project to all subfolders and files in that folder or project. See "Content Folder Metadata Inheritance" on page 8-3 for more information.
- **Copy:** Copies each selected contribution 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.) See "Copying Content Folders and Files" on page 8-29 for more information.
- **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** (UCM servers only): Creates a shortcut to the selected contribution folder or collaboration project at the same folder or project level in the integration hierarchy. See "Working With Shortcuts to Content Folders and Files" on page 8-36 for more information.
- **Delete:** Removes the selected contribution 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.* See "Deleting Content Folders and Files" on page 8-32 for more information.
- **Rename:** Enables you to give the selected contribution folder or collaboration project in the integration hierarchy a new name. (You can also press the F2 key to do this.) See "Renaming Content Folders and Files" on page 8-28 for more information.
- **Content Information...** (UCM servers only): Displays the content information page on the server for the selected folder or project in the integration hierarchy. See "Viewing and Modifying Content Information of Folders or Files" on page 8-26 for more information.

- **Properties:** Displays a dialog that provides information about the selected folder or project in the integration hierarchy. See "Viewing and Modifying Properties of Folders or Files" on page 8-25 for more information.
- **Advanced Properties** (Content DB servers only): Displays a window that displays the properties about the selected folder in the integration hierarchy. See "Viewing and Modifying Advanced Properties of Folders or Files" on page 8-27 for more information.
- **Sharing** (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. See "Viewing and Modifying Sharing Properties of Folders or Files" on page 8-27 for more information.

8.2 About Content Files

Content files are files stored and managed on a content server. You work with content files in the integration hierarchy of a content server in much the same way as you do with other, local 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 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.

The following sections provide more information about content files:

- Content File Versioning
- Content File Metadata
- Local Caching of Content Files
- Content Management Actions on Files
- Content File Status
- Content File Context Menus

8.2.1 Content File Versioning

Oracle Content Server

Oracle Content Server can store multiple files of the same name as separate content items. However, in the integration of Oracle Content Server with Windows Explorer and e-mail 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 add 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 add 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 add *process2.doc* or *process.xls* 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 e-mail 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 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 e-mail client 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).

8.2.2 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 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 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 is used as the title.

Desktop Integration Suite can "remember" the metadata values used at check-in and automatically populate metadata fields each time you check in a new content item. See "Setting Metadata To Be Remembered for Form-Based Check-ins" on page 7-12 for more information.

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

1. **Folder**: When you add a file to a contribution folder on the server, that file inherits any default metadata values for the folder that have been set through Oracle 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. **E-mail**: 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 on the Content Information page (see "Viewing and Modifying Content Information of Folders or Files" on page 8-26).

> **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.

When you create a new folder, the metadata from the parent folder will populate the fields for the new folder. This allows the folder to initially "inherit" metadata, but allows 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.

8.2.3 Local Caching of Content Files

Desktop Integration Suite may use temporary copies of files 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\Stellent\SyndicationCache

where *USER* is the profile name of the current computer user (for example, jsmith). The 'SyndicationCache' directory stores all offline files associated with Desktop Integration Suite 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), and
- 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. See "Changing the Location of the Local File Cache" on page C-4 for more information.

8.2.4 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. See "Viewing Content Files" on page 8-16 for more information.
- **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. See "Opening Content Files" on page 8-17 for more information. (Please note that 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. See "Checking Out Content Files" on page 8-18 for more information.

  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. See "Checking In Content Files" on page 8-21 for more information.
- **Make 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. See "Working With Offline Content Folders and Files" on page 8-41 for more information.

Table 8–1 below provides a side-by-side comparison between these content management actions on files on a server.

Table 8–1 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)

Table 8–1 (Cont.) Content File Actions

Action	Checked Out of Content Server?	Available in Offline Cache [1]?	Opened in Associated Application?
Check Out	Yes [5]	Yes	No
Make 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. See "Local Caching of Content Files" on page 8-7 for more information.
2. Please note that 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.
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.

8.2.5 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 8–2 below lists the available status icons with their description. Please note that each of these status icons is an overlay of the application icon for the content item (see Figure 8–2 for an example of a Word application icon with a checked-out status icon).

Figure 8–2 Status Icon Overlaid on Top of Microsoft Word Application Icon

Table 8–2 Status Icons for Content Items

Icon	Description
	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. It is not always possible to obtain the user login information on content servers other than Oracle Content Server instances. Files that you have checked out yourself may then be marked as if someone else than you checked them out (showing the padlock icon; see below). Please note that all shortcuts to a checked-out file will also show this icon, since they are linked to the original file.
	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 made changes to your local copy and have not checked the item back in to the content server yet. The icon provides a visual reminder for this. Please note that all shortcuts to a checked-out file will also show this icon, since they are linked to the original file.
	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. 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.
	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. You can remedy this situation in either of two ways: ▪ 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.
	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. Please note that 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.

Table 8–2 (Cont.) Status Icons for Content Items

Icon	Description
	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. 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).

8.2.6 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 content management options specific to Desktop Integration Suite. The context menu for files may include any of the following options:

> **Note:** The list below only shows the context menu options specific to Desktop Integration Suite. Other options may be available, including options related to other Oracle content management products such as Oracle Universal Records Management (URM) or Oracle Information Rights Management (IRM). See the documentation of these products for more information on these options.

- **View:** Opens each selected file in its associated application in 'read-only' mode; that is, it is not checked out of the content server, and if you make any changes, you must check it in as a new content item. See "Viewing Content Files" on page 8-16 for more information.
- **Open:** Opens each 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. See "Opening Content Files" on page 8-17 for more information.
- **Check Out:** Retrieves each selected file from the content server and makes it available for editing. See "Checking Out Content Files" on page 8-18 for more information.
- **Undo Check Out:** Cancels the checked-out status of each selected file on the content server. See "Undoing a File Check-Out" on page 8-20 for more information.
- **Check In:** Uploads each 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. See "Checking In Content Files" on page 8-21 for more information.
- **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.
- **Make 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. See "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Approve:** Marks the current file in a workflow as approved and allows it to move to the next step in the workflow. You can approve files only if they are not currently checked out. See "Working With Content Files in Workflows" on page 8-39 for more information.
- **Reject:** Marks the current file in a workflow as rejected and returns it to the previous step in the workflow. You can reject files only if they are not currently checked out. See "Working With Content Files in Workflows" on page 8-39 for more information.
- **Copy:** Copies each selected file in the integration hierarchy into the copy-and-paste buffer. You can then create a copy of that file by pasting it to a different location. (You can also press the Ctrl+C key combination to do this.) See "Copying Content Folders and Files" on page 8-29 for more information.
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location.
- **Copy Links**: Copies the URL of each selected file in the integration hierarchy into the copy-and-paste buffer. You can then paste these URL(s) into any Windows application (for example, an e-mail message) to provide direct links to the file(s). See "Copying Content File Links" on page 8-38 for more information.
- **Create Shortcut** (UCM servers only): Creates a shortcut to each selected file in the same integration hierarchy folder as the referenced file or files. See "Working With Shortcuts to Content Folders and Files" on page 8-36 for more information.
- **Delete:** Removes each 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.* See "Deleting Content Folders and Files" on page 8-32 for more information.
- **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.) Please note that this option is not available when the file is currently checked out of the content server. See "Renaming Content Folders and Files" on page 8-28 for more information.
- **Content Information...** (UCM servers only): Displays the content information page on the server for the selected file in the integration hierarchy. See "Viewing and Modifying Content Information of Folders or Files" on page 8-26 for more information.
- **Properties:** Displays a dialog that provides information about the selected file in the integration hierarchy. See "Viewing and Modifying Properties of Folders or Files" on page 8-25 for more information.
- **Advanced Properties** (Content DB servers only): Displays a window that displays the properties about the selected file in the integration hierarchy. See "Viewing and Modifying Advanced Properties of Folders or Files" on page 8-27 for more information.

- **Sharing** (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. See "Viewing and Modifying Sharing Properties of Folders or Files" on page 8-27 for more information.

8.3 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 "Connecting to a Content Server" on page 7-10).

In **offline** mode, there are read-only copies of folders and files in a special cache location on your local computer (see "Local Caching of Content Files" on page 8-7). 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 "Working Offline" on page 8-43). 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 for a presentation you are giving while traveling. You can then obtain a copy of the current version of that report before you disconnect from the server and have read-only access to that file while working offline.

Note: If you check out an offline file, it is no longer read-only. You can make changes and check it back in.

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 **Make Available Offline** for files). Please note that 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 8–3), 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 8–3). In addition, the **Make Available Offline** option in the file context menu has a check mark.

Figure 8–3 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 in the content server.

See "Working With Offline Content Folders and Files" on page 8-41 for further details.

8.4 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:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
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. (For Oracle Content Server instances, you can add folders only under **Contribution Folders** or **Content Server Folders**).
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** (or **New Project** if you are adding a project folder).
6. Provide the name of the new folder and press `Enter`.
7. The new folder is created, and its folder information page is displayed in the preview pane. If you do not see this pane, turn it on (see "Showing or Hiding the Preview Pane" on page 6-17).

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. See "Viewing and Modifying Content Information of Folders or Files" on page 8-26 for more information.
- When you add files to the new folder, they inherit default metadata from the folder.

8.5 Creating New Content Files

Creating a new, managed content file 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:

Windows Explorer

- Copy and paste a file from your local computer to a folder on a content server. See "Copying Content Folders and Files" on page 8-29 for more information.
- Drag and drop a file from your local computer to a folder on a content server. See "Copying Content Folders and Files" on page 8-29 for more information.
- Move a file from your local computer to a folder on a content server. See "Moving Content Folders and Files" on page 8-31 for more information.

- Double-click an existing, unmanaged Office document on your local computer to open it in its associated Office application (for example, Word for .doc files), and then check it in to a server using the Save As New option in the Oracle UCM menu or ribbon. See "Opening Files in Windows Explorer or E-mail Applications" on page 8-18 and "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for more information.

> **Note:** A file is checked in to a folder on a server as a new content item only if that folder does not yet contain a file of 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). See "Content File Versioning" on page 8-5 for more information.

Microsoft Office

- Create a new document in an Office application and then check it in to a server using the Save As New option in the Oracle UCM menu or ribbon. See "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for more information.
- Open an existing, unmanaged document on your local computer in an Office application and then check it in to a server using the Save As New option in the Oracle UCM menu or ribbon. See "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for more information.
- Open an existing Office document on a server in your Office application (using the Oracle UCM menu or ribbon), modify it as needed, and then check it in to a server as a new content item using the Save As New option in the Oracle UCM menu or ribbon.

E-mail Application

- Copy and paste an e-mail from your e-mail application to a folder on a content server. See "Checking In E-mail" on page 9-3 for more information.
- Drag and drop an e-mail from your e-mail application to a folder on a content server. See "Checking In E-mail" on page 9-3 for more information.

> **Note:** E-mails are always copied intact; the attachment handling options have no effect except when using the Check In Mail Item toolbar button or menu item.

8.6 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 the offline cache on your computer (see "Local Caching of Content Files" on page 8-7). 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"). See "Checking Out Content Files" on page 8-18 for more information. 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.

There are various ways to modify an existing content file and check it back in to a server:

Windows Explorer

- Browse to, or search for, an existing file on a content server, check it out (using the context menu), modify it as needed, and then check it back in to the server as a new revision (again, using the context menu). See "Checking Out Files in Windows Explorer or E-mail Applications" on page 8-19 and "Checking In Files in Windows Explorer" on page 8-21 for more information.

Microsoft Office

- Open an existing Office document on a server in your Office application (using the Oracle UCM menu or ribbon), modify it as needed, and then check it in to a server as a new revision using the Check In or Check In With Metadata option in the Oracle UCM menu or ribbon. You are also given the opportunity to check in the file as a new revision when you close the document or exit the Office application. See "Checking Out Files in Microsoft Office Applications" on page 8-19 and "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for more information.

E-mail Application

- Checked-in e-mail messages are not intended to be checked out, modified, and checked back in. E-mail 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 e-mail message from a server to view it in its associated e-mail 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. See "Opening Checked-In E-mail Messages" on page 9-10 for more information.

8.7 Viewing Content Files

When you view a content file on a server, it remains checked in to the content server and a temporary copy is placed on your computer. 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.

The process to view a file on a content server depends on the application that you are using:

- Viewing Files in Windows Explorer or E-mail Applications
- Viewing Files in Microsoft Office Applications

Note: See "Content Management Actions on Files" on page 8-8 for a side-by-side comparison of viewing, opening, and checking out content files.

8.7.1 Viewing Files in Windows Explorer or E-mail Applications

Perform these steps to view a file in Windows Explorer or your e-mail application:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

3. Click the server which stores the file you want to view. If prompted, log in by entering your user name and password for that server.
4. Select the file in the integration hierarchy that you want to view.
5. Right-click and choose **View**, or double-click the file.

   The file opens in the application associated with its file type (for example, Microsoft Word for a .doc file).

> **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'). See "Setting Advanced Windows Explorer Integration Options" on page C-1 for more information.

8.7.2 Viewing Files in Microsoft Office Applications

Perform these steps to view a file in a Microsoft Office application:

1. Start Microsoft Word, PowerPoint, or Excel (depending on what type of file you want to view).
2. Open the **Oracle UCM** menu or ribbon, and then choose **Open...**.

   The Select Content dialog is displayed (see "Select Content Dialog" on page A-17).
3. Select the **View** option in the bottom right corner of the dialog (this is not the default).
4. Browse to, or search for, the Office document that you want to view, and select it. Make sure that you select a file that is compatible with the current Office application (for example, a word-processing document for Microsoft Word).
5. Click **OK**.

   The file opens in the Office application.

8.8 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 the offline cache on your computer (see "Local Caching of Content Files" on page 8-7). 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 process to open a file on a content server depends on the application that you are using:

- Opening Files in Windows Explorer or E-mail Applications
- Opening Files in Microsoft Office Applications

> **Note:** See "Content Management Actions on Files" on page 8-8 for a side-by-side comparison of viewing, opening, and checking out content files.

8.8.1 Opening Files in Windows Explorer or E-mail Applications

Perform these steps to open a file in Windows Explorer or your e-mail application:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the file you want to open. If prompted, log in by entering your user name and password for that server.
4. Select the file in the integration hierarchy that you want to open.
5. Right-click and choose **Open**.

   The file opens in the application associated with its file type (for example, Microsoft Word for a .doc file) in fully edit mode. You can modify the file as required, and check it back in to the server when you are ready (see "Checking In Files in Windows Explorer" on page 8-21 for more information).

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'). See "Setting Advanced Windows Explorer Integration Options" on page C-1 for more information.

8.8.2 Opening Files in Microsoft Office Applications

Perform these steps to open a file in a Microsoft Office application:

1. Start Microsoft Word, PowerPoint, or Excel (depending on what type of file you want to open).
2. Open the **Oracle UCM** menu or ribbon, and then choose **Open...**.

   The Select Content dialog is displayed (see "Select Content Dialog" on page A-17).
3. Select the **Open** option in the bottom right corner of the dialog (this is the default).
4. Browse to, or search for, the Office document that you want to open, and select it. Make sure that you select a file that is compatible with the current Office application (for example, a word-processing document for Microsoft Word).
5. Click **OK**.

   The file opens in the Office application. You can modify the file as required, and check it back in to the server when you are ready (see "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for more information).

8.9 Checking Out Content Files

When you check out a file from a content server, the file is retrieved from the server and a copy is placed in the offline cache on your computer (see "Local Caching of Content Files" on page 8-7). 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 or your e-mail application, 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 "Checking In Files in Windows Explorer" on page 8-21). 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 8–4).

Figure 8–4 Checked-out Word Document

In Microsoft Office applications, a content file on a server is automatically checked out when you open it using the Oracle UCM menu or ribbon. When you close the document or exit the application, you are given the opportunity to check the file back in to the server (see "Saving and Checking In Files in Microsoft Office Applications" on page 8-23).

> **Note:** See "Content Management Actions on Files" on page 8-8 for a side-by-side comparison of viewing, opening, and checking out content files.

The following sections provide more information about checking out files:

- Checking Out Files in Windows Explorer or E-mail Applications
- Checking Out Files in Microsoft Office Applications
- Undoing a File Check-Out
- Viewing All Your Checked-Out Files

8.9.1 Checking Out Files in Windows Explorer or E-mail Applications

Perform these steps to check out a file in Windows Explorer or your e-mail application:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the file you want to check out. If prompted, log in by entering your user name and password for that server.
4. Select the file in the integration hierarchy that you want to check out.
5. Right-click and choose **Check Out**. (This option is 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 use the Offline Content Manager to manage your checked-out files.

8.9.2 Checking Out Files in Microsoft Office Applications

When you open a file in a Microsoft Office application, it is automatically checked out of the content server. See "Opening Files in Microsoft Office Applications" on page 8-18 for further details. When you close the document or exit the Office application, you are

given the opportunity to check the file back in to the server. See "Saving and Checking In Files in Microsoft Office Applications" on page 8-23 for further details.

8.9.3 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. Only a server administrator and the user who checked out a file can undo the check-out.

Perform these steps to undo the check-out of a file on a content server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which 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. Select the file in the integration hierarchy whose check-out you want to undo.
5. Right-click and choose **Undo Check Out**. (This option is 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.

8.9.4 Viewing All Your Checked-Out Files

You can view all files that you have currently checked out of an Oracle Content Server instance ("UCM server") 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 an Oracle Content Server 11*g* instance.

Perform these steps to see a list of all your checked-out files on a content server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
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. Click the **My Checked-Out Content** node. (If the server does not have a node called My Checked-Out Content, then it is not an Oracle Content Server 11*g* instance.)

   The content pane lists all files that you have currently checked out on the current content server. Please note that all items show a green check mark in their icons to indicate their checked-out status (Figure 8–5).

Figure 8–5 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**.

8.10 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 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 overwrites the existing file on the server.

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.

There are various ways in which you can check a file in to the server, depending on the file status and the application that you are using:

- Checking In Files in Windows Explorer
- Saving and Checking In Files in Microsoft Office Applications

> **Note:** See "Checking In E-mail" on page 9-3 for more information on checking in e-mail messages and their attachments.

8.10.1 Checking In Files in Windows Explorer

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

Perform these steps to check in a file that was previously checked out (see "Checking Out Files in Windows Explorer or E-mail Applications" on page 8-19):

1. Open Windows Explorer, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node.
3. Click the server which stores the checked-out file you want to check back in. If prompted, log in by entering your user name and password for that server.
4. Select the checked-out file in the integration hierarchy that you want to check back in to the server. 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 Content Server instance by clicking the **My Checked-Out Content** node. You can check files in to the server from that list.
5. Right-click and choose **Check In**. (This option is available only if the selected file is currently checked out.)

The file is uploaded 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.

Note: You can also check a currently checked-out file back in to the server using the Offline Content Manager.

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 folder on a content server. See "Copying Content Folders and Files" on page 8-29 for more information.
- By dragging and dropping a file to a folder on a content server. See "Copying Content Folders and Files" on page 8-29 for more information.
- By moving a file to a folder on a content server. See "Moving Content Folders and Files" on page 8-31 for more information.

Note: If Universal Records Management (URM) is installed on Oracle 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 contribution 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 contribution folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured URM to enable such check-ins.

Considerations

- When you check in an existing file on an Oracle Content Server instance ("UCM server"), 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 folder on a content server, it is checked in to that server as a new content item only if the folder does not yet contain a file of 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). See "Content File Versioning" on page 8-5 for more information.
- When you drag and drop or copy and paste a new file into a content folder on an Oracle Content Server instance, you may be asked to provide metadata for the file, depending on the settings for that content folder (see "Enabling Metadata Prompting for Content Folders" on page 8-38). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the content folder (see "Content File Metadata" on page 8-6).

8.10.2 Saving and Checking In Files in Microsoft Office Applications

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

Saving and Checking In Existing Documents

Perform these steps to check in an Office document that was previously checked out (see "Checking Out Files in Microsoft Office Applications" on page 8-19):

1. Open an existing Office document on a content server in the Microsoft Office application, either from Windows Explorer or the Office application. See "Opening Content Files" on page 8-17 for more information.
2. Make changes to the document as required.
3. When you are ready to check the document back in to the server, open the Oracle UCM menu or ribbon, and choose **Check In**. The document is uploaded to the content server and checked back in, inheriting all metadata of the previous revision. (If you had any unsaved changes in your document, these were saved before the check-in.)

   You can also choose **Check In With Metadata...** in the Oracle UCM menu or ribbon. This opens a dialog where you can modify the metadata of the content item before checking it in to the server (see "Check In Content Dialog (Check In With Metadata)" on page A-27).

   After the check-in, the document is closed automatically.

Alternatively, you can also simply close the document or exit the application. A dialog is then displayed providing some save options for the current document (see "Check In Document Dialog" on page A-34 and "Save Changes and Check In Document Dialog" on page A-36, depending on whether the document currently has any unsaved changes). The table below lists all possible save scenarios for these dialogs, with an explanation of what happens for each of them.

> **Note:** The Save Changes option is provided only if your document currently has any unsaved changes. Also, if the document is currently in a workflow on Oracle Content Server, then the dialog includes an option called 'Document is ready for further workflow processing'. Select this option when you are ready reviewing the document and want to move the document to the next workflow step after checking it back in to the server. Please note that you still need to approve the file in the integration hierarchy before it actually moves to the next workflow step (see "Approving or Rejecting Files in Workflows" on page 8-40).

Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Yes	Yes	No	n/a	Any unsaved changes to the file are saved, and the file 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 file has been checked in to the content server, it is closed in the Microsoft Office application.

Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Yes	Yes	Yes	n/a	Any unsaved changes to the file 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 file has been checked in to the content server, it is closed in the Microsoft Office application.
Yes	No	n/a	n/a	Any unsaved changes to the file are saved, but the file is not checked in to the content server. This means that other users on the server cannot check out the file until you check it back in or undo the check-out. The file is stored in a special cache on your local computer (see "Local Caching of Content Files" on page 8-7). You can reopen the file from the Select Content dialog (see "Select Content: Offline Files" on page A-22) After the file has been saved to the local cache, it is closed in the Microsoft Office application. 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).
No	No	n/a	No	The changes to the file are discarded and the file is not checked in to the content server. This means that other users on the server cannot check out the file until you check it back in or undo the check-out. The file is stored in a special cache on your local computer (see "Local Caching of Content Files" on page 8-7). You can open the file from the Select Content dialog (see "Select Content: Offline Files" on page A-22) After the file has been saved to the local cache, it is closed in the Microsoft Office application.
No	No	n/a	Yes	Any changes to the file are discarded and the file 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.

Saving and Checking In New Documents

If you create a new document or open an unmanaged document from your local computer 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.

Perform these steps to check in an Office document that is not yet managed on a content server:

1. Open an existing, unmanaged Office document on your local computer 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 Oracle UCM menu or ribbon, and choose **Save As New...**.

   The Save dialog is displayed (see "Save Dialog (Save As New)" on page A-23).
3. You can check in the document in either of two ways:
   - by using a check-in form (Oracle Content Server instances only), or
   - by selecting a folder on a server where the document should be saved.

   See "Save: Check-in Form" on page A-23 and "Save: Folder" on page A-25 for more information.

   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 the user's assigned access privileges.

8.11 Viewing and Modifying Content Folder and File Properties

You can view the properties of a content folder or file and modify a number of them, if desired:

- "Viewing and Modifying Properties of Folders or Files" on page 8-25
- "Viewing and Modifying Content Information of Folders or Files" on page 8-26
- "Viewing and Modifying Advanced Properties of Folders or Files" on page 8-27
- "Viewing and Modifying Sharing Properties of Folders or Files" on page 8-27

8.11.1 Viewing and Modifying Properties of Folders or Files

Perform these steps to view some Windows properties of a content folder or file:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the folder or file whose properties you want to view. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy whose properties you want to view.
5. Right-click and choose **Properties**.

   The Folder Properties dialog or Content Item Properties dialog is displayed. See "Folder Properties Dialog" on page A-13 and "Content Item Properties Dialog" on page A-39 for more information. 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. Please note that 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.

8.11.2 Viewing and Modifying Content Information of Folders or Files

You can view the content information of folders and files on an Oracle Content Server instance ("UCM server"). This enables you to see their assigned metadata and other content management properties (and modify them, if required). Please note that you may not be able to update metadata, depending on your security privileges on the content server. Only administrators and the "owner" of a folder or file can edit its metadata. The owner is typically the person who created the folder or checked in the file.

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

Perform these steps to view the content information of a folder or file on an Oracle Content Server instance:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the Oracle Content Server instance which stores the folder or file whose content information you want to view. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy whose content information you want to view.
5. The preview pane, if enabled, displays the content information of the selected folder or file. If the preview pane is not visible, you can enable it (see "Showing or Hiding the Preview Pane" on page 6-17). You can also right-click the folder or file and choose **Content Information** to open the information page in a separate window.
6. The information page shows the metadata that is assigned to the selected folder or file on the content server (for example, its owner, metadata prompt setting, content type, security group, and so on).

   See the *Oracle Fusion Middleware User's Guide for Content Server* for more information on content information (metadata).
7. The bar at the top of the page shows the available actions for the content folder and file. To edit any of the metadata, do either of the following:
   - For folders, open the **Folder Actions** menu and then choose **Update**.
   - For files, open the **Content Actions** menu and then choose **Update**.
8. After you update any of the metadata, click **Submit Update** to save the changes. The changes take effect immediately.

Caution: Be careful when changing the security group of a 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.

8.11.3 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 Content Server instances or other, non-Content DB WebDAV servers.

Perform these steps to view the advanced Content DB properties of a folder or file on an Oracle Content Database server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the Oracle Content Database server which stores the folder or file whose advanced properties you want to view. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy whose advanced properties you want to view.
5. Right-click and choose **Advanced Properties**.

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

8.11.4 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 Content Server instances or other, non-Content DB WebDAV servers.

Perform these steps to view the sharing Content DB properties of a folder or file on an Oracle Content Database server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

3. Click the Oracle Content Database server which stores the folder or file whose sharing properties you want to view. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy whose advanced properties you want to view.
5. Right-click and choose **Sharing**.

   A content information window opens showing sharing Content DB 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.

8.12 Renaming Content Folders and Files

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

Renaming Folders and Files Directly in the Integration Hierarchy

Perform these steps to rename a content folder or file from the integration hierarchy:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the folder or file you want to rename. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy that you want to rename.
5. Right-click and choose **Rename** or press `F2` on your keyboard.
6. Provide the new name of the folder or file, and press `Enter`.

Renaming Folders and Files From the Properties Dialog

Perform these steps to rename a content folder or file from its properties dialog:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the folder or file you want to rename. If prompted, log in by entering your user name and password for that server.
4. Select the folder or file in the integration hierarchy that you want to rename.
5. Right-click and choose **Properties**.

   The Folder Properties dialog or File Properties dialog is displayed. See "Folder Properties Dialog" on page A-13 and "Content Item Properties Dialog" on page A-39 for more information.
6. Provide the new name of the folder or file, and click **OK**.

Renaming Folders on Their Information Page

Perform these steps to rename a content folder from its information page:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server which stores the folder you want to rename. If prompted, log in by entering your user name and password for that server.
4. Select the folder in the integration hierarchy that you want to rename.

   The information page of the selected folder is displayed in the preview pane.
5. Click the **Folder Actions** menu and choose **Update**.
6. Provide the new folder name in the **Virtual Folder Name** field.
7. Click **Submit Update** at the bottom of the folder information page.

Considerations

- When you rename a content folder on your local computer, this is reflected on the content server (and vice versa).
- You cannot rename a file if it is currently checked out of the content server.
- On Oracle 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 the reflect the new file name (or vice versa).
- If you rename a content folder or file, the names of any shortcuts to the folder or file are not updated automatically.

8.13 Copying Content 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 folders or files to be copied, you can use all standard Windows methods of copying and pasting items:

- 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. (Please note that this is supported only in Windows Explorer, not in e-mail applications.)
- Drag and drop the selected folders and/or files to the target location.

Please note the following:

- 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.

- If Universal Records Management (URM) is installed on Oracle 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 contribution 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 contribution folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured URM to allow such check-ins.

Copying Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows 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 is displayed where you can provide metadata for the files before checking them in. See "Check In Content Dialog (Drag and Drop)" on page A-31 for more information.

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.

Note: If you copied Microsoft Office documents, you may be able to check them back in to their originating Oracle 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 Oracle UCM menu or ribbon in the Office application. See "Microsoft Office Document Properties" on page 4-5 for more information.

- **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). Please note that 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 destination folder (see "Hierarchical Folder Information Page" on page A-14).
- **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 exist 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 Content Server 11*g* instance and metadata prompting has been enabled for the folder (see "Hierarchical Folder Information Page" on page A-14). You are also prompted for metadata if any required metadata is missing. The default metadata values in the check-in form will be the ones specified for the content folder that the file was copied into.

8.14 Moving Content Folders and Files

You can move items to a content server in much the same way as other files on your computer. After selecting the 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. (Please note that this is supported only in Windows Explorer, not in e-mail applications.)
- Drag and drop the selected folders and/or files to the target location within the integration hierarchy.

Please note the following:

- If Universal Records Management (URM) is installed on Oracle Content Server with its DoD compliance features enabled, then you may not be able to check in files by cutting and pasting them into contribution 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 contribution folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured URM to enable such check-ins.

Moving Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows 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 Content Server 11*g* instance and metadata prompting has been enabled for the folder. You are also prompted for metadata if any required metadata is missing. See "Check In Content Dialog (Drag and Drop)" on page A-31 for more information.

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.

8.15 Deleting Content 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 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. (Please note that this is supported only in Windows Explorer, not in e-mail applications.)

Considerations

- You should be very careful deleting a folder. If you delete one, all subfolders and all revisions of all content items in that folder may also be deleted, which might affect everyone who uses that content server.
- When you delete a folder or a content item, it may be permanently deleted or moved to a Trash folder, depending on how this was set up on the content server. See the *Oracle Fusion Middleware User's Guide for Content Server* for more information.
- To delete a content item, you must have Delete (D) permission for the security group of that content item.
- To delete a folder, you must be the owner of the folder or have Delete (D) permission for the folder's security group, and you must have Delete (D) permission for the security groups of all subfolders and content items within the folder.

- If you have permission to delete a folder, the folder and 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 folder will be retained.
- You cannot delete the main nodes of an Oracle Content Server instance (such as Contribution Folders, Content Server Folders, My Checked-Out Content, and so on).

8.16 Propagating Folder Metadata

You can copy the metadata of a contribution folder on an Oracle Content Server instance to all subfolders and files in these folders. This feature is available only if the content server administrator has enabled it on the server and if you have the required permission level.

The content ID and title of items are always considered properties specific to those items and are never automatically propagated. Also, a folder can be excluded from metadata propagation from a higher-level folder by setting its Inhibit Propagation property on the Hierarchical Folder Configuration page to 'True' (see "Hierarchical Folder Information Page" on page A-14).

Perform these steps to propagate the metadata of a folder to all underlying folders and files:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the Oracle Content Server instance which stores the 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 folder in the integration hierarchy whose metadata you want to propagate.
5. Choose **Propagate**.

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

> **Note:** You can also propagate metadata from a folder's configuration page (see "Viewing and Modifying Content Information of Folders or Files" on page 8-26).

8.17 Browsing to Content Files

You can browse to a file on a content server and select it further use. When browsing to a file, you navigate to it by moving down a tree structure of folders on the server until you have located the file you want to work with.

Windows Explorer and E-mail Applications

Perform these steps to browse to a content file on a server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the server whose folders tree you want to browse. If prompted, log in by entering your user name and password for that server.
4. Move down the folders tree and select the file you want to work with.

> **Note:** 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.

Microsoft Office Applications

Perform these steps to browse to a content file on a server:

1. Start Microsoft Word, PowerPoint, or Excel (depending on what type of file you want to open).
2. Open the **Oracle UCM** menu or ribbon, and then choose **Open...**.

   The Select Content dialog is displayed (see "Select Content Dialog" on page A-17).
3. Open the **Browse** panel (see "Select Content: Browse" on page A-20).
4. Click the server whose folders tree you want to browse. If prompted, log in by entering your user name and password for that server.
5. Move down the folders tree and select the file you want to open in the Office application.

8.18 Searching for Content Files

You can search for a file on an Oracle Content Server instance and select it for further use. You search for files using a standard content server search form where you specify the search criteria that files should meet. You can then select a file in the search results list.

> **Note:** This is not available on Oracle Content Database servers or other WebDAV servers.

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 searching for files on the content server, see the Oracle Content Server documentation.

Windows Explorer and E-mail Applications

Perform these steps to search for content files on a server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).

3. Click the server whose content you want to search. If prompted, log in by entering your user name and password for that server.
4. With any item in the server hierarchy selected, right-click and choose **Search...** in the context menu,

   or

   click the Search icon in the toolbar (Figure 8–6).

Figure 8–6 Search Icon

   The Content Query Capture dialog is displayed (see "Content Query Capture Dialog" on page A-41). This screen is basically the standard Oracle Content Server search form.
5. Enter the search criteria in the form and click **Search**.

   The Search Results node for the content server lists all files on the server that meet the specified criteria. You can select the file in the list you want to work with.

> **Note:** 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.

> **Caution:** The items in the search results list are the actual files (not a copy or pointer of some sort). If you delete a file from the search results list, you are removing the actual content item from the content server. Be careful when working with items in the search results list!

Microsoft Office Applications

Perform these steps to search for content files on a server:

1. Start Microsoft Word, PowerPoint, or Excel (depending on what type of file you want to open).
2. Open the **Oracle UCM** menu or ribbon, and then choose **Open...**.

   The Select Content dialog is displayed (see "Select Content Dialog" on page A-17).
3. Open the **Search** panel (see "Select Content: Search" on page A-17).
4. Click the server you want to search. If prompted, log in by entering your user name and password for that server.

> **Note:** You will see only Oracle Content Server instances in the list of available servers, not any Oracle Content Database servers or other WebDAV servers.

5. Specify whether you want to edit (open) or view the content item. See "Content Management Actions on Files" on page 8-8 for an explanation of the differences between opening and viewing content files.
6. Enter the search criteria in the search form and click **Search** when you are done.

7. The search results list is displayed, showing all files on the server that meet the specified criteria. Click the **Select** button next to the file you want to open in the Office application.

8.19 Working With Shortcuts to Content Folders and Files

This section covers the following topics:

- "About Content Folder and File Shortcuts" on page 8-36
- "Creating Content Folder and File Shortcuts" on page 8-37
- "Copying Content Folder and File Shortcuts" on page 8-37
- "Deleting Content Folder and File Shortcuts" on page 8-38

8.19.1 About Content Folder and File Shortcuts

You can create shortcuts to 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 Content Server shortcuts
- standard Windows shortcuts

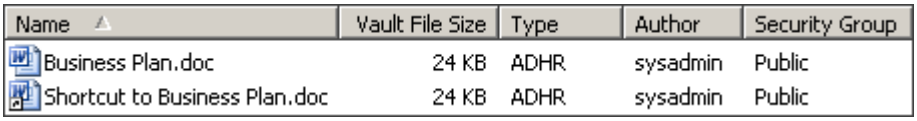
You create these shortcuts in different ways and they behave slightly differently.

Oracle Content Server Shortcuts

Unlike standard Windows shortcuts, Oracle 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 content folder or file 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 "Content File Status" on page 8-9).

If you create a shortcut to a content folder or file in the integration hierarchy, its name is the original folder or file name preceded by "Shortcut to," for example "Shortcut to Business Plan.doc." In addition, the shortcut icon shows a small arrow to indicate it is a reference to another item (Figure 8–7). 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 Copying Content Folder and File Shortcuts below). Please note that if you copy the shortcut to a location outside the Oracle Content Server hierarchy (for example, to your desktop), the file or folder 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 8–7 Original File With Shortcut



When you double-click a shortcut to a content 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 "Viewing Files in Windows Explorer or E-mail Applications" on page 8-16).

If you hover the mouse cursor over an Oracle 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 Content Server shortcuts, you can also create standard Windows shortcuts to content 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 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.

8.19.2 Creating Content Folder and File Shortcuts

There are different ways to create a shortcut to a content folder or file:

- Select a folder or file on a content server, right-click, and then choose **Create Shortcut**. This creates an Oracle Content Server shortcut in the same location as the original item (preceded by "Shortcut to").
- Select a folder or file on a content server, then open the **File** menu, and then choose **Create Shortcut**. This creates an Oracle Content Server shortcut in the same location as the original item (preceded by "Shortcut to").
- Select a folder or file on a content server for copying. Then, at a location outside the Oracle Content Server hierarchy (for example, your desktop), right-click and choose **Paste Shortcut**. This creates a standard Windows shortcut that points to the URL of the referenced item.

8.19.3 Renaming Content Folder and File Shortcuts

You can rename shortcuts to content folders and files on a server in much the same way as other folders and files on your computer. Select the shortcut and press `F2`, or right-click and choose **Rename**. Please note that renaming a shortcut does not affect the name of the original file and vice versa.

8.19.4 Copying Content Folder and File Shortcuts

You can copy and paste shortcuts to content folders and files on a server in much the same way as other files on your computer. After selecting the shortcut to be copied, you can use all 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. (Please note that this is supported only in Windows Explorer, not in e-mail applications.)

- Drag and drop the selected folders and/or files to the target location.

Please note that if you copy an Oracle Content Server shortcut to a location outside the Oracle 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.

8.19.5 Deleting Content Folder and File Shortcuts

You can delete a shortcut to a content folder or file in much the same way as other items on your computer. After selecting the shortcut to be deleted, you can use all standard Windows methods of deleting it:

- Right-click and choose **Delete**.
- Press `Delete` on your keyboard.
- Choose **Delete** from the **File** menu. (Please note that this is supported only in Windows Explorer, not in e-mail 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.

8.20 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 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. The link information is copied into the Windows clipboard, so that you can easily paste it into another file or application.

8.21 Enabling Metadata Prompting for Content Folders

When you drag and drop, copy and paste, or save a new file to a contribution folder on an Oracle Content Server 11*g*R1 instance, you may be asked to provide metadata for that file before it is checked in to the server. This only happens if the contribution folder was specifically configured to enable metadata prompting. If metadata prompting is not enabled for a folder, new files in that folder will always inherit the default metadata values for the folder as set through Oracle Content Server's web interface. Please note that if a required field does not have a default value assigned to it, you will always be prompted to provide metadata, even if the "Enable Metadata Prompts" option is disabled. See "Content File Metadata" on page 8-6 for more information on metadata inheritance.

Perform these steps to enable metadata prompting for a contribution folder on Oracle Content Server 11*g*R1:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).

2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
3. Click the Oracle Content Server instance which stores the 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 folder in the integration hierarchy for which you want to enable metadata prompting.
5. 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 "Showing or Hiding the Preview Pane" on page 6-17). You can also right-click the folder and choose **Content Information** to open the information page in a separate window.
6. The information page shows the metadata that is assigned to the selected folder on the content server (for example, its owner, metadata prompt setting, content type, security group, and so on).

   See the *Oracle Fusion Middleware User's Guide for Content Server* for more information on content information (metadata).
7. The bar at the top of the page shows the available actions for the content folder. To edit the metadata prompting setting, open the **Folder Actions** menu and then choose **Update**.

   The Hierarchy Folder Configuration page is displayed (see "Hierarchical Folder Information Page" on page A-14).
8. Make sure that the **Enable Metadata Prompts** check box is selected.
9. When you are done, click **Submit Update** to save the changes. The changes take effect immediately.

8.22 Working With Content Files in Workflows

Workflows on Oracle Content Server instances specify how content is routed for review and approval before it is released to the system. Users on the server do not have access to a file while it is in a workflow. If you have been designated as a reviewer for a file, you are notified by e-mail when you have a file to review.

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

When working with files in workflows, you can do the following:

- "Viewing All Your Workflow Assignments" on page 8-39
- "Approving or Rejecting Files in Workflows" on page 8-40

8.22.1 Viewing All Your Workflow Assignments

You can view all your current workflow assignments for an Oracle Content Server instance ("UCM server") in one convenient list in Windows Explorer or your e-mail application. This list shows all files currently in a workflow that you are assigned to review. You can approve or reject the files.

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

Perform these steps to see a list of all your current workflow assignments on a content server:

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible (see "Showing or Hiding the Folders Pane" on page 6-17).
2. Expand the **Oracle Content Servers** node. If you do not see this node in your e-mail application, enable it first (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8).
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. Click the **My Workflow Assignments** node. (If the server does not have a node called My Workflow Assignments, then it is not an Oracle Content Server 11*g* instance.)

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

8.22.2 Approving or Rejecting Files in Workflows

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

Reviewing Microsoft Office Documents

Perform these steps to approve or reject a Microsoft Office document in a workflow:

1. Open the **My Workflow Assignments** node on the Oracle Content Server instance which stores the workflow items you need to review (see 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 e-mail notification that you should review a content item on the server.)
2. Open the document to be reviewed in its associated Office application, either by double-clicking it in Windows Explorer or using the Oracle UCM menu or ribbon in the Office application (see "Opening Files in Microsoft Office Applications" on page 8-18).
3. 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 only review the file, but not make any changes and check in the file as a new revision.
4. When you are done reviewing the file and making changes (if allowed and where required), close the file or exit the application.

   A dialog is displayed asking what you want to do with the file (see "Saving and Checking In Files in Microsoft Office Applications" on page 8-23). If you are completely done reviewing the file and are ready to approve or reject it, make sure that you select the **Document is ready for further workflow processing** check box. This checks the file in to the server as a new revision and moves it from the Edit to the GenWWW state on the server, making it ready to go to the next step in

the workflow. If you do not select this check box, the file is checked in to the content server as a new revision, but remains in the current workflow step, enabling you to retain ownership of the file. (The file remains in Edit mode and does not move to the GenWWW state.) You can then complete your review at a later time.

5. When you are ready to approve or reject the file, select it in the **My Workflow Assignments** node, right-click, and choose **Accept** or **Reject**.

   If you choose **Accept**, the file moves to the next step in the workflow.

   If you choose **Reject**, a dialog is displayed 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 e-mail notification, so they can edit the file and submit it for review again.

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

8.23 Working With Offline Content Folders and Files

This section covers these topics:

- "About Offline Folders and Files" on page 8-41
- "Making Folders and Files Available Offline" on page 8-42
- "Viewing Offline Files" on page 8-42
- "Refreshing Offline Content" on page 8-42
- "Removing Offline Content" on page 8-43
- "Working Offline" on page 8-43

8.23.1 About Offline Folders and Files

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 "Local Caching of Content Files" on page 8-7). 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 "Working Offline" on page 8-43). 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 for a presentation you are giving while traveling. You can then obtain a copy of the current version of that report before you disconnect from the server and have read-only access to that file while working offline.

> **Note:** If you check out an offline file, it is no longer read-only. You can make changes and check it back in.

Files that are available offline show a cylinder in their file icon, which can be either blue or gray (Figure 8–8). In addition, the **Make Available Offline** option in the file context menu has a check mark.

Figure 8–8 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 in the content server.

8.23.2 Making Folders and Files Available Offline

Perform these steps to make files and folders available for offline use:

1. Open Windows Explorer and expand the **Oracle Content Servers** node.
2. Click the content server which 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 **Make Available Offline** (for files). The selected files are now available in offline server mode.

Please note that 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 8–8), 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.

8.23.3 Viewing Offline Files

Perform these steps to view an offline file:

1. Open Windows Explorer and expand the **Oracle Content Servers** node.
2. Click the content server which stores the file(s) or folder(s) that you want to view. 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 view.
4. Right-click and choose **View**. The selected file is now opened in its associated application in read-only mode. See "Viewing Content Files" on page 8-16 for more information.

8.23.4 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 8–8). You can refresh offline files, so they are updated to their latest released revisions on the content server.

Please note that 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.

Perform these steps to refresh offline files:

1. Open Windows Explorer and expand the **Oracle Content Servers** node.
2. Click the content server which 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.

8.23.5 Removing Offline Content

Perform these steps to remove an offline file or folder, so they are no longer available offline:

1. Open Windows Explorer and expand the **Oracle Content Servers** node.
2. Click the content server which 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. Please note that this does not affect the original files and folders on the content server; they remain available.

8.23.6 Working Offline

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.

Note: Before going offline, you may want to refresh your local offline content to ensure you have the most recent file copies on your computer. See "Refreshing Offline Content" on page 8-42 for more information.

Perform these steps to work with a content server in offline mode:

1. Open Windows Explorer and expand the **Oracle Content Servers** node.
2. Right-click the content server that you want to work offline with.
3. Right-click and choose **Work Offline**. The server icon now shows a red offline indicator (Figure 8–9). In addition, the **Work Offline** option in its context menu is preceded by a check mark.

Figure 8–9 Offline Server Indicator

After going to offline mode, you can only access files and folders on the server that you have checked out (see "Checking Out Content Files" on page 8-18) or specifically made available offline (see "Making Folders and Files Available Offline" on page 8-42). When you have finished working offline and are ready to reconnect to a server, right-click the server and click **Work Offline** from the context menu. If prompted, provide your login credentials by entering your user name and password.

9

Working With E-mail

This section covers these topics:

- "About E-mail Integration" on page 9-1
- "E-mail Specific Metadata on Oracle Content Server" on page 9-1
- "Default E-mail Metadata and File Names" on page 9-2
- "Setting the E-mail Attachment Option" on page 9-3
- "Checking In E-mail" on page 9-3
- "Inserting Links to Content Files on a Server Into E-mail" on page 9-8
- "Attaching Content Files on a Server to E-Mail" on page 9-10
- "Opening Checked-In E-mail Messages" on page 9-10
- "Working With Distribution Lists" on page 9-11

Note: See also Chapter 8, "Working With Content Folders and Files."

9.1 About E-mail Integration

E-mail client integration enables you to check e-mail messages and their attachments in to a content server directly from Microsoft Outlook or Lotus Notes and share them with others in your organization. You can drag and drop e-mails directly into content folders on a server, or you can use a special content check-in form (Oracle Content Server only).

Checked-in e-mail messages are not intended to be checked out, modified, and checked back in. E-mail 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 e-mail message from a server to view it in your default e-mail 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.

9.2 E-mail Specific Metadata on Oracle Content Server

With the Desktop Integration Suite components installed on an Oracle Content Server instance, the content check-in form typically includes six e-mail specific metadata fields, providing they were enabled on the content server (see Table 9–1 below). These are all optional metadata fields, which means you do not need to provide values for them in order to check in an e-mail message. If used, these metadata fields are

pre-populated with available values when you check an e-mail message or attachment in to the content server.

Table 9–1 E-mail Specific Metadata Fields

Field Label on Content Check-in Form	Field Name in Content Server	Description
Author Or Originator	EmailFrom	The sender of the e-mail message (that is, the name in the 'From' field).
Addressee(s)	EmailTo	The recipient or recipients of the e-mail message (that is, the name or names in the 'To' field).
Other Addressee(s)	EmailCC	The other recipients of the e-mail message (that is, that names in the 'Cc' field). Please note that any names in the 'Bcc' field are ignored.
Email Subject	EmailSubject	The subject line of the e-mail message.
Publication Date	PublicationDate	This is the date and time that the e-mail message was sent (as recorded in the message header).
Received Date	ReceiveDate	This is the date and time that the e-mail message was received (as recorded in the message header).

9.3 Default E-mail Metadata and File Names

Oracle Content Server

Oracle Content Server can store multiple files of the same name as separate content items. However, in the integration of Oracle Content Server with e-mail 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 add an e-mail to a content folder that already contains an e-mail of the same name, it is automatically checked in as a new revision to the existing item on the server. For example, if *process.doc* is in a folder on the server and you add 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 add *process2.doc* or *process.xls* 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 e-mail 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 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 e-mail 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 Content Server, there is no revisioning on these servers.)

9.4 Setting the E-mail Attachment Option

When you check e-mail messages with attachments in to the content server, you have the option of checking in an attachment separately from its e-mail 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 e-mail message with an attachment in to the server.

Note: An "attachment" is any file formally attached to an e-mail.

Perform these steps to set how e-mail attachments are handled during check-ins:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook:** Open the **Oracle UCM** menu and then select **Email Integration Settings...**.

   Lotus Notes: Open the **Actions** menu and then select **Email Integration Settings...**.

   The Email Checkin Settings dialog is displayed (see "Email Checkin Settings Dialog" on page A-49).
3. Select the appropriate option to specify how attachments to e-mail messages should be handled when checking e-mail messages with attachments in to the content server:

   - **Separate Attachments:** Each e-mail attachment is checked in to the content server as a separate item from the e-mail message, each with its own content ID. The body text of the checked-in e-mail message will include links to each of the checked-in attachments.
   - **Keep Attachments:** The attachment is embedded in the e-mail message and both are checked in as a single content item with a single content ID. The attachment is embedded in the e-mail message.
   - Ask: You are prompted to specify how each e-mail attachment should be handled every time you check in an e-mail message with one or more attachments.

   Please note that this setting only applies if you check in an e-mail using the Check In Mail Item feature in Microsoft Outlook or Lotus Notes, not if you drag and drop an e-mail into a contribution folder. In that case, e-mail is always checked in with its attachments embedded.
4. Click **OK** to close the Email Checkin Settings dialog. The setting takes effect immediately.

9.5 Checking In E-mail

Once you have integrated your e-mail application with a content server and connected your computer to the server, you are ready to use the content server for storing e-mail messages and attachments and sharing them with others in your organization.

This section covers these topics:

- Checking In E-mail Messages Using the Check In Mail Item Feature
- Checking In E-mail Messages By Dragging and Dropping
- Checking In E-mail Messages With Attachments

9.5.1 Checking In E-mail Messages Using the Check In Mail Item Feature

You can check e-mail messages in to an Oracle Content Server instance directly from your e-mail application (Microsoft Outlook or Lotus Notes). When you check an e-mail in to an Oracle Content Server instance using the Check In Mail Item feature, the original e-mail is preserved in your e-mail application. This is different from the drag-and-drop method (see Checking In E-mail Messages By Dragging and Dropping below), which removes the item from your e-mail application (unless you hold the Ctrl key while dragging and dropping the item).

The file name of a checked-in e-mail message is based on its title in the check-in form (with characters not allowed in Windows file names replaced by spaces). By default, this title is the subject line of the e-mail message. However, your server administrator may have changed the configuration to use the e-mail message ID as the default title. 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 e-mail message with attachments, these attachments are handled in accordance with the metadata prompting setting (see "Enabling Metadata Prompting for Content Folders" on page 8-38). Each attachment may automatically be checked in to the content server as a separate item from the e-mail message or together with (that is, embedded in) the e-mail. 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.

Perform these steps to check one or more e-mail messages in to an Oracle Content Server instance using the Check In Mail Item feature:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. Select the e-mail message or messages you want to check in to an Oracle 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:** Open the **Oracle UCM** menu and then select **Check In Mail Item...**. Alternatively, you can also click the **Check In Mail Item** button on the Oracle UCM toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **Oracle UCM** to enable it.)

   Lotus Notes: Open the **Actions** menu and then select **Check In Mail Item...**.
4. If the e-mail message has any attachments, the Attachment Options dialog may be displayed, depending on the Desktop Integration Suite configuration (see "Attachment Options Dialog" on page A-54).

   The Attachment Options dialog lists all detected attachments to the current e-mail message. Select the check box next to an attachment if you want to embed the attachment into the e-mail 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 D. The body of the checked-in e-mail message will then include links to each of the checked-in attachments.

5. The Check In Content dialog opens (see "Check In Content Dialog (E-mail)" on page A-28). (You may be prompted to enter your login credentials first.)

   Note: You check in one e-mail 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 e-mail message.

6. In the **Server** list, select the Oracle Content Server instance that you want to check the e-mail 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).

   Please note that the list of available servers only includes Oracle Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle 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.

   Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers.

8. Complete the **check-in form**. The following defaults are used for some of the metadata fields:

   - **Title:** For e-mail messages, the title defaults to the subject line of the e-mail message (unless your server administrator changed the configuration to use the e-mail 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 or Originator:** This is the sender of the e-mail message ('From' field), as retrieved from the e-mail header. (Please note that the Author field in the form shows the content server user who is checking in the e-mail message.)
   - **Addressee(s):** This is the recipients of the e-mail messages ('To' field), as retrieved from the e-mail header.
   - **Other Addressee(s):** These are the additional recipients of the e-mail message ('Cc' field), if any, as retrieved from the e-mail header. Please note that any names in the 'Bcc' field are ignored.
   - **Email Subject:** This is the subject line of the e-mail message, as retrieved from the e-mail header.

   Some of these metadata fields may not be visible depending on the content server configuration. Other metadata fields may also have default values if you set up Desktop Integration Suite to "remember" the metadata used for the last check-in of

an e-mail or attachment. See "Setting Metadata To Be Remembered for Form-Based Check-ins" on page 7-12 for more information.

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 e-mail message cannot be checked in if any of these fields is empty.

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 e-mail message or attachment in to the selected Oracle 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 e-mail 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 e-mail message.

9.5.2 Checking In E-mail Messages By Dragging and Dropping

As an alternative to checking in e-mail messages using the Check In Mail Item feature (see Checking In E-mail Messages Using the Check In Mail Item Feature above), you can also select the e-mail 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 e-mail into a content folder on a server, the original e-mail is removed from your e-mail 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 e-mail in your e-mail application.

By default, the file name of a checked-in e-mail message is its subject line (with characters not allowed in Windows file names replaced by spaces). If you drag and drop an e-mail message into a contribution folder that already has an e-mail with the same file name, then a sequence number in parentheses is added to the file name; for example, "Re Our Discussion (2).msg." Please note that your server administrator may have changed the configuration to use the e-mail message ID as the file name. Microsoft Outlook messages are checked in as .msg files, and Lotus Notes messages as .eml files.

When you drag and drop an e-mail message with attachments into a content folder on a server, these attachments are always checked in together with (that is, embedded in) the e-mail, regardless of the metadata prompting setting (see "Enabling Metadata Prompting for Content Folders" on page 8-38).

Note: Outlook VCard (.vcf) files are not checked in to the content server.

When you drag and drop a new e-mail message into a content folder on an Oracle Content Server instance, you may be asked to provide metadata for the message, depending on the settings for that content folder (see "Enabling Metadata Prompting for Content Folders" on page 8-38). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the content folder (see "Content File Metadata" on page 8-6).

Perform these steps to check one or more e-mail messages in to a content server by dragging and dropping:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. Select the e-mail 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 e-mail message or messages to a content folder on a server in the mail folders pane.
4. If you dragged and dropped the e-mail to an Oracle Content Server instance and metadata prompting is enabled for the content folder, the Check In Content dialog is displayed (see "Check In Content Dialog (Drag and Drop)" on page A-31). If metadata prompting is disabled for the folder on Oracle Content Server, or if you dragged and dropped the e-mail to an Oracle Content Database server or other 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 e-mail 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 e-mail 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 e-mail message ID as the file name. Microsoft Outlook messages are checked in as .msg files, and Lotus Notes messages as .eml 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.

   Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers.
7. Complete the **check-in form**. The following defaults are used for some of the metadata fields:

   - **Title:** This defaults to the subject line of the e-mail message (unless your server administrator changed the configuration to use the e-mail message ID as the content item title). You can modify the title if you want.
   - **Author or Originator:** This is the sender of the e-mail message ('From' field), as retrieved from the e-mail header. (Please note that the Author field in the form shows the content server user who is checking in the e-mail message.)
   - **Addressee(s):** This is the recipients of the e-mail messages ('To' field), as retrieved from the e-mail header.
   - **Other Addressee(s):** These are the additional recipients of the e-mail message ('Cc' field), if any, as retrieved from the e-mail header. Please note that any names in the 'Bcc' field are ignored.
   - **Email Subject:** This is the subject line of the e-mail message, as retrieved from the e-mail header.

   Some of these metadata fields may not be visible depending on the content server configuration. Other metadata fields may also have default values if you set up

Desktop Integration Suite to "remember" the metadata used for the last check-in of an e-mail or attachment. See "Setting Metadata To Be Remembered for Form-Based Check-ins" on page 7-12 for more information.

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 e-mail message cannot be checked in if any of these fields is empty.

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 e-mail 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.

9.5.3 Checking In E-mail Messages With Attachments

When you check in an e-mail 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 9–2 below.

Table 9–2 Handling of E-mail Attachments

Check-in Method	Check in to Oracle Content Server	Check in to Oracle Content DB or other WebDAV server
Check In Mail Item feature (see "Checking In E-mail Messages Using the Check In Mail Item Feature" on page 9-4)	Attachment are checked in according to the setting in the Email Checkin Settings dialog (see "Email Checkin Settings Dialog" on page A-49).	n/a
Dragging and dropping (see "Checking In E-mail Messages By Dragging and Dropping" on page 9-6)	Attachments are always checked in along with the e-mail messages (that is, embedded in them).	Attachments are always checked in along with the e-mail messages (that is, embedded in them).

If attachments are checked in to an Oracle Content Server instance as separate content items, the content information page of their associated e-mail 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.

9.6 Inserting Links to Content Files on a Server Into E-mail

You can insert links to content files on a server into an e-mail message. You can provide your own link text and also specify the link target file rendition.

Note: If you use Microsoft Word as your e-mail editor in Outlook, you will not be able to use the Desktop Integration Suite attachment feature. To use this feature, you need to use Outlook's own HTML or text editor.

Perform these steps to insert a link to a content item on a server into an e-mail:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. Create or open an e-mail message.
3. **Microsoft Outlook:** Open the **Tools** menu and then select **Get Attachment...**. Alternatively, you can also click the **Get Attachment** button on the Oracle UCM toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **Oracle UCM** to enable it.)

   Lotus Notes: Open the **Actions** menu and then select **Get Attachment...**.
4. The Get Attachment dialog is displayed (see "Get Attachment Dialog" on page A-55).
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file on the content server that you want to link to in the e-mail. Please note that the list of available servers includes only Oracle Content Server instances, not Oracle Content Database or other WebDAV servers. See "Select Content Dialog" on page A-17 for more information.

   After you have selected a file, the **Content Item** field in the Get Attachment dialog shows the content ID of the selected file.
6. In the Get Attachment dialog, select the **Link** panel.
7. Provide the **link text** for the hyperlink that will be inserted in the e-mail 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 e-mail message as "*Specified_Link_Text*: *URL_To_Content_Item*." If you specify no link text, only the URL is inserted.
8. 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 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. 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 into the e-mail message. You can repeat this process if you want to insert more than one hyperlink into the e-mail.

9.7 Attaching Content Files on a Server to E-Mail

You can attach content files on a server to an e-mail message.

> **Note:** If you use Microsoft Word as your e-mail editor in Outlook, you will not be able to use the Desktop Integration Suite attachment feature. To use this feature, you need to use Outlook's own HTML or text editor.

Perform these steps to attach a content item on a server to an e-mail:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. Create or open an e-mail message.
3. **Microsoft Outlook:** Open the **Tools** menu and then select **Get Attachment...**. Alternatively, you can also click the **Get Attachment** button on the Oracle UCM toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **Oracle UCM** to enable it.)

   Lotus Notes: Open the **Actions** menu and then select **Get Attachment...**.
4. The Get Attachment dialog is displayed (see "Get Attachment Dialog" on page A-55).
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file on the content server that you want to attach to the e-mail. Please note that the list of available servers includes only Oracle Content Server instances, not Oracle Content Database or other WebDAV servers. See "Select Content Dialog" on page A-17 for more information.

   After you have selected a file, the **Content Item** field in the Get Attachment dialog shows the content ID of the selected file.
6. In the Get Attachment dialog, select the **File** panel.
7. Select the **file rendition** of the content item that you want to attach to the e-mail:
   - **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc 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 content item to the e-mail message. You can repeat this process if you want to attach more than one file to the e-mail.

9.8 Opening Checked-In E-mail Messages

You can open a checked-in e-mail message from a server to view it in your default e-mail 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. E-mail messages are checked in to a content server for the express purpose of preserving them exactly as they were received.

Microsoft Outlook or Lotus Notes

Browse the content folders on a server to find the e-mail message you want to view. E-mail messages are checked in as .msg files (Microsoft Outlook) or .eml files (Lotus Notes). To open an e-mail 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 e-mail 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 also browse to e-mail files in content folders on a server (see "Browsing to Content Files" on page 8-33), but you can also search for them (see "Searching for Content Files" on page 8-34). Once you have located the e-mail message you want to view, right-click the file and choose **View** from the context menu.

9.9 Working With Distribution Lists

A distribution list is a collection of e-mail 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 Content Server instance (providing it is running the RmaEmail component). Please note that 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 **Oracle UCM** menu 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 e-mail editor in Outlook, you will not be able to check in distribution lists. To use this feature, you need to use 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 Outlook Address Book
- Editing a Distribution List
- Deleting a Distribution List

9.9.1 Checking In a New Distribution List

You can create a new e-mail distribution list and then check that list in to an Oracle Content Server instance. To do so, perform these steps:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).

2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (You may be prompted to enter your login credentials first.)

4. Click **Add**.

   The Edit Distribution List dialog is displayed (see "Edit Distribution List Dialog" on page A-52).

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 e-mail 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 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.

9.9.2 Checking In a Distribution List From the Outlook Address Book

You can select an e-mail distribution list that already exists in your Microsoft Outlook address book and check that list in to an Oracle Content Server instance. To do so, perform these steps:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).

2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (You may be prompted to enter your login credentials first.)

4. Click **Address Book**.

   The Check In Distribution List From Address Book dialog is displayed (see "Check In Distribution List From Address Book Dialog" on page A-53).

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 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.

If you use Microsoft Word as your e-mail editor in Outlook 2002 (XP), you are not able to check in a distribution list. To use this feature, you need to switch to Outlook's HTML or text editor.

9.9.3 Editing a Distribution List

Once you check a distribution list in to an Oracle 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

Perform these steps to add a new member to an existing distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (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 is displayed (see "Edit Distribution List Dialog" on page A-52).
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 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

Perform these steps to change the name or address of a member of a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (You may be prompted to enter your login credentials first.)
4. Select the distribution list which contains the member whose name or address you want to modify.
5. Click **Edit**.

   The Edit Distribution List dialog is displayed (see "Edit Distribution List Dialog" on page A-52).

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 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

Perform these steps to delete a member from a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (You may be prompted to enter your login credentials first.)
4. Select the distribution list which contains the member that you want to remove from the list.
5. Click **Edit**.

   The Edit Distribution List dialog is displayed (see "Edit Distribution List Dialog" on page A-52).
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 member, 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 Content Server instance.

12. Click **OK** to the check-in confirmation message and then click **Close** to close the Distribution List Checkin dialog.

If you use Microsoft Word as your e-mail 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 Outlook's HTML or text editor.

9.9.4 Deleting a Distribution List

You can delete a distribution list from Oracle 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.

Perform these steps to delete a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook:** Open the **Oracle UCM** menu 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 (see "Distribution List Checkin Dialog" on page A-51). (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.

10

Inserting Managed Content Into Microsoft Office Files

This section covers these topics:

- "About Inserting Managed Content Into Microsoft Office Files" on page 10-1
- "Inserting Links" on page 10-4
- "Inserting Files" on page 10-5
- "Inserting Images" on page 10-5

10.1 About Inserting Managed Content Into Microsoft Office Files

Desktop Integration Suite ties in to the built-in object insertion features of Microsoft Office applications by enabling you to insert items from a content server (Oracle Content Server instances only) 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 Office document.

The following sections provide more information about inserting managed content:

- Understanding Inserted Links
- Understanding Inserted Files
- Understanding Inserted Images

10.1.1 Understanding Inserted Links

You can insert a hyperlink to a file on a content server (Oracle Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop Integration Suite uses Office's built-in hyperlink insertion features; the only difference is that you can point to a file on a content server rather than a local file.

When inserting a link into an 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 a content item:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc 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 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.

10.1.2 Understanding Inserted Files

You can insert the contents of a file on a content server (Oracle Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop Integration Suite uses Office's built-in file insertion features; the only difference is that you can insert the contents of a file on a content server rather than a local file.

The file contents are inserted statically; that is, there is no dynamic link between the file contents in the 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 Office document and how this happens depends on the file format, the current Office application, and the general 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, or IRM) 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 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 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.

10.1.3 Understanding Inserted Images

You can insert an image file on a content server (Oracle Content Server instances only) at the current cursor position in a Microsoft Word, Excel, or PowerPoint document. Desktop Integration Suite uses Office's built-in file insertion features; the only difference is that you can insert an image from a content server rather than a local file.

The inserted image is not linked to its content item on the server. This means that the image in the document is not updated automatically if the source image is updated on the content server, or vice versa.

Whether an image can be inserted into the Office document and how this happens depends on the image file format, the current Office application, and the general 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 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 an 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 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.

10.2 Inserting Links

Perform these steps to insert a hyperlink to an item on a content server into an Office document:

1. Move the cursor to the position in the Office document where you want to insert the hyperlink.
2. **Microsoft Word 2002 (XP) or 2003:** On the **Oracle UCM** menu, choose **Insert...**.

   Microsoft Word 2007: On the **Oracle UCM** ribbon, choose **Insert** on the **Insert** panel.

   The Insert Content Item dialog is displayed (see "Insert Content Item Dialog" on page A-42).
3. Open the **Link** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file on the content server that you want to link to. Please note that the list of available servers includes only Oracle Content Server instances, not Oracle Content Database or other WebDAV servers. See "Select Content Dialog" on page A-17 for more information.

   After you have selected a file, the **Content Item** field in the Insert Content Item dialog shows the content ID of the selected file.
5. Provide the **link text** for the hyperlink that will be inserted in the 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. Select the **file rendition** that the hyperlink should point to:
   - Native Rendition
   - Web-Viewable Rendition
   - HTML Rendition
   - Content Information Page

   See "Understanding Inserted Links" on page 10-1 for further details.
7. 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 into the Office document.

10.3 Inserting Files

Perform these steps to insert the contents of a file on a content server into an Office document:

1. Move the cursor to the position in the Office document where you want to insert the file.
2. **Microsoft Word 2002 (XP) or 2003:** On the **Oracle UCM** menu, choose **Insert...**.

   Microsoft Word 2007: On the **Oracle UCM** ribbon, choose **Insert** on the **Insert** panel.

   The Insert Content Item dialog is displayed (see "Insert Content Item Dialog" on page A-42).
3. Open the **File** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file on the content server whose contents you want to insert. Please note that the list of available servers includes only Oracle Content Server instances, not Oracle Content Database or other WebDAV servers. See "Select Content Dialog" on page A-17 for more information.

   After you have selected a file, the **Content Item** field in the Insert Content Item dialog shows the content ID of the selected file.
5. Select the **file rendition** whose contents you want to insert:
   - Native Rendition
   - Web-Viewable Rendition

   See "Understanding Inserted Links" on page 10-1 for further details.
6. Click **OK** to insert the contents of the selected file into the Office document.

Note: You cannot insert a sealed document (as managed by Oracle Information Rights Management, or IRM) into an unsealed document.

10.4 Inserting Images

Perform these steps to insert an image on a content server into an Office document:

1. Move the cursor to the position in the Office document where you want to insert the image.
2. **Microsoft Word 2002 (XP) or 2003:** On the **Oracle UCM** menu, choose **Insert...**.

   Microsoft Word 2007: On the **Oracle UCM** ribbon, choose **Insert** on the **Insert** panel.

   The Insert Content Item dialog is displayed (see "Insert Content Item Dialog" on page A-42).
3. Open the **Image** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the image on the content server that you want to insert. Please note that the list of available servers includes only Oracle Content Server instances, not Oracle

Content Database or other WebDAV servers. See "Select Content Dialog" on page A-17 for more information.

After you have selected an image file, the **Content Item** field in the Insert Content Item dialog shows the content ID of the selected file.

5. 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).
6. Select the **file rendition** whose contents you want to insert:
   - Native Rendition
   - Web-Viewable Rendition

   See "Understanding Inserted Links" on page 10-1 for further details.
7. Click **OK** to insert the selected image file into the Office document.

11

Comparing Managed Microsoft Word Documents

This section covers these topics:

- "About Comparing Managed Word Documents" on page 11-1
- "Comparing a Word Document With a Different Revision" on page 11-2
- "Comparing a Word Document With Another Document" on page 11-3

11.1 About Comparing Managed Word Documents

Desktop Integration Suite 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 an earlier 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. Please note that 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 (Figure 11–1).

Figure 11–1 Marked Differences in Word Document

~~High Hopes~~Great Expectations¶

¶

My ~~last~~father's family name being Pirrip, and my ~~given~~Christian name Philip, my infant tongue could make of ~~these~~both names nothing longer or more explicit than Pip. So, I called myself Pip, and came to be ~~known as~~called Pip.¶

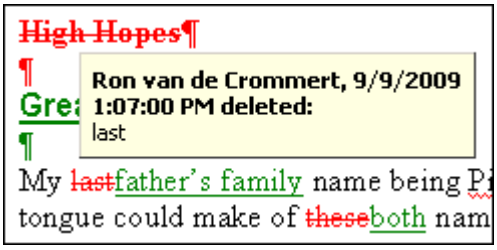
¶

I give Pirrip as my father's family name, ~~since that was~~ on the authority of his tombstone ~~and~~ and my sister—Mrs Joe Gargery, who married the blacksmith. As I never saw my father or my mother, and never saw any likeness of either of them (~~after all, they lived well~~for their days were long before the days of photographs~~). My~~), my first fancies regarding what they were like, were ~~therefore~~ unreasonably derived from their tombstones. The shape of the letters on my father's ~~tombstone~~, gave me ~~the peculiar notion~~an odd idea that he was a ~~stout,~~square, stout, dark man, with curly ~~grey~~black hair. From the character and turn of the inscription, "~~,~~Also Georgiana Wife of the Above,"~~.~~ I ~~childishly concluded~~drew a childish conclusion that my mother was freckled and sickly.¶

¶

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 11–2. 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 11–2 Screen Tip Showing Information About File Change



11.2 Comparing a Word Document With a Different Revision

If the current Word document is managed by a content server and it is not a read-only copy (see "Content Management Actions on Files" on page 8-8), 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 "Opening Files in Microsoft Office Applications" on page 8-18).
2. **Microsoft Word 2002 (XP) or 2003:** On the **Oracle UCM** menu, choose **Compare With** and then **Earlier Revision...**.

   Microsoft Word 2007: On the **Oracle UCM** ribbon, choose **With Earlier Revision** on the **Compare** panel.

   > **Note:** If the option to choose an earlier revision is not available, then the current document is either not managed by a content server or it is currently in read-only mode (that is, being "viewed" rather than "opened").

   The Choose Content Item Revision dialog is displayed, which shows the content information page of the current Word document (see "Choose Content Item Revision Dialog" on page A-48).
3. At the bottom of the content information page is the revision history, which lists all existing revisions of the content item, along with their release date, expiration date, status, and available actions. The current revision is marked in the Revision column using straight brackets (for example, "[6]"), with the revision number not being hyperlinked.
4. Go to the revision that you want to compare the current document with by clicking its hyperlinked revision number in the **Revision** column.

   The content information page of that document revision is displayed, with that revision marked as the current revision.
5. Click **Select**.

   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

configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification.

11.3 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 "Opening Files in Microsoft Office Applications" on page 8-18).
2. **Microsoft Word 2002 (XP) or 2003:** On the **Oracle UCM** menu, choose **Compare With** and then **Content Item...**.

   Microsoft Word 2007: On the **Oracle UCM** ribbon, choose **With Content Item** on the **Compare** panel.

   Note: If you want to compare the current 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 is displayed, where you can search for, or browse to, a Word document on a content server (see "Select Content Dialog" on page A-17).
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.

A

User Interface

This section describes the user interface screens and dialogs associated with the Desktop Integration Suite 11*g*R1 client software.

Server Dialogs

- "Add Server Dialog" on page A-2
- "Server Options Dialog" on page A-5
- "Server Properties Dialog" on page A-8
- "Edit Server List Dialog" on page A-9
- "Edit Server Dialog" on page A-10

Content Management Dialogs

- "Column Settings Dialog" on page A-11
- "Folder Properties Dialog" on page A-13
- "Hierarchical Folder Information Page" on page A-14
- "Select Content Dialog" on page A-17
- "Save Dialog (Save As New)" on page A-23
- "Check In Content Dialog (Check In With Metadata)" on page A-27
- "Check In Content Dialog (E-mail)" on page A-28
- "Check In Content Dialog (Drag and Drop)" on page A-31
- "Check In Document Dialog" on page A-34
- "Save Changes and Check In Document Dialog" on page A-36
- "Content Item Properties Dialog" on page A-39
- "Content Query Capture Dialog" on page A-41
- "Insert Content Item Dialog" on page A-42
- "Choose Content Item Revision Dialog" on page A-48

E-mail Dialogs

- "Email Checkin Settings Dialog" on page A-49
- "Distribution List Checkin Dialog" on page A-51
- "Edit Distribution List Dialog" on page A-52
- "Check In Distribution List From Address Book Dialog" on page A-53

- "Attachment Options Dialog" on page A-54
- "Get Attachment Dialog" on page A-55

Offline Content Manager Dialogs

- "Offline Content Manager Dialog" on page A-59
- "View Options Dialog" on page A-60
- "Offline Folder Properties Dialog" on page A-61
- "Offline Content Item Properties Dialog" on page A-62

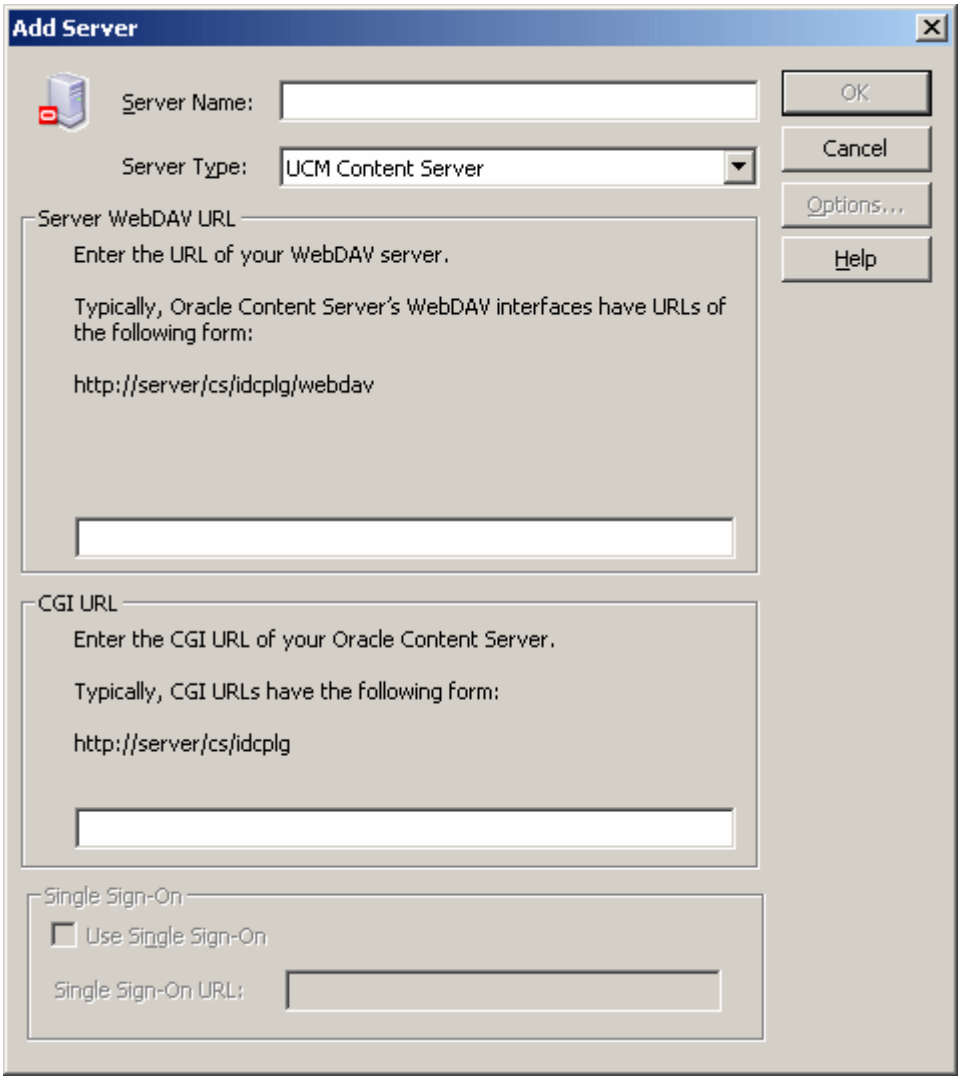
Note: Depending on your Windows operating system (XP or Vista) and your configuration, the screenshots in this section may look slightly different from what you are seeing on your computer.

A.1 Add Server Dialog

The Add Server dialog is used to create a new connection to a content server, which enables you to access that server's content and functionality directly from supported applications on your computer.

Note: Your organization may require that the server connections be set up for you. If you are not sure, contact your system administrator.

Figure A–1 Add Server Dialog



Element	Description
Server Name	Specifies the name of the content server connection. This is the name that will be displayed in the list of available servers.

Element	Description
Server Type	Specifies the type of the content server: ■ **UCM Content Server:** This is an instance of Oracle Content Server, which is part of Oracle Universal Content Management (UCM). These servers offer the broadest content management integration: opening files directly from the server (check-out), saving files to the server (check-in), searching for files on the server, and so on. ■ **Content DB Server:** This is an Oracle Content Database (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 Desktop Integration Suite. ■ **WebDAV Server:** This is a non-UCM, non-Content DB server that supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. 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 Desktop Integration Suite. Contact your content server administrator for assistance if you are not sure which server type to choose.

Server WebDAV URL	Specifies the WebDAV URL of the content server. This information is needed to access the resources provided by the server. The URL for Oracle Content Server instances 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`
	Please note that 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.
	Contact your system administrator if you do not know exactly what URL to use.

CGI URL	Specifies the CGI URL of the content server. This field is available only for servers of type "UCM Content Server." By default, the CGI URL is the same as the WebDAV URL (see above), without '/webdav'. If you log in to an Oracle Content Server instance using your web browser, you can see the CGI URL in the browser address bar. The CGI URL is the address from the beginning up to, but not including, the question mark (?). Contact your system administrator if you do not know exactly what URL to use. Please note that there is no CGI URL section if Windows Explorer is the only integration on your computer.

Element	Description
Use Single Sign-On	Select this check box if the content server connection uses single sign-on (SSO). The Single Sign-On section is available only for servers of type "Content DB Server" and "WebDAV Server." Contact your system administrator if you do not know exactly whether to enable this option.
Single Sign-On URL	Specifies 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 do not know exactly what URL to use.
OK	Click this button to close this dialog and create the new content server connection using the specified settings.
Cancel	Click this button to close this dialog and cancel the creation of the content server connection.
Options	Click this button to open the Server Options dialog (see "Server Options Dialog" below), where you can set a number of options for the content server connection. This button is available only if you have specified a server name and the server type is 'UCM Content Server'.
Help	Click this button to display context-sensitive help information for this dialog.

A.2 Server Options Dialog

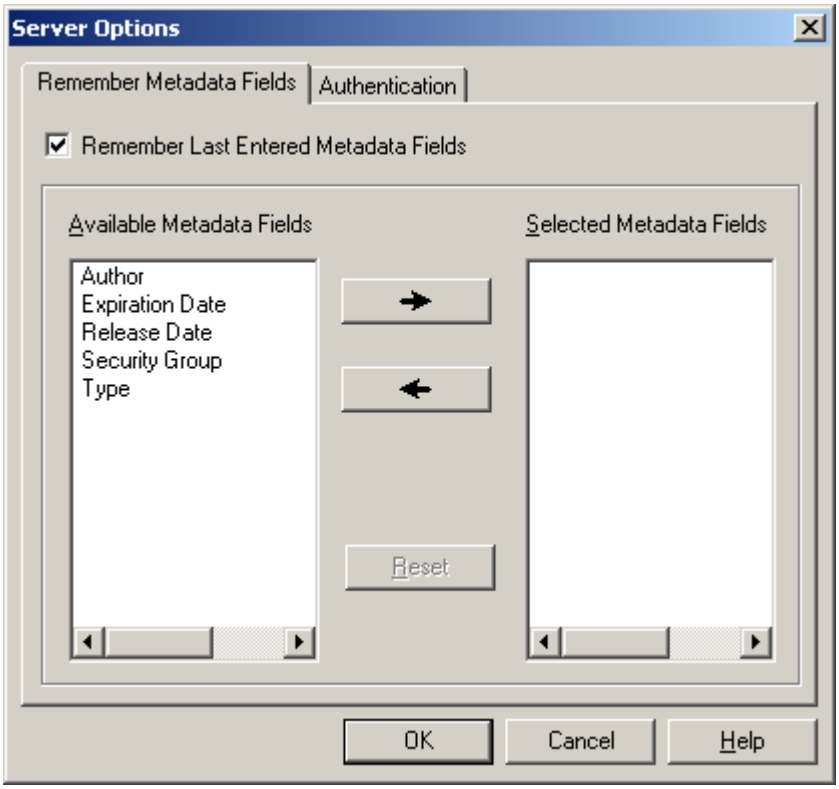
The Server Options dialog is used to configure a number of settings for an Oracle Content Server connection. It has two tabs:

- "Server Options: Remember Metadata Fields" on page A-5
- "Server Options: Authentication" on page A-7

A.2.1 Server Options: Remember Metadata Fields

The Remember Metadata Fields tab on the Server Options dialog is used to define whether metadata field values should be remembered each time you check a content item in to an Oracle Content Server instance using a check-in form, and if so, which metadata fields. Whatever values are set for these metadata fields for a particular check-in will automatically be used the next time you check in another content item.

Figure A–2 Remember Metadata Fields of Server Options Dialog



Element	Description
Remember Last Entered Metadata Fields	Select this check box if you want metadata field values to be remembered whenever you check a new content item in to an Oracle Content Server instance using a check-in form. Once you select the check box, the Available Metadata Fields box is populated with a list of all available metadata fields on the content server whose values can be remembered.
Available Metadata Fields	This box lists all available metadata fields on the content server whose values can be remembered for check-in.
Selected Metadata Fields	This box lists all metadata fields on the content server whose values will be remembered with every content item check-in.
	Click this button to move a metadata field from the list of available fields to the list of selected fields; in other words, to specify that the values of the metadata field should be remembered with every new content item check-in.
	Click this button to move a metadata field from the list of selected fields to the list of available fields; in other words, to specify that the values of the metadata field should no longer be remembered with every new content item check-in.
Reset	Click this button to cancel any changes you made and return the dialog to the state when you opened it.
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.

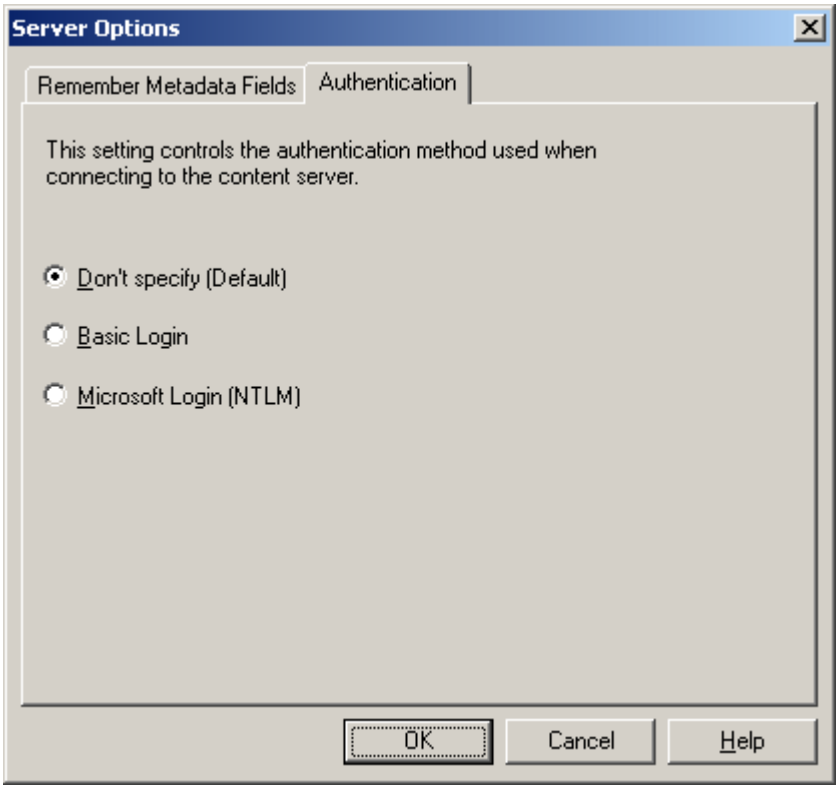
Element	Description
Help	Click this button to display context-sensitive help information for this dialog.

A.2.2 Server Options: Authentication

The Authentication tab on the Server Options dialog is used to specify what authentication method is used when client computers connect to an Oracle Content Server instance.

> **Note:** Contact your system administrator if you need any help with selecting the authentication method for a content server.

Figure A–3 Authentication Tab of Server Options Dialog



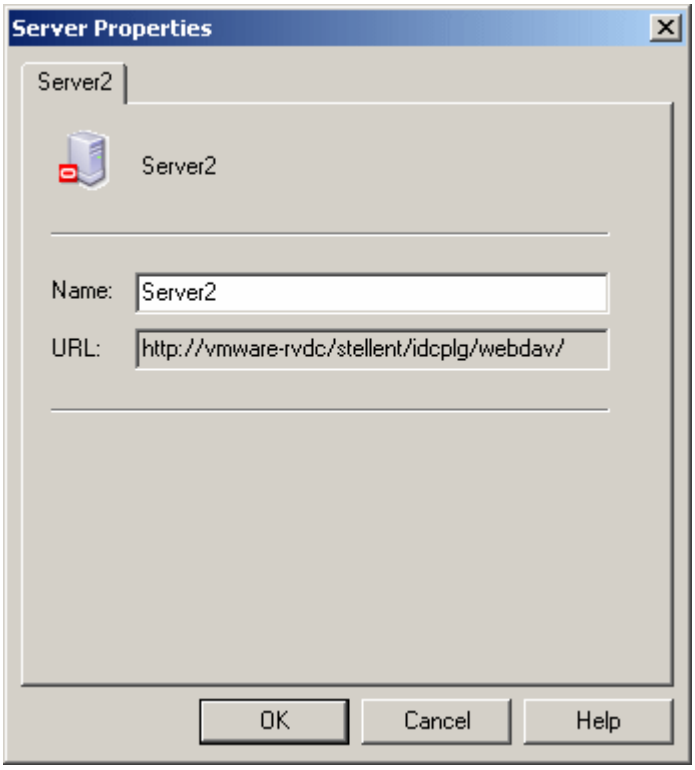
Element	Description
Don't specify (Default)	Select this option if you want to use whatever authentication method is currently set up for the content server. It is recommended that you use this setting unless you are told to use a different one.
Basic Login	Select this option if you want to force Content Server's standard authentication.
Microsoft Login (NTLM)	Select this option if you want to force NTLM authentication.
OK	Click this button to close this dialog and submit any changes you made.

Element	Description
Cancel	Click this button to close this dialog and cancel any changes you made.
Help	Click this button to display context-sensitive help information for this dialog.

A.3 Server Properties Dialog

The Server Properties dialog displays the defined name and URL of the selected content server.

Figure A–4 Server Properties Dialog



Element	Description
Name	This is the name of the content server connection as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). Please note that you cannot edit the name of a server that has any offline files or checked-out content items (in other words, there are files in the offline cache for that server).
URL	This is the WebDAV URL for the content server as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). This URL is used to access the resources provided by your content server. You cannot edit this information. If you need to modify a server URL, you should remove the server connection and re-create it using the URL you want.
OK	Click this button to close this dialog and submit any changes you made.

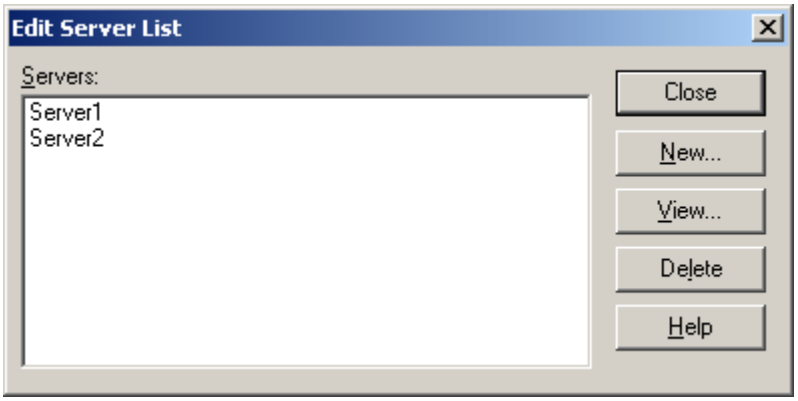
Element	Description
Cancel	Click this button to close this dialog and cancel any changes you made.
Help	Click this button to display context-sensitive help information for this dialog.

A.4 Edit Server List Dialog

The Edit Server List dialog shows all defined content server connections on your computer. You can add a new server connection, view or edit the properties of an existing one, or delete a server connection.

Please note that the list shows the defined server connections on your own computer only, not on other people's computers. Also, any defined server connections will continue to exist on your computer after you remove, reinstall, or update the Desktop Integration Suite client software; in other words, they will still be included in the server list the next time you open the Edit Server List dialog.

Figure A–5 Edit Server List Dialog

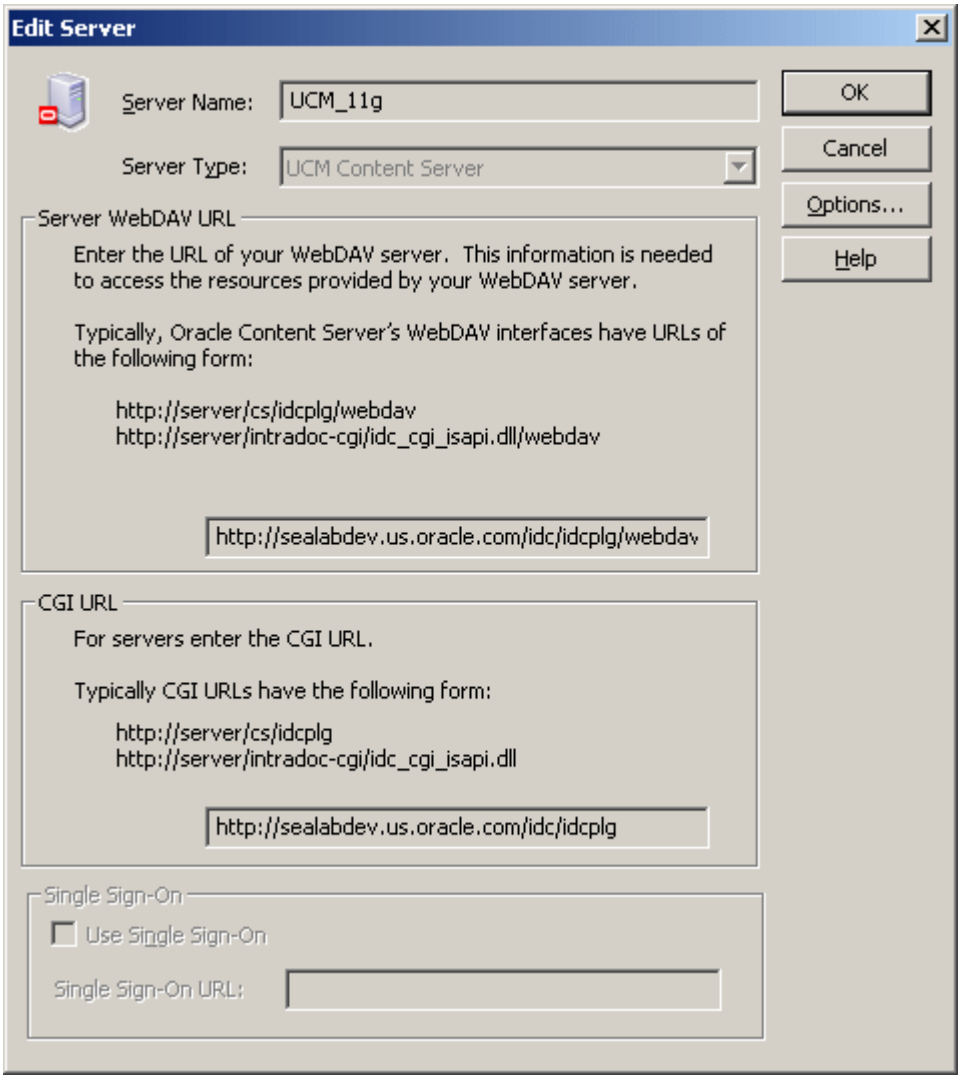


Element	Description
Servers	This area lists all defined content server connections for your own computer.
Close	Click this button to close this dialog.
New...	Click this button to open the Add Server dialog (see "Add Server Dialog" on page A-2), where you can define a new content server connection.
View...	Click this button to open the Edit Server dialog (see "Edit Server Dialog" on page A-10), where you can view the properties of the selected content server connection and set a number of options for it. This button is available only if you select a content server in the list.
Delete	Click this button to delete a content server connection. This button is available only if you select a content server in the list.
Help	Click this button to display context-sensitive help information for this dialog.

A.5 Edit Server Dialog

The Edit Server dialog enables you to view the properties of an existing content server connection and set a number of options for it. This dialog is essentially the same as the dialog to create a new server connection ("Add Server Dialog" on page A-2). You cannot edit any of the server properties, but you can click the **Options...** button to open the Server Options dialog (see "Server Options Dialog" on page A-5), where you can set some options for the server connection (only for servers of type 'UCM Content Server').

Figure A–6 Edit Server Dialog



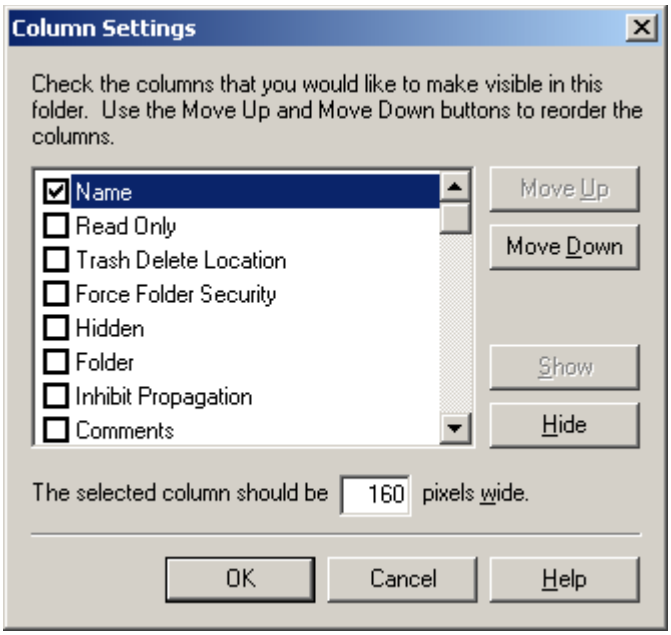
Element	Description
Server Name	This is the name of the content server connection as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). You cannot edit this information. If you want to change the name of a server, you should remove the server connection and re-create it using the name you want.

Element	Description
Server type	This is the type of the content server as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). Three types are supported: UCM Content Server, Content DB Server, and WebDAV Server. You cannot edit this information. If you want to change the type of a server, you should remove the server connection and re-create it using the type you want.
Server WebDAV URL	This is the WebDAV URL for the content server as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). This URL is used to access the resources provided by your content server. You cannot edit this information. If you need to modify the WebDAV URL, you should remove the server connection and re-create it using the correct URL.
CGI URL	This is the CGI URL for the Oracle Content Server instance as specified on the Add Server dialog (see "Add Server Dialog" on page A-2). You cannot edit this information. If you need to modify the CGI URL, you should remove the server connection and re-create it using the correct URL. This section is relevant only for servers of type 'UCM Content Server'. Please note that there is no CGI URL section if Windows Explorer is the only integration on your computer.
Use Single Sign-On	This check box indicates whether the content server connection uses single sign-on (SSO). You cannot edit this information. If you need to modify the SSO setting, you should remove the server connection and re-create it using the correct setting.
Single Sign-On URL	This is the URL of the single sign-on (SSO) server that is used to control access to the content server. You cannot edit this information. If you need to modify the SSO URL, you should remove the server connection and re-create it using the correct URL.
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.
Options	Click this button to open the Server Options dialog (see "Server Options Dialog" on page A-5), where you can set a number of options for an Oracle Content Server connection.
Help	Click this button to display context-sensitive help information for this dialog.

A.6 Column Settings Dialog

The Column Settings dialog enables you to specify what columns should be displayed for the integration folders and their files in the content pane of Windows Explorer and e-mail clients (Microsoft Outlook and Lotus Notes), and what the width of each column should be.

Figure A–7 Column Settings Dialog

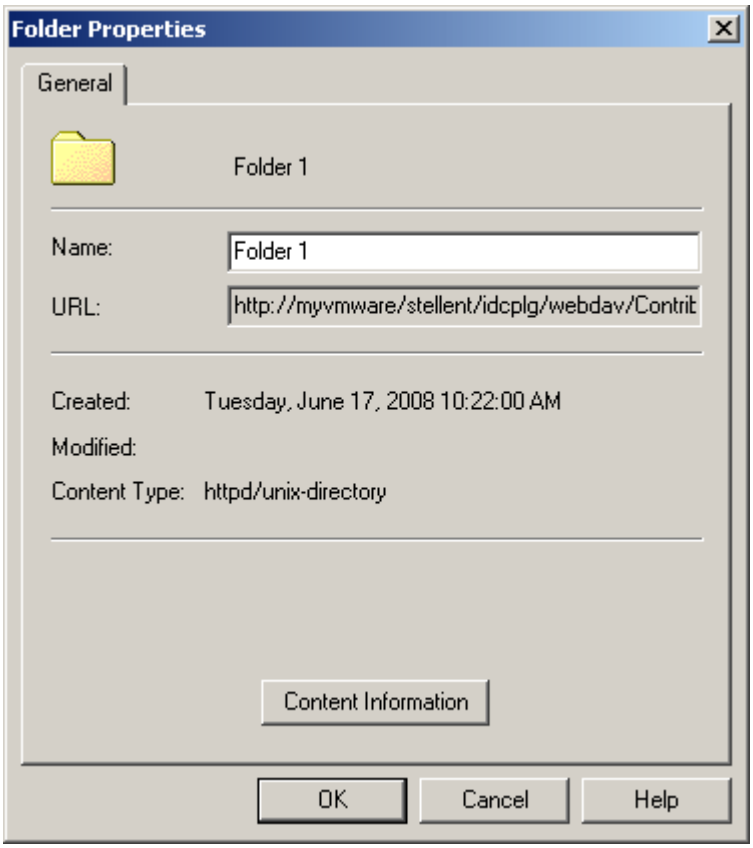


Element	Description
Column names	Select the check box of each column that you want to display for the integration folders and their files in the content pane of Windows Explorer and e-mail clients (Microsoft Outlook and Lotus Notes). The columns are displayed left to right in the order they are listed in this dialog.
Move Up	Click this button to move the selected column up one spot in the list. The columns are displayed left to right as they appear in the list, so the higher a selected column is in the list, the more to the left it is displayed on screen. This button is unavailable if you are at the top of the column list.
Move Down	Click this button to move the selected column down one spot in the list. The columns are displayed left to right as they appear in the list, so the lower a selected column is in the list, the more to the right it is displayed on screen. This button is unavailable if you are at the bottom of the column list.
Show	Click this button to display the selected column. (This has the same effect as selecting the check box next to the column.)
Hide	Click this button to hide the selected column. (This has the same effect as clearing the check box next to the column.)
The selected column should be *x* pixels wide.	Enter the display width (in pixels) of the selected column. You can also drag the column edges in the application to change the column width (as is customary in Windows applications).
OK	Click this button to submit any changes you made and close this dialog.
Cancel	Click this button to cancel any changes you made and close this dialog.
Help	Click this button to display context-sensitive help information for this dialog.

A.7 Folder Properties Dialog

The Folder Properties dialog enables you to view and modify some properties of an existing contribution folder. It resembles the standard folder properties dialog in Windows, but may include some additional elements related to content management.

Figure A–8 Folder Properties Dialog



Element	Description
Name	This is the name of the folder as specified when the folder was originally created. You can change the folder name, providing no other folder of the same name already exists. If you change the name of the folder here, it is also automatically changed in folder hierarchy on the content server. Please note that you can also change the name of a folder by right-clicking it in the integration hierarchy and choosing **Rename**, or by selecting it and pressing F2 on your keyboard.
URL	This is the WebDAV URL of the folder.
Created	This is the date and time that the contribution folder was originally created.
Modified	This is the date and time that the contribution folder was last modified (that is, when an action was last performed that affected the folder).
Content Type	This is the HTTP content type of the contribution folder ("httpd/unix-directory").

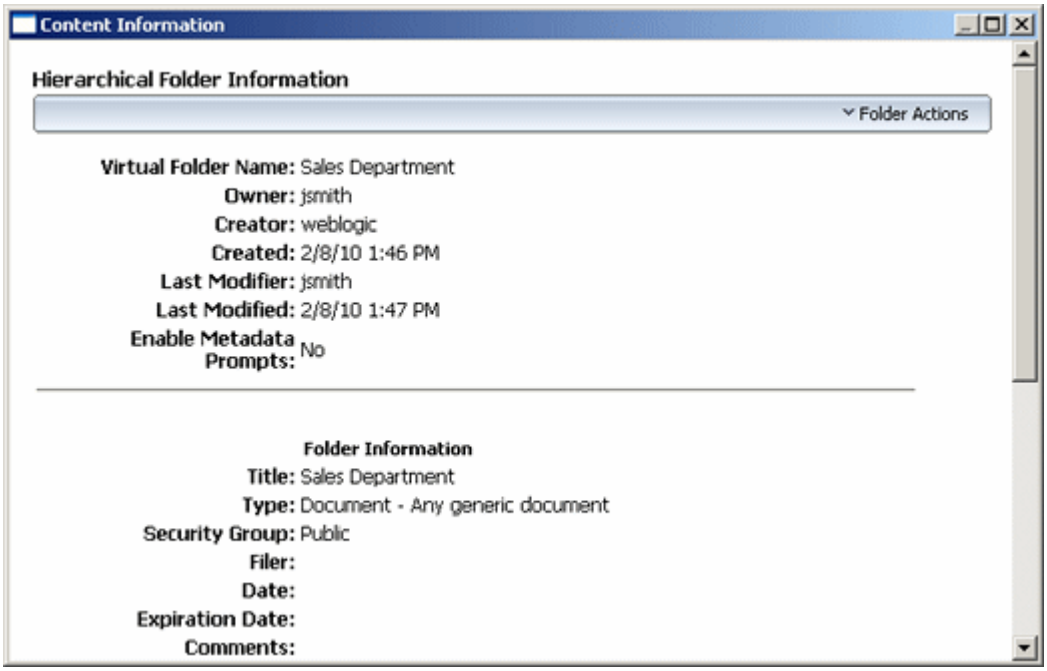
Element	Description
Content Information	This button is displayed for servers of type 'UCM Content Server' only (that is, Oracle Content Server instances). Click this button to open the Hierarchical Folder Information page, which shows a number of content management properties of the contribution folder. See Hierarchical Folder Information Page below for further information.
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.8 Hierarchical Folder Information Page

The Hierarchical Folder Information page shows the properties of the current contribution folder. You cannot edit any information on this page. If you want to modify some folder properties, choose **Update** from the Folder Actions menu in the top-right corner of the page.

> **Note:** The information provided on this page depends on the content server configuration. Also, in addition to some items specific to Desktop Integration Suite, this page also contains a number of standard Content Server metadata fields and action menu items. See the Oracle Content Server documentation for more information about these standard items.

Figure A–9 Hierarchical Folder Information Page



Element	Description
Virtual Folder Name	This is the name of the contribution folder.

Element	Description
Owner	This is the user name of the person who "owns" the contribution folder; that is, who can change the folder metadata and delete the folder. The owner of a folder is often also the person who created it, but this is not necessarily the case.
Creator	This is the user name of the person who created the folder, which will often be the same person as the owner (but does not need to be).
Enable Metadata Prompts	If this property is set to 'Yes', you are prompted to provide metadata if you drag and drop **a new file** to a contribution folder in Windows Explorer. A file is considered new if the folder does not yet contain a file of the same name and is new to this content server. After you provide the metadata, the file is checked in to the content server as a new content item using the metadata provided. If you drag and drop **an existing file** into a contribution folder (that is, the folder already contains a file of the same name), you will not be prompted for metadata and the file is automatically checked in to the content server as a new revision of the existing file (inheriting the metadata of the existing file). If this property is set to 'No', a new file is always checked in to the content server automatically using the default metadata for the contribution folder (as defined by the content server administrator). Please note that if a required field does not have a default value assigned to it, you will still be prompted to provide metadata regardless of this setting. Please note that this field may not be available, depending on the content server configuration (more specifically, the Folders component version).
Title	This is the title of the contribution folder.
Type	This is the default content type of content contributed to the folder. Content types are used to group content items together into categories. See the Oracle Content Server documentation for more information on content types.
Security Group	This is the default security group of content contributed to the folder. Security groups are used to restrict access to content items on the content server. If content is assigned to a security group, only users that have been granted access to this security group can see the content. See the Oracle Content Server documentation for more information on security groups. If a content item is copied from one contribution folder to another, the new copy retains its original security group, unless the folder's Force Folder Security property (see below) is set to 'True'. In that case, the security group of the copied content item is changed to match that of the destination folder.
Expiration Date	This is the default expiration date of content contributed to the folder. If the date is set in the past, you can see the folder, but you are not able to contribute any content to it.

Element	Description
Hidden	If this property is set to '**True**', the folder is hidden. You see a dimmed folder icon if you have permission to the folder's security group ***and*** have selected the "Show hidden when browsing" check box on the Folder Configuration page in your user profile on the content server. Otherwise, the folder is not visible in the contribution folder hierarchy. If this property is set to '**False**', the folder is visible to all users who have permission to the folder's security group. If Windows Explorer is configured to show hidden files and folders, you will see the folders in Windows Explorer. Their hidden status is indicated by a semi-transparent folder icon: Please note that this property is available only when the system administrator has enabled the hide/unhide feature on the content server.
Read Only	If this property if set to '**True**', the folder or any content items in the folder cannot be renamed, moved, or deleted. Content item can still be checked in and folder metadata can be updated. If this property is set to '**False**', all folder operations are available. Please note that this property is available only when the system administrator has enabled the read-only feature on the content server.
Inhibit Propagation	If this property is set to '**True**', no folder metadata is changed during metadata propagation from a higher-level folder. If this property is set to '**False**', the folder is included in metadata propagation from a higher-level folder.
Force Folder Security	If this property is set to '**True**', the security group and account of a content item that is copied into the contribution folder are always changed to match the security group and account of the target folder. If this property is set to '**False**', a content item that is copied into the contribution folder retains its security group and account even they are different from the security group or account of the target folder.
Folder Actions menu	This menu has the following options: ■ **Update:** If you choose this option, a window is displayed, where you can modify the properties of the current folder. Do not forget to click **Submit Update** when you are done. ■ **Create Shortcut:** If you choose this option, a window is displayed, where you can select the target folder for a shortcut link to the current folder. ■ **Propagate:** If you choose this option, the folder's default metadata values are copied to all uninhibited subfolders and their content items. Please note that this menu may contain additional options, depending on the content server configuration.

A.9 Select Content Dialog

The Select Content dialog is used to select a file to be opened or viewed in its native application, inserted in a Microsoft Office application, or attached to an e-mail message. This dialog may comprise multiple pages, each representing a way to select a file:

- **Search:** This page enables you to search for files on an Oracle Content Server instance that meet your search criteria. You can then select a file in the search results list for further use. See "Select Content: Search" on page A-17 for more information.
- **Browse:** This page enables you to navigate to a file on a content server and select it for further use. See "Select Content: Browse" on page A-20 for more information.
- **Offline Files:** This page lists all files that are currently in your local file cache for Desktop Integration Suite. You can select any of these files for further use. See "Select Content: Offline Files" on page A-22 for more information.

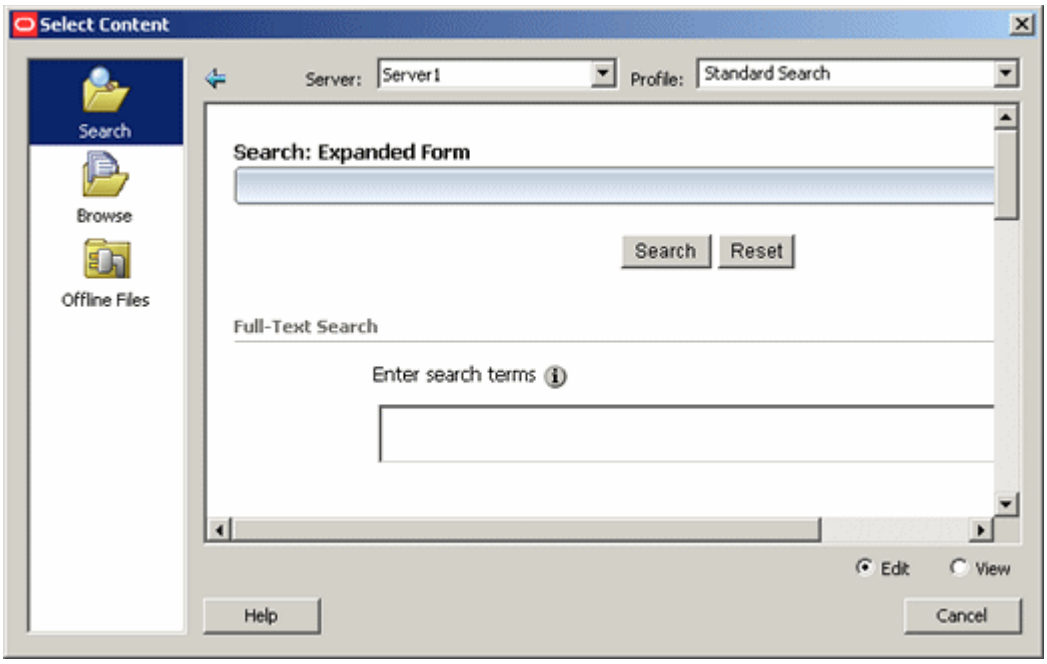
A.9.1 Select Content: Search

The Search panel in the Select Content dialog enables you to search for a file on an Oracle Content Server instance and select it for further use: to be opened or viewed in a Microsoft Office application, inserted into an Office document, attached to an e-mail message, or compared to the current Word document (depending on where you opened this dialog).

> **Note:** You may not be able to do all these actions for files on every content server, depending on the server type. For example, you cannot compare file revisions on an Oracle Content Database server.

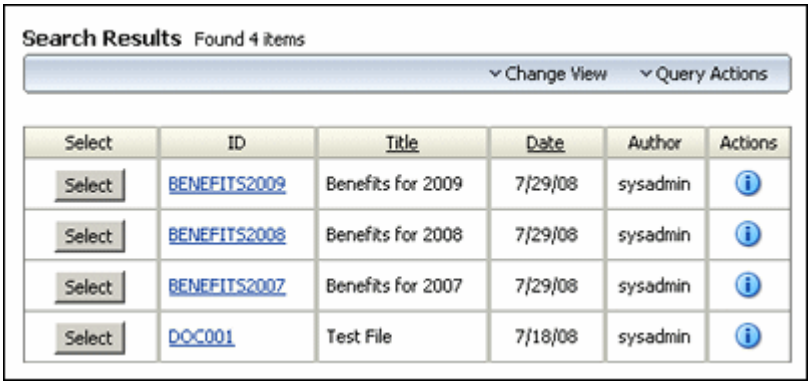
You search for files using a standard content server search form where you specify the search criteria that files should meet. You can then select a file in the search results list for further use. You can perform searches based on metadata (that is, information about files) or full text (that is, text contained in the actual files), or a combination of both. For more details on searching for files on the content server, see the Oracle Content Server documentation.

Figure A–10 Search Panel of Select Content Dialog



To find content, specify the search criteria that the content items should meet and click **Search** in the search form. The dialog then displays a list of all content items on the server that meet the specified criteria.

Figure A–11 Search Results List



In the search results list, click **Select** next to an item to select that item for further processing. You can also view an item's content information page by clicking its info icon. If you click the link in the ID column, you can open or save the file (depending on your computer configuration).

Element	Description
	This is the icon of the current dialog.
	Click the Browse icon to open the Browse page (see "Select Content: Browse" on page A-20).

Element	Description
	Click the Offline Files icon to open the Offline Files page (see "Select Content: Offline Files" on page A-22). Please note that this option may not be available, depending on the context in which you are selecting a file.
	Click this icon to go back one page in a multipage list of search results. If you click this icon on the first search results page, you return to the search form. Please note that you can also right-click in an unused area of the search form and choose **Back** or **Forward** on the menu to move between the search results pages and the search form.
Server	Select the content server that you want to search. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration). Please note that the list of available servers only includes Oracle Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers (as opposed to the server list on the Browse page). This is because the search page uses standard Oracle Content Server search functionality.
Profile	Select the content profile that should be applied to the search form (providing any profiles are defined on the content server). Content profiles are used to limit the metadata fields shown on the search 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. Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers. Contact your content server administrator if you need any assistance.
Search form	This is the standard search form on an Oracle Content Server instance. Specify the search criteria and click **Search** when you are done to start the search query. A search results list is then displayed which shows all content items on the server that meet the specified search criteria.
Edit / View	These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the Oracle UCM menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application. If you select a file for **editing**, it is opened in the current Office application and checked out of the content server. You can make changes as required. When you are done and you close the document or application, you are given the opportunity to check the file back in to the content server as a new revision of the original file. If you select a file for **viewing**, it is opened in the current Office application as a copy of the original file, which is not checked out of the content server. You can make changes as required, but when you are done and you close the document or application, you need to save it as a new file, either locally (using the application's built-in save-as feature) or on the content server (using the Save As New... option on the Oracle UCM menu or ribbon).

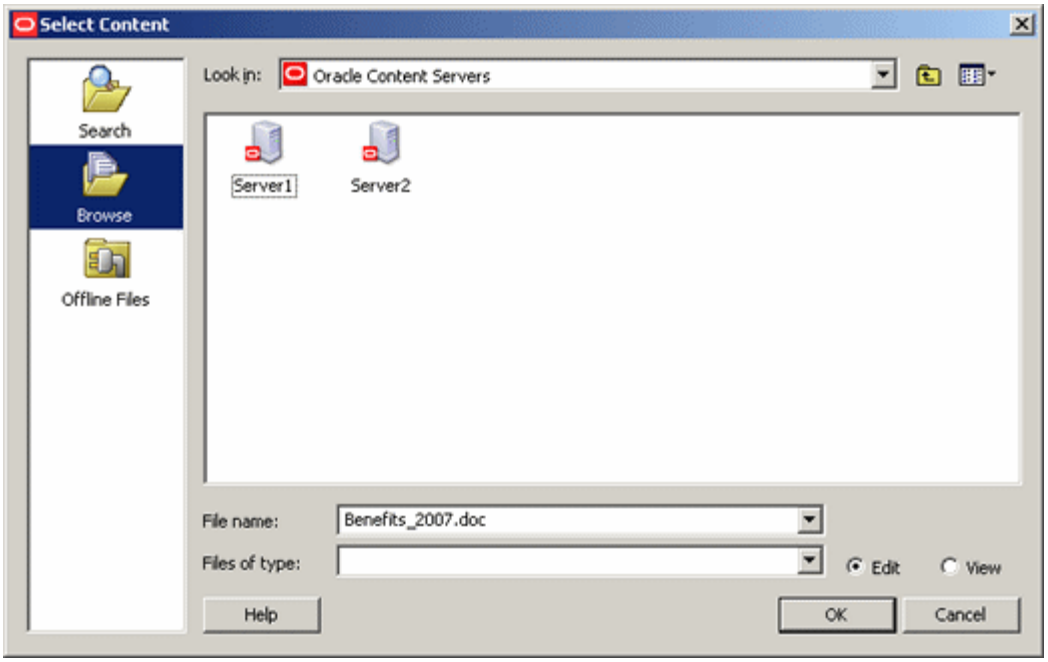
Element	Description
Help	Click this button to display context-sensitive help information for this dialog.
Cancel	Click this button to close the dialog without selecting a file.

A.9.2 Select Content: Browse

The Browse panel in the Select Content dialog enables you to navigate to a file on a content server and select it for further use: to be opened or viewed in a Microsoft Office application, inserted into an Office document, attached to an e-mail message, or compared to the current Word document (depending on where you opened this dialog).

Note: You may not be able to do all these actions for files on every content server, depending on the server type. For example, you cannot compare file revisions on an Oracle Content Database server.

Figure A–12 Browse Panel of Select Content Dialog



Element	Description
	Click the Search icon to open the Search page (see "Select Content: Search" on page A-17).
	This is the icon of the current dialog.
	Click the Offline Files icon to open the Offline Files page (see "Select Content: Offline Files" on page A-22). Please note that this option may not be available, depending on the context in which you are selecting a file.

Element	Description
Look in	Click the server or folder that contains the file you want to select for further use. If you click on a server, you may be prompted to provide your login name and password (depending on the server configuration).
	Click this icon to move up one level in the integration hierarchy.
	Click this icon to select the view mode of the content area: ■ **Icons:** This view mode displays your files and folders as large application icons with their names shown below the icons. ■ **List:** This view mode displays your files and folders as a list of file or folder names preceded by small application icons. ■ **Details:** This view mode displays your files and folders as in list mode, but with additional information such as file type, size, author, security group, timestamp, and the like (if available and relevant).
Content area	This area shows the contents of the selected server or folder in the integration hierarchy. You can work with the items in much the same way as in standard Open dialogs in Windows applications (including right-click menus and the like). If you want, you can show or hide the preview pane in the content area: right-click, then choose **View**, and then **Preview Pane**.
File name	This box shows the name of a selected file. You can also manually enter a file name.
Files of type	If you want the content area to display only files of specific file types (that is, with particular file extensions; for example, only Microsoft Office files), then you can use this menu to select the file type mask.
Edit / View	These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the Oracle UCM menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application. If you select a file for **editing**, it is opened in the current Office application and checked out of the content server. You can make changes as required. When you are done and you close the document or application, you are given the opportunity to check the file back in to the content server as a new revision of the original file. If you select a file for **viewing**, it is opened in the current Office application as a copy of the original file, which is not checked out of the content server. You can make changes as required, but when you are done and you close the document or application, you need to save it as a new file, either locally (using the application's built-in save-as feature) or on the content server (using the Save As New... option on the Oracle UCM menu or ribbon).
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and use the selected file.
Cancel	Click this button to close the dialog without selecting a file.

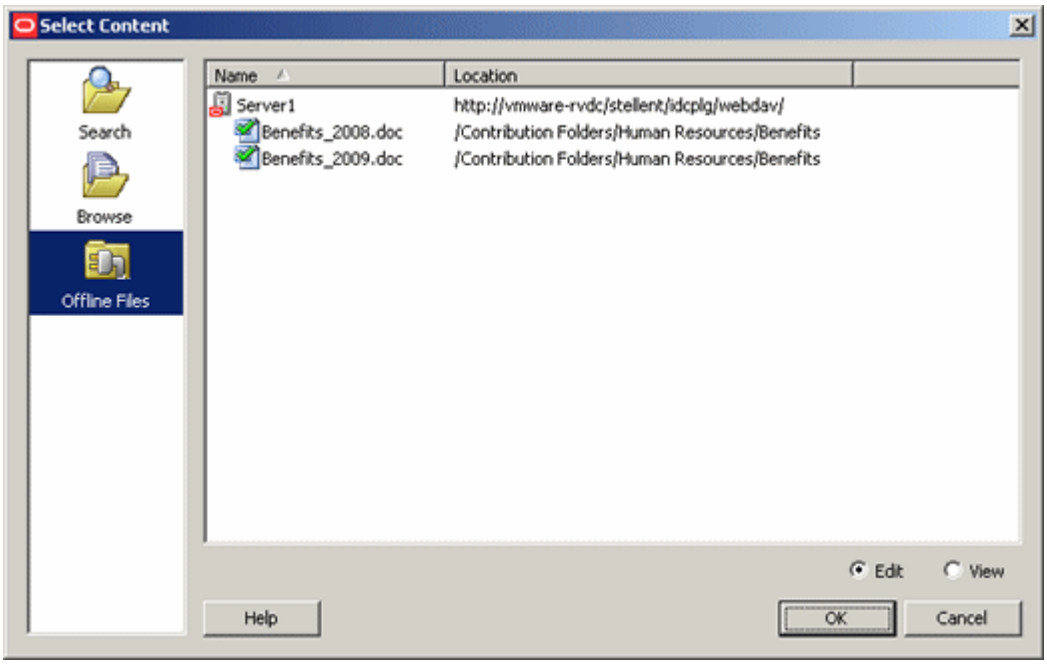
A.9.3 Select Content: Offline Files

The Offline Files panel in the Select Content dialog enables you to select a file in the Desktop Integration Suite file cache on your local computer to be opened or viewed in its native application (for example Microsoft Word). Files are stored in your local cache in the following situations:

- 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), and
- newly created files in Microsoft Office applications that were not checked in successfully (for example, because no server connection could be established).

> **Note:** The icon of each file in the list may show the content management status of that file. See "Content File Status" on page 8-9 for more information.

Figure A–13 Offline Files Panel of Select Content Dialog



Element	Description
	Click the Search icon to open the Search page (see "Select Content: Search" on page A-17).
	Click the Browse icon to open the Browse page (see "Select Content: Browse" on page A-20).
	This is the icon of the current dialog.

Element	Description
Name	This column shows the name of each offline file, listed by content server. You can toggle the sort order of the file names within each server (ascending or descending) by clicking the column header.
Location	This column shows the location of each offline file in the contribution folder hierarchy, listed by content server. You can toggle the sort order of the locations within each server (ascending or descending) by clicking the column header.
Edit / View	These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the Oracle UCM menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application. If you select a file for **editing**, it is opened in the current Office application and checked out of the content server. You can make changes as required. When you are done and you close the document or application, you are given the opportunity to check the file back in to the content server as a new revision of the original file. If you select a file for **viewing**, it is opened in the current Office application as a copy of the original file, which is not checked out of the content server. You can make changes as required, but when you are done and you close the document or application, you need to save it as a new file, either locally (using the application's built-in save-as feature) or on the content server (using the Save As New... option on the Oracle UCM menu or ribbon).
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and open the selected file in the current office application.
Cancel	Click this button to close the dialog without selecting a file.

A.10 Save Dialog (Save As New)

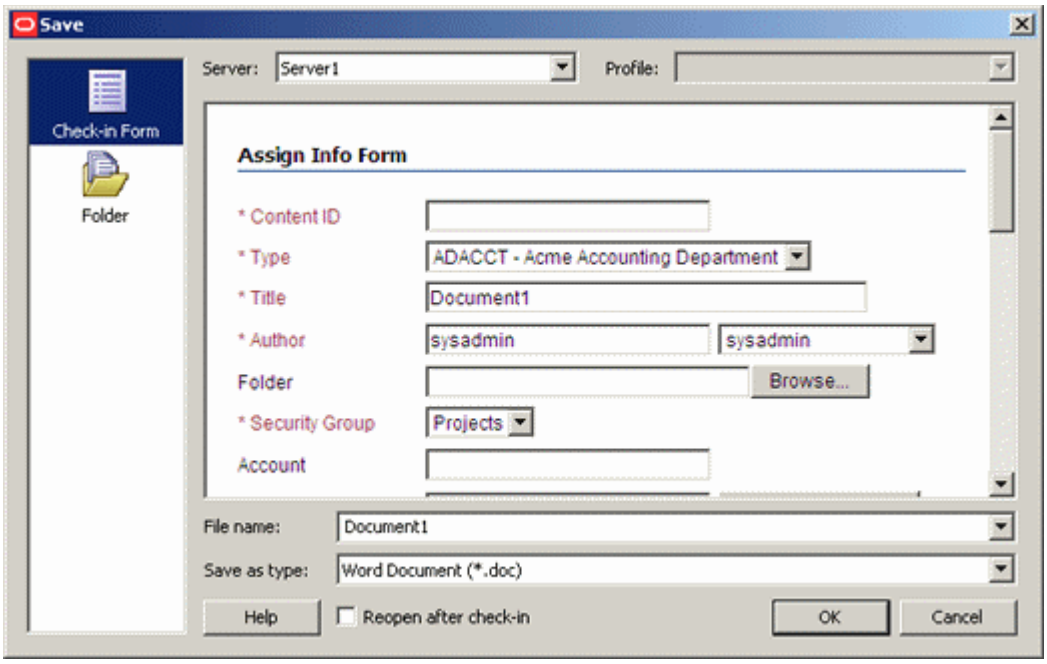
The Save dialog is used to save the current document in a Microsoft Office application and check it in to a content server as a new content item. This dialog has two pages, each representing a way to check in a file:

- **Check-in Form:** This page enables you to check the file in to an Oracle Content Server instance using a check-in form on that server. See "Save: Check-in Form" on page A-23 for more information.
- **Folder:** This page enables you to check the file in to a content server by saving it into a folder on that server. See "Save: Folder" on page A-25 for more information.

A.10.1 Save: Check-in Form

The Check-in Form panel of the Save dialog is used to check the currently open Microsoft Office file in to an Oracle Content Server instance as a new content item using a check-in form on that server.

Figure A–14 Check-In Form Panel of Save Dialog



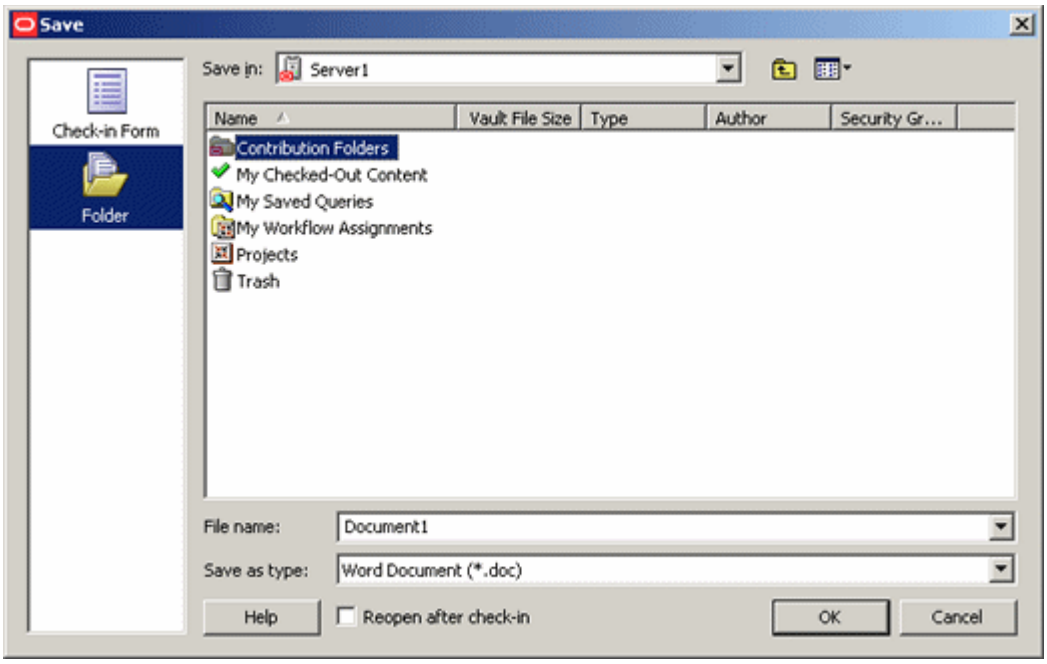
Element	Description
	This is the icon of the current dialog.
	Click the Folder icon to open the Folder page (see "Save: Folder" on page A-25).
Server	Select the content server that you want to check the item in to. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration). Please note that the list of available servers only includes Oracle Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle Content Server check-in functionality.
Profile	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. Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers. Contact your content server administrator if you need any assistance.

Element	Description
Check-in form	This is the standard content check-in form on an Oracle Content Server instance, where you assign metadata to the item before checking it in to the server. 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). The default **title** is the current file name (for existing files; for example, "Your Proposal.doc") or the default name for new documents (for unsaved files; for example, 'Document1' for Microsoft Word). Please note that the title and file name are not linked; that is, if you modify the title, the file name does not automatically change with it (and vice versa). 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 item cannot be checked in if any of these fields is empty.
File name	Enter the file name of the item to be checked in to the content server. The default file name is the current file name (for existing files) or the default name for new documents (for unsaved files; for example, 'Document1' for Microsoft Word). By default, the title is the same as the file name. Please note that the file name and title are not linked; that is, if you modify the file name, the title does not automatically change with it (and vice versa).
Save as type	Select the file type that you want to save the file as (and check it in to the content server). The available options depend on the application that you are working in. For example, you can save Microsoft Word files as standard Word documents (.doc), XML files (.xml), single-file web pages (.mht), document templates (.dot), Rich Text Format files (.rtf), or plain text files (.txt).
Reopen after check-in	After a file is checked in to the content server, it is closed in the Microsoft Office application. Select this 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.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and check the file in to the content server using the metadata specified.
Cancel	Click this button to close the dialog without check the file in to the content server.

A.10.2 Save: Folder

The Folder panel of the Save dialog is used to check the file currently open in Microsoft Word, Excel, or PowerPoint in to a content server by assigning it to a folder in the folder hierarchy on that server.

Figure A–15 Folder Panel of Save Dialog



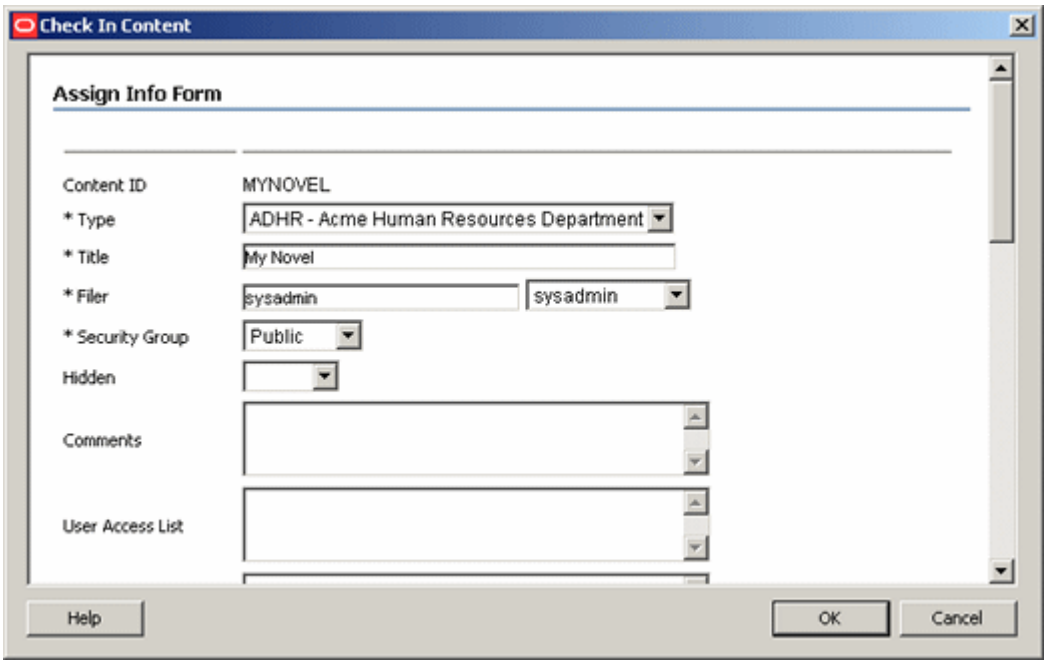
Element	Description
	Click the Check-in Form icon to open the content check-in form (see "Save: Check-in Form" on page A-23).
	This is the icon of the current dialog.
Save in	Select the content server that you want to check the item in to. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration).
	Click this icon to move up one level in the integration hierarchy.
	Click this icon to select the view mode of the content area: ▪ **Icons:** This view mode displays your files and folders as large application icons with their names shown below the icons. ▪ **List:** This view mode displays your files and folders as a list of file or folder names preceded by small application icons. ▪ **Details:** This view mode displays your files and folders as in list mode, but with additional information such as file type, size, author, security group, timestamp, and the like (if available and relevant).
Content area	This area shows the contents of the selected server or folder in the integration hierarchy. You can navigate to the contribution folder that you want check the current file in to. Some folders may be read-only and you cannot save files to these folders (for example, My Checked-Out Content and My Saved Queries on Oracle Content Server instances).

Element	Description
File name	Enter the file name of the item to be checked in to the content server. The default file name is the current file name (for existing files) or the default name for new documents (for unsaved files; for example, 'Document1' for Microsoft Word). The title of the checked-in file will be identical to file name.
Save as type	Select the file type that you want to save the file as (and check it in to the content server). The available options depend on the application that you are working in. For example, you can save Microsoft Word files as standard Word documents (.doc), XML files (.xml), single-file web pages (.mht), document templates (.dot), Rich Text Format files (.rtf), or plain text files (.txt).
Reopen after check-in	After a file is checked in to the content server, it is closed in the Microsoft Office application. Select this 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.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and check the file in to the content server in the selected folder.
Cancel	Click this button to close the dialog without check the file in to the content server.

A.11 Check In Content Dialog (Check In With Metadata)

The Check In Content dialog is used to check an existing content item that is open in Microsoft Office file back in to an Oracle Content Server instance (as a new revision). It enables you to modify the metadata of the file before checking it in to the server.

Figure A–16 Check In Content Dialog (Check In With Metadata)

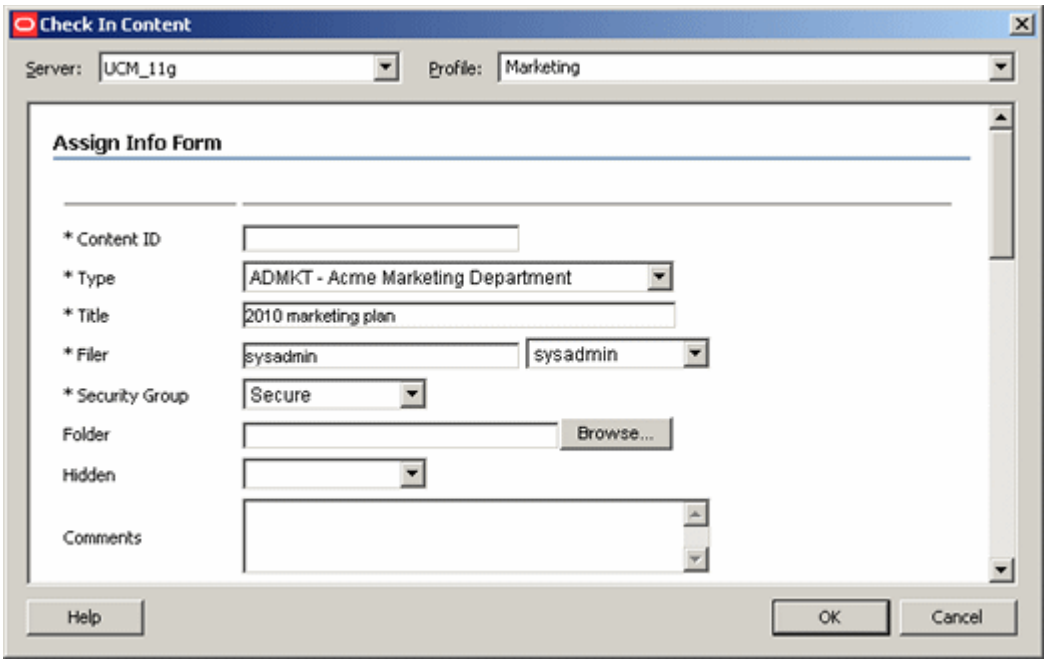


Element	Description
Check-in form	This is the standard content check-in form on an Oracle Content Server instance, where you assign metadata to the item before checking it in to the server. You can use the **Reset** button at the bottom of the form to revert the form to its initial state (that is, remove any data that you entered on the form). You cannot change the **content ID**, since this is an existing item on the content server that already has a content ID assigned to it. 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. If you change the **security group**, you may change the availability of the content item to other users. (A content item is available only to users who have access privileges to the security group that item is assigned to.) All mandatory metadata fields are marked with an asterisk (*). The item cannot be checked in if any of these fields is empty.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and check the file in to the content server using the metadata specified.
Cancel	Click this button to close the dialog without check the file in to the content server.

A.12 Check In Content Dialog (E-mail)

The Check In Content dialog is used to check an e-mail message from your e-mail application (Microsoft Outlook or Lotus Notes) in to an Oracle Content Server instance as a new content item. You must first provide some metadata before the e-mail message is checked in to the server.

Figure A–17 Check In Content Dialog (E-mail)



Element	Description
Server	Select the content server that you want to check the item in to. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration). Please note that the list of available servers only includes Oracle Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle Content Server check-in functionality.
Profile	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. Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers. Contact your content server administrator if you need any assistance.

Element	Description
Check-in form	This is the standard content check-in form on an Oracle Content Server instance, where you assign metadata to the item before checking it in to the server. 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). The following defaults are used for some of the metadata fields: ■ **Title:** For e-mail messages, the title defaults to the subject line of the e-mail message (unless your server administrator changed the configuration to use the e-mail 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 or Originator:** This is the sender of the e-mail message ('From' field), as retrieved from the e-mail header. (Please note that the Author field in the form shows the content server user who is checking in the e-mail message.) ■ **Addressee(s):** This is the recipients of the e-mail messages ('To' field), as retrieved from the e-mail header. ■ **Other Addressee(s):** These are the additional recipients of the e-mail message ('Cc' field), if any, as retrieved from the e-mail header. Please note that any names in the 'Bcc' field are ignored. ■ **Email Subject:** This is the subject line of the e-mail message, as retrieved from the e-mail header. Some of these metadata fields may not be visible depending on the content server configuration. Other metadata fields may also have default values if you set up Desktop Integration Suite to "remember" the metadata used for the last check-in of an e-mail or attachment. See "Setting Metadata To Be Remembered for Form-Based Check-ins" on page 7-12 for more information. 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 e-mail message cannot be checked in if any of these fields is empty. As noted above, the default title is the subject line of the e-mail (for example, "RE: Your proposal/plan"). By default, the file name of the checked-in e-mail is the title in the check-in form (with characters not allowed in Windows file names replaced by spaces; for example, "RE Your proposal plan.msg"). However, your server administrator may have changed the configuration to use the e-mail message ID as the file name.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and check the e-mail message in to the content server using the metadata specified. You check in one e-mail 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 the next item to be checked in.

Element	Description
Cancel	Click this button to close the dialog without checking the e-mail message in to the content server. If you selected multiple messages or if attachments will be checked in separately, the Check In Content dialog will reopen for the next item to be checked in.

A.13 Check In Content Dialog (Drag and Drop)

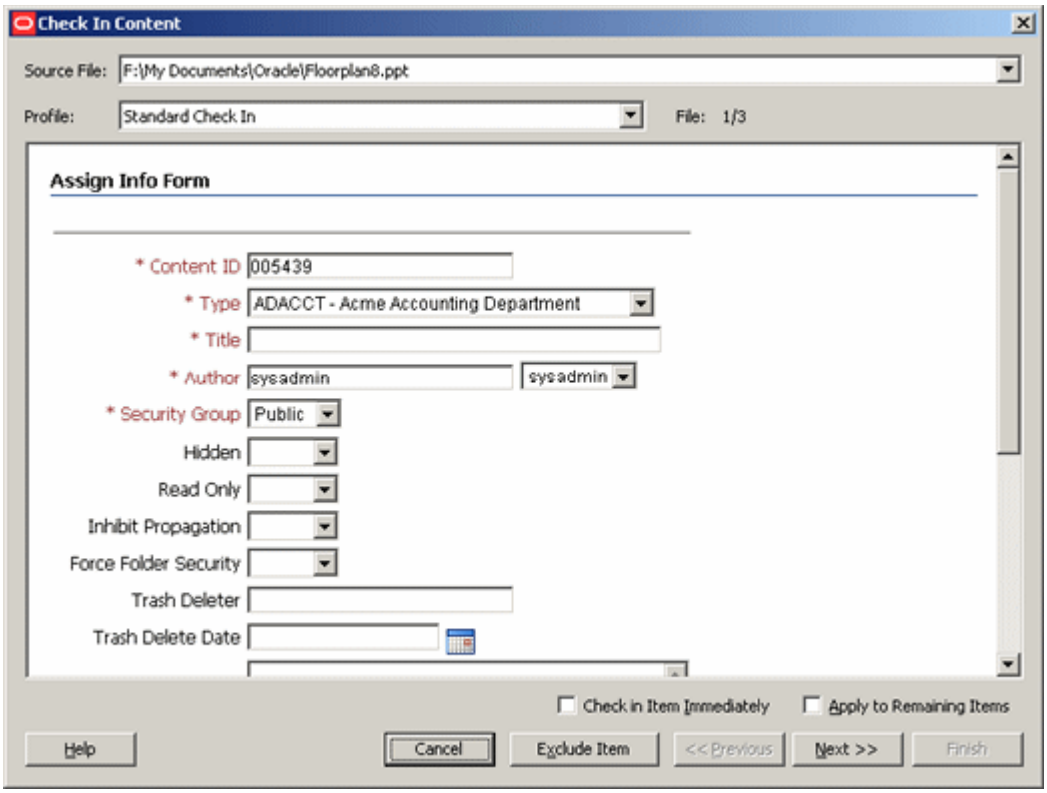
The Check In Content dialog is used to provide metadata for one or more new files that you drag and drop into a contribution folder on an Oracle Content Server instance, before these files are checked in to the content server from your local computer, network share, or other content server. A file is considered new if the folder does not yet contain a file of the same name. After you provide the metadata, each file is checked in to the content server as a new content item using the metadata provided.

If you drag and drop an existing file into a contribution folder (that is, the folder already contains a file of the same name), you are not prompted for metadata and the file is automatically checked in to the content server as a new revision of the existing file (inheriting the metadata of the existing file).

> **Note:** For this dialog to appear for new files, the "Enable Metadata Prompts" property must be enabled for the contribution folder (see "Hierarchical Folder Information Page" on page A-14). Otherwise, a new file is always checked in to the content server automatically using the default metadata for the contribution folder (as defined by the content server administrator).

You can drag and drop individual files into a contribution folder, but also multiple files (file batches). If you are checking in multiple files, you can specify metadata for each individual file or for files as a group. Please note that the title is always considered a property specific to a file and is never automatically shared between files, even if you are specifying metadata for groups of files.

Figure A–18 Check In Content Dialog (Drag and Drop)



Element	Description
Source File	This field shows the full path and file name of the current file. You can use the dropdown list to select a different file in a batch (if multiple files are dragged and dropped into the contribution folder). This field is not available if the "Apply to Remaining Items" check box is selected.
Profile	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. Please note that profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers. Contact your content server administrator if you need any assistance.
File	This shows the number of current files as well as the total number of files in the current batch (for example, "1/4," which means that this is the first file of a total of four new files to be checked in to the content server).

Element	Description
Check-in form with metadata fields	This is the standard content check-in form on an Oracle Content Server instance, where you assign metadata to the item or items before checking them in to the server. 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). 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 item cannot be checked in if any of these fields is empty. You can specify metadata for multiple files at the same time by selecting the "Apply to Remaining Items" check box. The **content ID** is provided automatically. You can modify it, but beware that the content ID must be unique for all items on the content server. You will see an error message if you attempt to check in a new content item using an existing content ID. The default **title** is the file name; that is, if you do not specify a title, the file name is used (for example, *Your Document.doc*). For e-mail messages, the default title is the subject line (for example, *RE: Your message*). You may change the title if you want. Please note that the content ID and title are always considered properties specific to a file and are never automatically propagated to other files, even if you specify a content ID or title with the "Apply to Remaining Items" check box selected.
Check in Item Immediately	Select this check box if you want to upload the current file and check it in to the content server immediately when you click **Next** to move to the next file in a batch of files (rather than check in the entire batch by clicking **Finish**). This check box is available only if multiple files are being checked in to the content server.
Apply to Remaining Items	Select this check box if you want the current metadata (except for the content ID and title) to be applied to all remaining files in the batch whose metadata has not yet been specified. Please note that the title is always considered a property specific to a file and is never automatically propagated to other files, even if you specify a title with this check box selected. This check box is available only if multiple files are being checked in to the content server.
Cancel	Click this button to close the dialog without checking any remaining files in to the content server.
Exclude Item	Click this button to remove the current file from the list of files to be checked in to the content server. You will be prompted to confirm the action. This check box is available only if multiple files are being checked in to the content server.
<< Previous	Select this button to move to the previous file in the batch that has not yet been checked in.
Next >>	Select this button to move to the next file in the batch that has not yet been checked in.
Finish	Click this button to close the dialog and check all files in to the content server that have not yet been checked in.

Element	Description
Help	Click this button to display context-sensitive help information for this dialog.

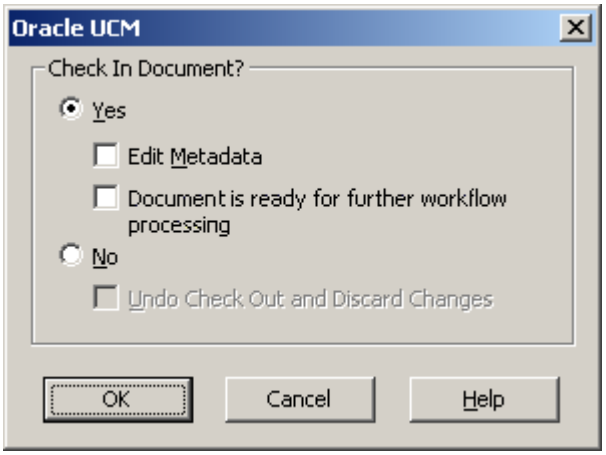
A.14 Check In Document Dialog

The Check In Document dialog enables you to decide what to do with a checked-out file in Microsoft Word, Excel, or PowerPoint, when that file or the application is closed.

This dialog appears if the current file does not have any unsaved changes. If there are unsaved changes, a slightly different dialog is displayed (see "Save Changes and Check In Document Dialog" on page A-36).

Note: The 'Edit Metadata' setting is remembered in between sessions. This means that it will match whatever you chose the last time you saved a managed content item.

Figure A–19 Check In Document Dialog



Element	Description
Check In Document? (Yes/No)	Select **Yes** if you want to check the document in to the content server as a new revision. Select **No** if you do not want to check the document in to the content server.
Edit Metadata	This check box is available only if the current file is checked out of an Oracle Content Server instance, not an Oracle Content Database server or other WebDAV server. If you select this check box, you will be prompted to update the metadata of the file before it is checked in to the content server. The Save dialog is opened showing a check-in form, where you can update the file metadata, if required (see "Check In Content Dialog (Check In With Metadata)" on page A-27). When you are ready, click **OK** in the Save dialog to submit the file to the content server.

Element	Description
Document is ready for further workflow processing	This check box is displayed only if the file is currently in a workflow and you were assigned editing privileges for this workflow item. Select this check box if you are done editing the file and want to release it for further processing in the workflow after it is checked in to the content server as a new revision. Specifically, the document revision moves from the Edit to the GenWWW state and is ready to go to the next step in the workflow. Please note that you still need to approve the file in the integration hierarchy before it actually moves to the next workflow step. See "Approving or Rejecting Files in Workflows" on page 8-40 for more information. Clear this check box if you are not done editing the file, which means it is checked in to the content server as a new revision, but remains in the current workflow step, enabling you to retain ownership of the file. (The file remains in Edit mode and does not move to the GenWWW state.)
Undo Check Out and Discard Changes	Select this check box if you want to close the file without saving the changes and checking it in to the content server. In addition, the checked-out status of the file is canceled on the server. This check box is available only if the content item is currently checked out.
OK	Click this button to close the dialog and process the file in accordance with your choices. The file is closed in the Microsoft Office application.
Cancel	Click this button to close the dialog without doing anything to the file. The file remains open in the Microsoft Office application.
Help	Click this button to display context-sensitive help information for this dialog.

The table below lists all possible save scenarios, with an explanation of what happens for each of them.

> **Note:** If the document is currently in a workflow on Oracle Content Server, then the dialog includes an option called 'Document is ready for further workflow processing'. Select this option to move the document to the next step in the workflow after checking it back in to the server.

Check In	Edit Metadata	Undo Check-Out	Action
Yes	No	n/a	The file 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 file has been checked in to the content server, it is closed in the Microsoft Office application.

Check In	Edit Metadata	Undo Check-Out	Action
Yes	Yes	n/a	You are given an 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 file has been checked in to the content server, it is closed in the Microsoft Office application.
No	n/a	No	The file is not checked in to the content server, and 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. The file is stored in a special cache on your local computer (see "Local Caching of Content Files" on page 8-7). You can reopen the file from the Select Content dialog (see "Select Content: Offline Files" on page A-22) or using the Offline Content Manager. After the file has been saved to the local cache, it is closed in the Microsoft Office application. 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).
No	n/a	Yes	Any changes to the file are discarded, and the file 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.

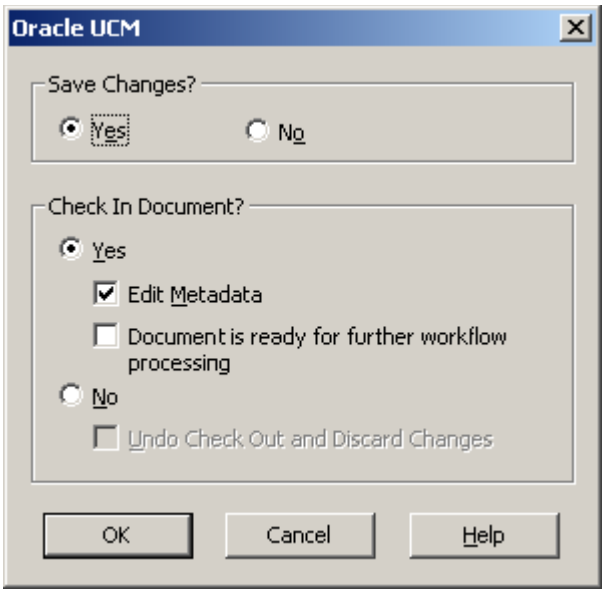
A.15 Save Changes and Check In Document Dialog

The Save Changes and Check In Document dialog enables you to decide what to do with a checked-out file in a Microsoft Office application, when that file or the application is closed.

This dialog appears if the current file has unsaved changes. If there are no unsaved changes, a slightly different dialog is displayed (see "Check In Document Dialog" on page A-34).

Note: The 'Edit Metadata' setting is remembered in between sessions. This means that it will match whatever you chose the last time you saved a managed content item.

Figure A–20 Save Changes and Check In Document Dialog



Element	Description
Save Changes? (Yes/No)	This section is shown only if your document has any unsaved changes. You can decide whether you want to save the changes or discard them. Select **Yes** if you want to save the changes you made. Select **No** if you want to discard the changes you made.
Check In Document? (Yes/No)	Select **Yes** if you want to check the document in to the content server as a new revision. Select **No** if you do not want to check the document in to the content server. You cannot check in the file if you choose not to save the changes.
Edit Metadata	This check box is available only if the current file is checked out of an Oracle Content Server instance, not an Oracle Content Database server or other WebDAV server. If you select this check box, you will be prompted to update the metadata of the file before it is checked in to the content server. The Save dialog is opened showing a check-in form, where you can update the file metadata, if required (see "Check In Content Dialog (Check In With Metadata)" on page A-27). When you are ready, click **OK** in the Save dialog to submit the file to the content server.

Element	Description
Document is ready for further workflow processing	This check box is displayed only if the file is currently in a workflow and you were assigned editing privileges for this workflow item. Select this check box if you are done editing the file and want to release it for further processing in the workflow after it is checked in to the content server as a new revision. Specifically, the document revision moves from the Edit to the GenWWW state and is ready to go to the next step in the workflow. Please note that you still need to approve the file in the integration hierarchy before it actually moves to the next workflow step. See "Approving or Rejecting Files in Workflows" on page 8-40 for more information. Clear this check box if you are not done editing the file, which means it is checked in to the content server as a new revision, but remains in the current workflow step, enabling you to retain ownership of the file. (The file remains in Edit mode and does not move to the GenWWW state.)
Undo Check Out and Discard Changes	Select this check box if you want to close the file without saving the changes and checking it in to the content server. In addition, the checked-out status of the file is canceled on the server. This check box is available only if the content item is currently checked out.
OK	Click this button to close the dialog and process the file in accordance with your choices. The file is closed in the Microsoft Office application.
Cancel	Click this button to close the dialog without doing anything to the file. The file remains open in the Microsoft Office application.
Help	Click this button to display context-sensitive help information for this dialog.

The table below lists all possible save scenarios, with an explanation of what happens for each of them.

Note: If the document is currently in a workflow on Oracle Content Server, then the dialog includes an option called 'Document is ready for further workflow processing'. Select this option to move the document to the next step in the workflow after checking it back in to the server.

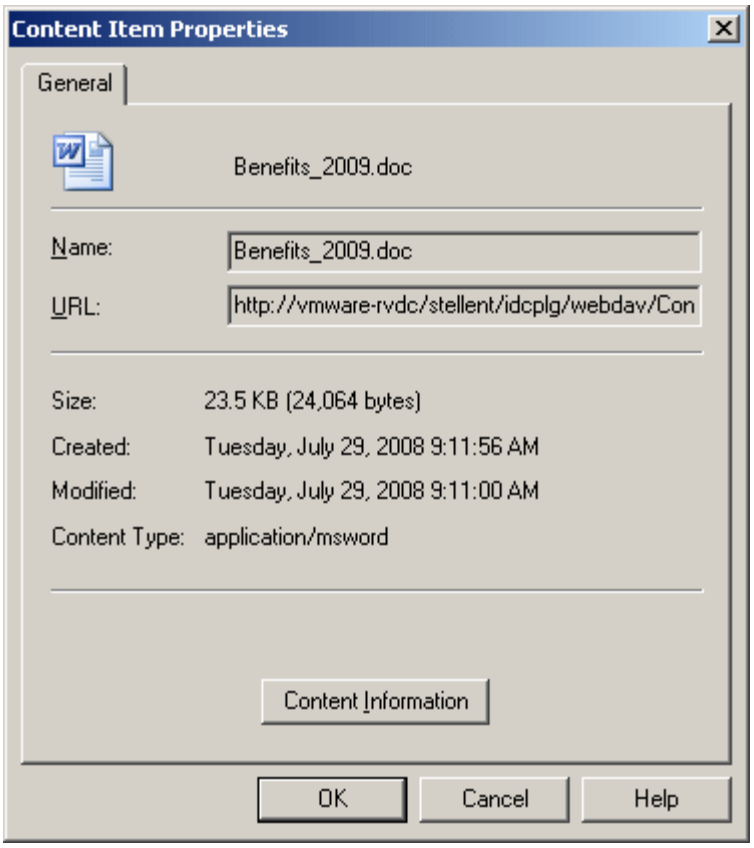
Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Yes	Yes	No	n/a	The changes to the file are saved and the file is automatically checked in to the content server as a new revision of the existing content item, inheriting all metadata from the previous revision. After the file has been checked in to the content server, it is closed in the Microsoft Office application.

Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Yes	Yes	Yes	n/a	The changes to the file 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 file has been checked in to the content server, it is closed in the Microsoft Office application.
Yes	No	n/a	n/a	The changes to the file are saved, but the file is not checked in to the content server. This means that other users on the server cannot check out the file until you check it back in or undo the check-out. The file is stored in a special cache on your local computer (see "Local Caching of Content Files" on page 8-7). You can open the file from the Select Content dialog (see "Select Content: Offline Files" on page A-22) or using the Offline Content Manager. After the file has been saved to the local cache, it is closed in the Microsoft Office application. 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).
No	No	n/a	No	The changes to the file are discarded and the file is not checked in to the content server. This means that other users on the server cannot check out the file until you check it back in or undo the check-out. The file is stored in a special cache on your local computer (see "Local Caching of Content Files" on page 8-7). You can open the file from the Select Content dialog (see "Select Content: Offline Files" on page A-22) or using the Offline Content Manager. After the file has been saved to the local cache, it is closed in the Microsoft Office application.
No	No	n/a	Yes	The changes to the file are discarded and the file 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.

A.16 Content Item Properties Dialog

The Content Item Properties dialog provides information about a file managed by a content server. None of the information in this dialog can be edited.

Figure A–21 Content Item Properties Dialog

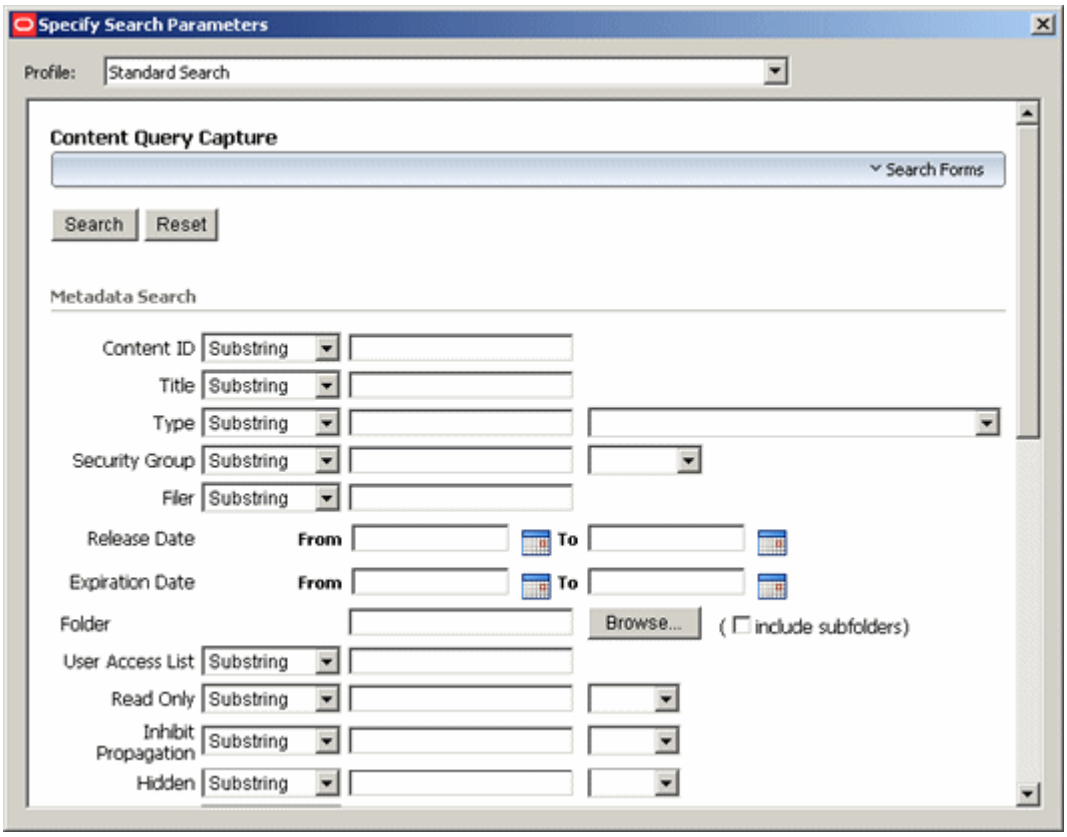


Element	Description
Name	This is the file name of the content item.
URL	This is the WebDAV URL of the content item.
Size	This is the file size of the content item.
Created	This is the date and time that the content item was created.
Modified	This is the date and time that the content item was last modified.
Content Type	This is the content type of the content item in the form of its MIME type; for example, 'application/msword' for Microsoft Word documents.
Content Information	This button is displayed for servers of type 'UCM Content Server' only (that is, Oracle Content Server instances). Click this button to open the standard content information page for the item, as retrieved from the content server.
OK	Click this button to close the dialog.
Cancel	Click this button to close the dialog.
Help	Click this button to display context-sensitive help information for this dialog.

A.17 Content Query Capture Dialog

The Content Query Capture dialog is used to search for content items on the content server that meet specific criteria. This page is essentially the standard Oracle Content Server search form. It provides a number of fields as well as a **Search** button to perform the search query based on the specified criteria.

Figure A–22 Content Query Capture Dialog



If any profiles are defined on the content server, you can select the **profile** that should be applied to the search form. Content profiles are used to limit the metadata fields shown on the search 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.

> **Note:** Profiles are available only if you are connecting to Oracle Content Server 11*g*R1. They are not available for 10*g*R3 or 7.5.2 servers. Contact your content server administrator if you need any assistance.

Depending on the content server configuration, you may be able to perform searches based on metadata (that is, information about files), full text (that is, text contained in the actual files), or a combination of both. For more details on searching for content items on the content server, see the Oracle Content Server documentation.

Specify the search criteria and click **Search** to perform the query. A list of all content items that meet the specified criteria is available under **Search Results** for the current

content server in Windows Explorer. Open that folder to view the search results in the content pane.

A.18 Insert Content Item Dialog

The Insert Content Item dialog is used to select a file on an Oracle Content Server instance for insertion into the current Microsoft Office document (Word, Excel, or PowerPoint). You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). This dialog comprises multiple pages, each representing a different item to insert:

- **Link:** This page enables you to select a file on a content server and insert a hyperlink to this file into the current Microsoft Office document. See "Insert Content Item: Link" below for more information.
- **File:** This page enables you to select a file on a content server and insert the contents of this file into the current Microsoft Office document. See "Insert Content Item: File" on page A-44 for more information.
- **Image:** This page enables you to select an image file on a content server and insert that image into the current Microsoft Office document. See "Insert Content Item: Image" on page A-46 for more information.

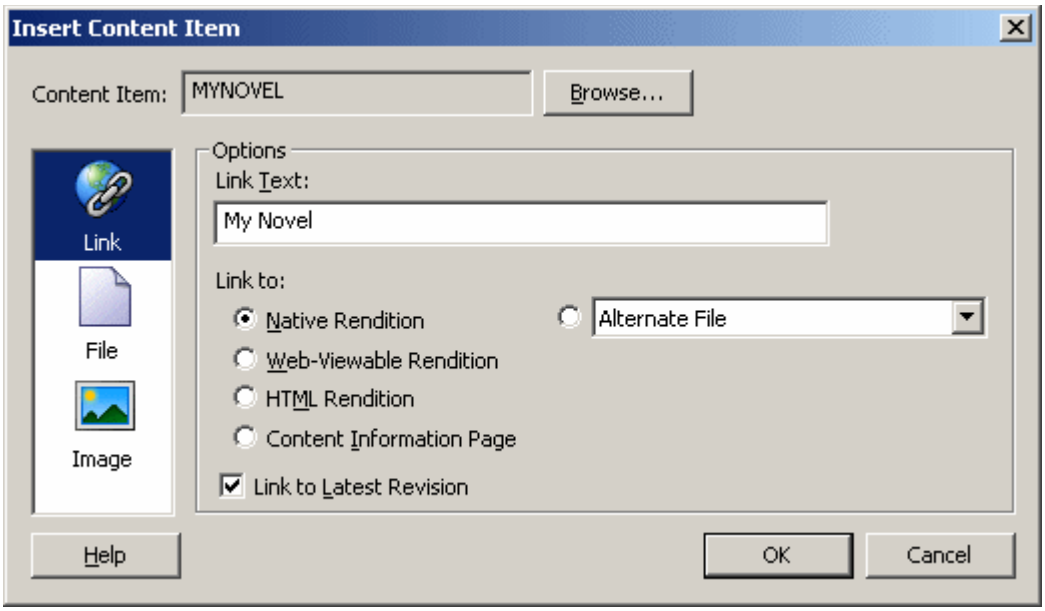
See also Chapter 10, "Inserting Managed Content Into Microsoft Office Files" for more information.

Note: You cannot insert content items from Oracle Content Database servers or other WebDAV servers.

A.18.1 Insert Content Item: Link

The Link panel of the Insert Content Item dialog enables you to select a file on an Oracle Content Server instance and insert a hyperlink to this file into the current Microsoft Office document. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). You can set the hyperlink text and also choose the file rendition and revision that the hyperlink should point to. The hyperlink is inserted at the current cursor position in the document.

Figure A–23 Link Panel of Insert Content Item Dialog



Element	Description
Content Item	This field shows the content ID of the selected file on a content server that the hyperlink will point to.
Browse	Click this button to open the Select Content dialog, where you can select a file on an Oracle Content Server instance. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). See "Select Content Dialog" on page A-17 for further details.
Link Text	This field shows the hyperlinked text that will be inserted into the current 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 required. If you provide no text at all, the link text will be the full URL to the selected link target.

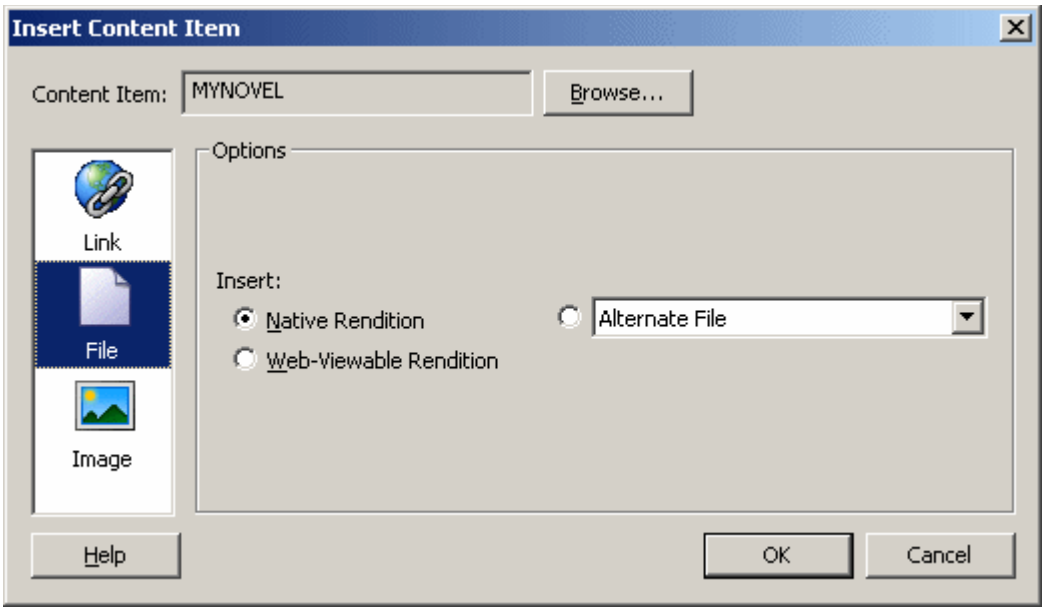
Element	Description
Link to	This lists all available file targets that the hyperlink can point to: ■ **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc files for Microsoft Word documents). ■ **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. Contributors may manually specify a file as the web-viewable rendition when checking a content item in to 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:** The list shows all custom renditions that may also be available on an Oracle 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 to Latest Revision	Select this check box if you want the hyperlink to 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. If you clear this check box, the hyperlink references a specific revision of the file, which means it will point to an older revision of the file if that file is updated on the content server.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and insert a hyperlink to the selected content item into the current Microsoft Office document.
Cancel	Click this button to close the dialog without doing anything.

A.18.2 Insert Content Item: File

The File panel of the Insert Content Item dialog enables you to select a file on an Oracle Content Server instance and insert the contents of that file into the current Microsoft Office document at the current cursor position. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). You can choose the file rendition that should be inserted (native or web-viewable).

Please note that the file contents are inserted statically; that is, there is no dynamic link between the file contents in the 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.

Figure A–24 File Panel of Insert Content Item Dialog



Element	Description
Content Item	This field shows the content ID of the selected file on the content server whose contents will be inserted in the current Microsoft Office document.
Browse	Click this button to open the Select Content dialog, where you can select a file on an Oracle Content Server instance. You search for the file using the standard search features on the content server (browsing or criteria-based query, if available). See "Select Content Dialog" on page A-17 for further details. When browsing to a file on the content server, you will, by default, only see files of formats that are appropriate for the current Office application (for example, *.doc, *.dot, and *.txt files when you are in Microsoft Word). You may choose to select a file of a different format (say, a .pdf or .xls file while in Microsoft Word), but that may result in the binary file data being inserted as text. Therefore, make sure that you select a file whose format is compatible with the current Office application (for example, native word-processing or text files when you are in Microsoft Word).

Element	Description
Insert	This lists all available file targets whose content can be inserted in the current Microsoft Office document: ■ **Native Rendition:** This inserts the contents of the native file; that is, the original file as created in its associated application (for example, .doc files for Microsoft Word documents). ■ **Web-Viewable Rendition:** This inserts the contents of a version of the original file that can be viewed in a web browser. Contributors may manually specify a file as the web-viewable rendition when checking a content item in to 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). If there is no web-viewable rendition, the native rendition is inserted. ■ **Other renditions:** The list shows all custom renditions that may also be available on an Oracle 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. The file formats that can be successfully inserted into your Office document depend on the configuration of your computer and Microsoft Office (installed conversion filters and the like). Desktop Integration Suite's insertion features work exactly the same as the native insertion features of the Office application you are working in (from the Insert menu). The only difference is that you can insert files from a content server rather than your local computer. See your Office application help for more information on inserting files into your Office document. Files that are compatible with the application can generally be inserted successfully (for example, .doc or .txt into Word, and .xls or .csv into Excel), but other files may not. If you insert a non-compatible file (for example, a JPEG file into a Word document), it will be included as a series of characters rendered from the binary file. If you want to insert an image, make sure that you go to the Image page (see "Insert Content Item: Image" on page A-46) and select an image file there.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and insert the contents of the selected content item into the current Microsoft Office document.
Cancel	Click this button to close the dialog without doing anything.

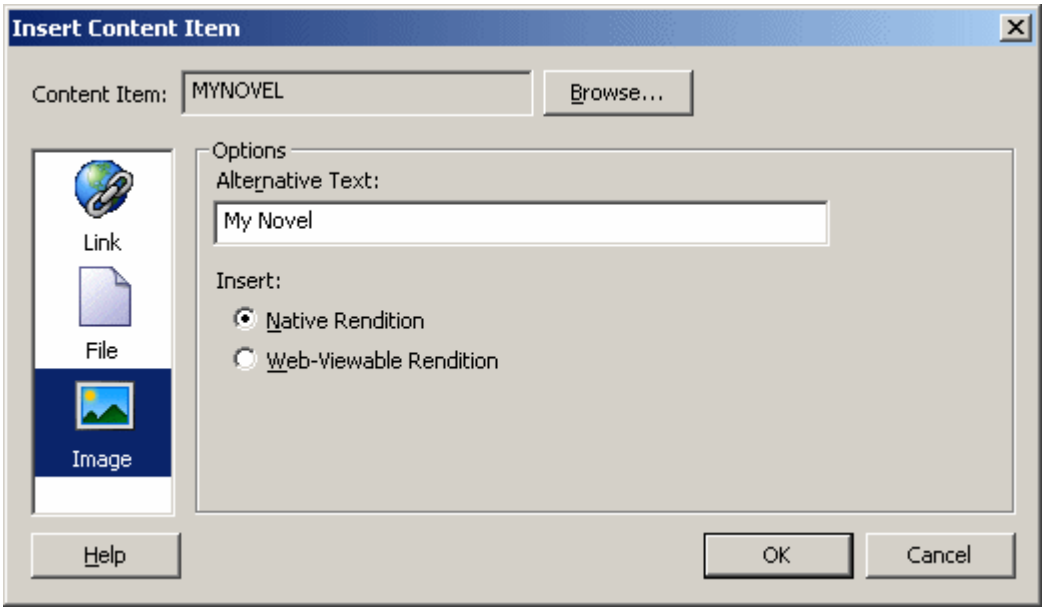
A.18.3 Insert Content Item: Image

The Image panel of the Insert Content Item dialog enables you to select an image file on an Oracle Content Server instance and insert that image into the current Microsoft Office document. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). You can choose the file rendition that should be inserted and also provide alternative text (that is, the text that appears when you hover the mouse cursor over the image in a web environment). The image is inserted at the current cursor position in the Office document, in line with text.

Please note that the inserted image is not linked to its content item on the server. This means that the image in the document is not updated automatically if the source image is updated on the content server, or vice versa.

You can select any file on the content server, but only graphic files can be successfully inserted into the Microsoft Office document. The supported graphics file formats depend on the installed conversion filters for your Microsoft Office applications. If you select a non-graphic file (for example, a Word document), the Office application will attempt to convert it to a graphic. If this fails, an error is reported and nothing is inserted.

Figure A–25 Image Panel of Insert Content Item Dialog



Element	Description
Content Item	This field shows the content ID of the selected image file on the content server that will be inserted in the current Microsoft Office document.
Browse	Click this button to open the Select Content dialog, where you can select a file on an Oracle Content Server instance. You search for the file using the standard search features on the content server (browsing or criteria-based query, if available). See "Select Content Dialog" on page A-17 for further details.
Alternative Text	This is 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).

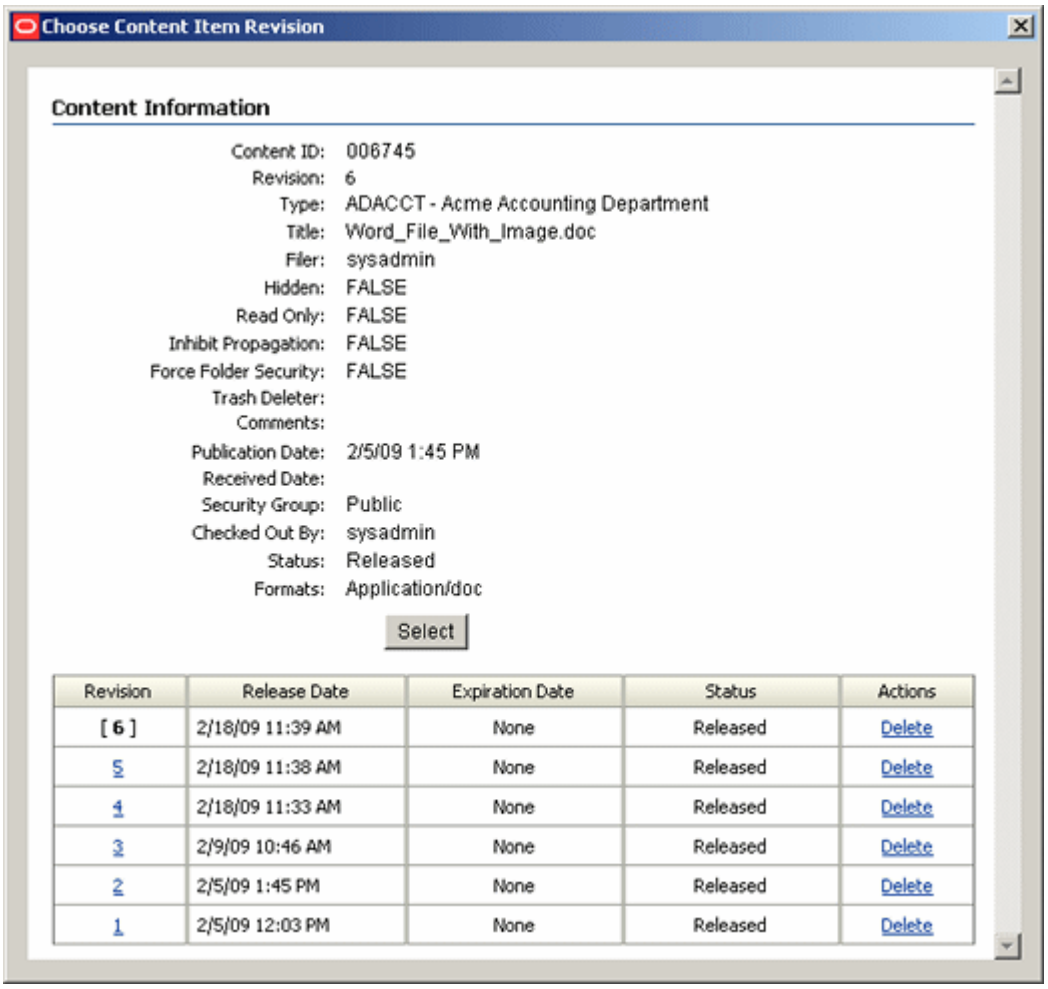
Element	Description
Insert	This lists all available file targets whose content can be inserted in the current Microsoft Office document: ■ **Native Rendition:** This inserts the contents of the native image file; that is, the original file as created in its associated application. If you select this option, make sure that it is a graphic file (for example, .bmp, .tif, .gif, or .jpg). ■ **Web-Viewable Rendition:** This inserts the contents of a version of the original image file that can be viewed in a web browser. Contributors may manually specify a file as the web-viewable rendition when checking a content item in to 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 JPG version or reduced thumbnail). ■ **Other renditions:** The list shows all custom renditions that may also be available on an Oracle 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.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and insert the selected image file into the current Microsoft Office document.
Cancel	Click this button to close the dialog without doing anything.

A.19 Choose Content Item Revision Dialog

The Choose Content Item Revision dialog enables you to select a revision of a Word document on the content server that you want to compare with the revision of that document that is currently open in Microsoft Word.

See also Chapter 11, "Comparing Managed Microsoft Word Documents" for more information.

Figure A–26 Choose Content Item Revision Dialog

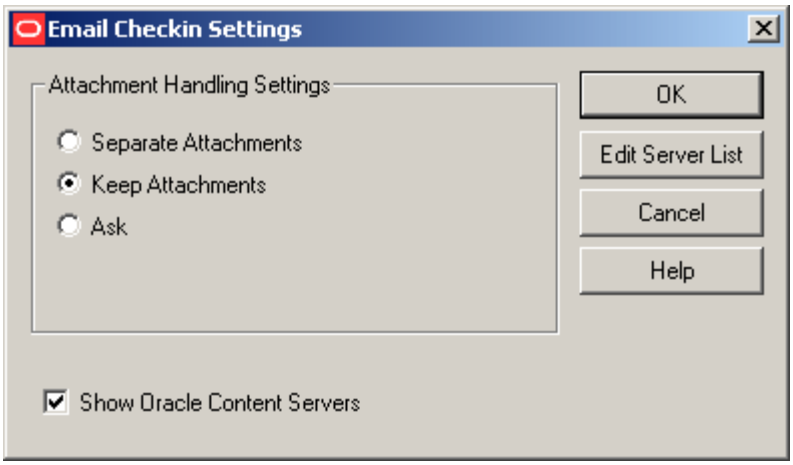


Element	Description
Content information fields	These fields provide information about the current content item revision, such as the content ID, title, author, security group, status, and so on.
Select	Click this button to select the current document revision and compare it with the revision currently open in Microsoft Word.
Revision history	This list shows all existing revisions of the current content item, along with their release date, expiration date, status, and available actions. The current revision is marked in the Revision column using straight brackets (for example, "[6]"), with the revision number not being hyperlinked. You can click another revision number to go to the content information page of that document revision.

A.20 Email Checkin Settings Dialog

The Email Checkin Settings dialog enables you to set some configuration options for checking e-mail messages in to the content server. You can specify how e-mail attachments are handled, and also whether the integration folders should be shown in the folders list of your e-mail client.

Figure A–27 Email Checkin Settings Dialog



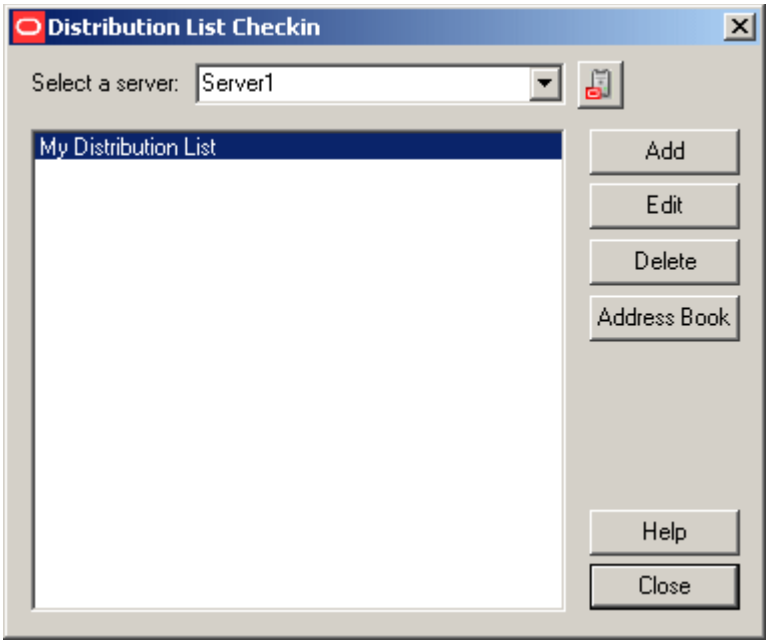
Element	Description
Attachment Handling Settings	Select the appropriate option to specify how attachments to e-mail messages should be handled when checking e-mail messages in to the content server: ▪ **Separate Attachments:** Each e-mail attachment is checked in to the content server as a separate item from the e-mail message, each with its own content ID. The body text of the checked-in e-mail message will include links to each of the checked-in attachments. ▪ **Keep Attachments:** The attachment is embedded in the e-mail message and both are checked in as a single content item with a single content ID. The attachment is embedded in the e-mail message. ▪ **Ask:** You are prompted to specify how each e-mail attachment should be handled every time you check in an e-mail message with one or more attachments. Please note that this setting only applies if you check in an e-mail using the Check In Mail Item feature in Microsoft Outlook or Lotus Notes, not if you drag and drop an e-mail into a contribution folder. In that case, e-mail is always checked in with its attachments embedded, regardless of this setting.
OK	Click this button to close this dialog and submit any changes you made.
Edit Server List	Click this button to open the Edit Server List dialog (see "Edit Server List Dialog" on page A-9), where you can view all defined content server connections, as well as add, modify, and delete connections.
Cancel	Click this button to close this dialog and cancel any changes you made.
Help	Click this button to display context-sensitive help information for this dialog.

Element	Description
Show Oracle Content Servers	Select this check box if you want the integration hierarchy to be shown in the folders list of your e-mail client (Microsoft Outlook or Lotus Notes). You must restart your e-mail application for the integration hierarchy to be displayed. You will see a folder called "Oracle Content Servers" at the bottom of the folders pane in your e-mail application. See Chapter 5, "Integration Into E-mail Clients" for more information.

A.21 Distribution List Checkin Dialog

The Distribution List Checkin dialog enables you to manage your e-mail distribution lists. It shows a list of all defined distribution lists for an Oracle Content Server instance, and you can add, edit, or delete distribution lists.

Figure A–28 Distribution List Checkin Dialog



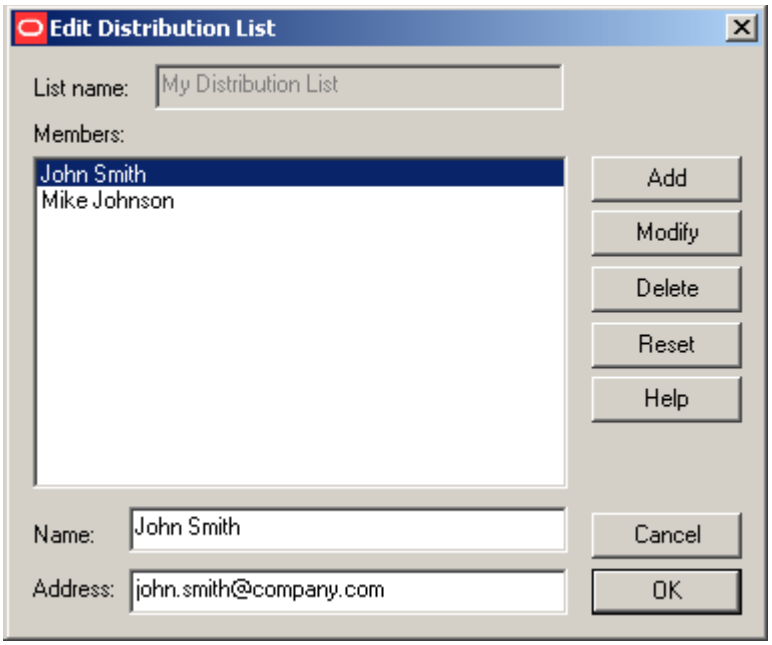
Element	Description
Select a server	This list includes all defined Oracle Content Server connections on your computer. You can switch between content servers by selecting a different item on the list. Please note that the list of available servers only includes Oracle Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration).
	Click this button to open the Edit Server List dialog (see "Edit Server List Dialog" on page A-9), where you can manage your defined content server connections.

Element	Description
Distribution list area	This area lists all defined e-mail distribution lists on the content server. You can select a distribution list and then edit or delete it.
Add	Click this button to open the Edit Distribution List dialog (see "Edit Distribution List Dialog" on page A-52), where you can define a new distribution list.
Edit	Click this button to open the Edit Distribution List dialog (see "Edit Distribution List Dialog" on page A-52), where you can edit the selected distribution list.
Delete	Click this button to delete the selected distribution list.
Address Book	Click this button to open the Check In Distribution List From Address Book dialog, where you can check in an e-mail distribution list that is based on an address book of your e-mail application. See "Check In Distribution List From Address Book Dialog" on page A-53 for more information.
Help	Click this button to display context-sensitive help information for this dialog.
Close	Click this button to close this dialog and submit any changes you made.

A.22 Edit Distribution List Dialog

The Edit Distribution List dialog enables you to manage the members of an e-mail distribution list. You can add new members, and edit or delete existing ones.

Figure A–29 Edit Distribution List Dialog

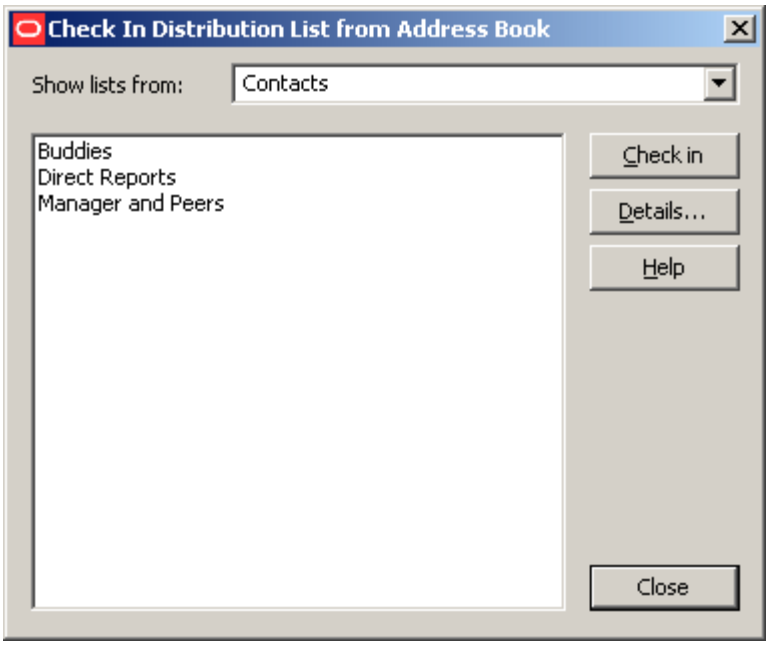


Element	Description
List name	This field shows the name of the currently selected e-mail distribution list. You cannot edit this information. If you want to manage a different e-mail distribution list, click Cancel to close this dialog and select the correct distribution list in the Distribution List Checkin dialog (see "Distribution List Checkin Dialog" on page A-51).
Members	This box lists all members currently included in the e-mail distribution list. If you select a member, its properties are shown in the name and address fields below the members list.
Name	This is the name of the selected member of the e-mail distribution list. You can edit the name and click Modify to submit the changes.
Address	This is the e-mail address of the selected member of the e-mail distribution list. You can edit the e-mail address and click Modify to submit the changes.
Add	Click this button to add a new member to the current e-mail distribution list. (Enter a new name and e-mail address first.)
Modify	Click this button to save the modified properties of the selected distribution list member. You can modify the name and/or e-mail address in the fields below the members list.
Delete	Click this button to delete the selected member from the e-mail distribution list.
Reset	Click this button to cancel any changes you made and return the dialog to the state when you opened it.
Help	Click this button to display context-sensitive help information for this dialog.
Cancel	Click this button to cancel any changes you made and close this dialog.
OK	Click this button to submit any changes you made, close this dialog, and open a check-in form for the distribution list.

A.23 Check In Distribution List From Address Book Dialog

The Check In Distribution List From Address Book dialog enables you to create an e-mail distribution list based on an address book in your e-mail application (Microsoft Outlook or Lotus Notes).

Figure A–30 Check In Distribution List From Address Book Dialog



Element	Description
Show lists from	This list includes all available e-mail address sources (for example, your organization's global address list or a personal address list). You can switch between sources by selecting a different item on the list.
Contacts box	This box shows all entries in the selected address list.
Check in	Click this button to check the e-mail distribution list in to the content server. You are directed to a content check-in form, where you can provide metadata for the distribution list before checking in the file.
Details...	Click this button to show the details of the selected e-mail list entry (full name, e-mail address, and the like).
Help	Click this button to display context-sensitive help information for this dialog.
Close	Click this button to close this dialog and submit any changes you made.

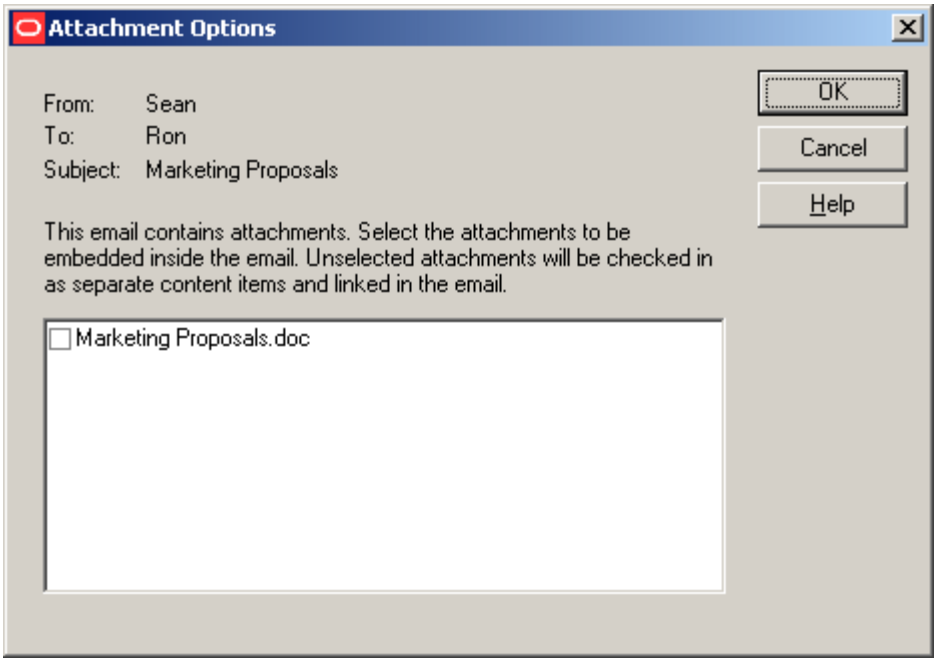
A.24 Attachment Options Dialog

The Attachment Options dialog enables you to specify how the attachments to a specific e-mail message should be handled when checking the e-mail message in to Oracle Content Server.

The file names of all detected attachments to the e-mail message are listed in the box. If you select the check box before an attachment, it is embedded into the e-mail message and checked in along with the message (all having the same content ID). If you do not select an attachment, it is checked in to the content server as a separate item from the e-mail message, each with its own content ID. The attachment is checked in first, followed by the e-mail message. You can check in an attachment by itself without checking in the e-mail message. After the attachment is checked in, simply cancel the content check-in form when it reappears for the e-mail check-in.

Note: You can avoid having to specify how e-mail attachments should be handled every time you check in an e-mail by modifying the setting on the Email Checkin Settings dialog (see "Email Checkin Settings Dialog" on page A-49).

Figure A–31 Attachment Options Dialog



Element	Description
From	This is the sender of the selected e-mail message (as specified in the "From" field of the message).
To	This is the recipient of the selected e-mail message (as specified in the "To" field of the message).
Subject	This is the subject of the selected e-mail message (as specified on the subject line of the message)
List of attachments	This list contains all detected attachments to the current e-mail message. Select the check box next to an attachment if you want to embed the attachment into the e-mail 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.
OK	Click this button to close this dialog and check the e-mail message and attachment(s) in to the content server as specified.
Cancel	Click this button to close this dialog. Nothing will be checked in to the content server.

A.25 Get Attachment Dialog

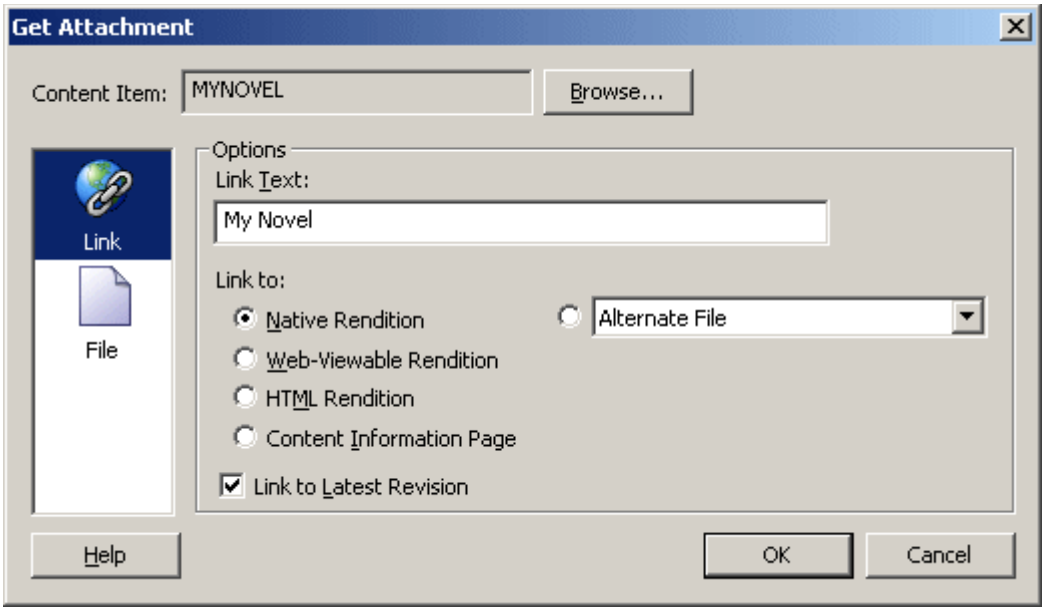
The Get Attachment dialog is used to retrieve a file from a content server and attach it to the current e-mail message. This dialog comprises multiple pages, each representing a different item to attach to the e-mail:

- **Link:** This page enables you to select a file on a content server and attach it to the current e-mail message. See "Insert Content Item: Link" below for more information.
- **File:** This page enables you to select a file on a content server and attach it to the current e-mail message. See "Insert Content Item: File" on page A-44 for more information.

A.25.1 Get Attachment: Link Panel

The Link panel of the Get Attachment dialog enables you to select a file on a content server and include a link to this file in the current e-mail message in your e-mail application. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). You can set the hyperlink text and also choose the file rendition and revision that the hyperlink should point to. The hyperlink is inserted at the current cursor position in the e-mail message.

Figure A–32 Link Panel of Get Attachment Dialog



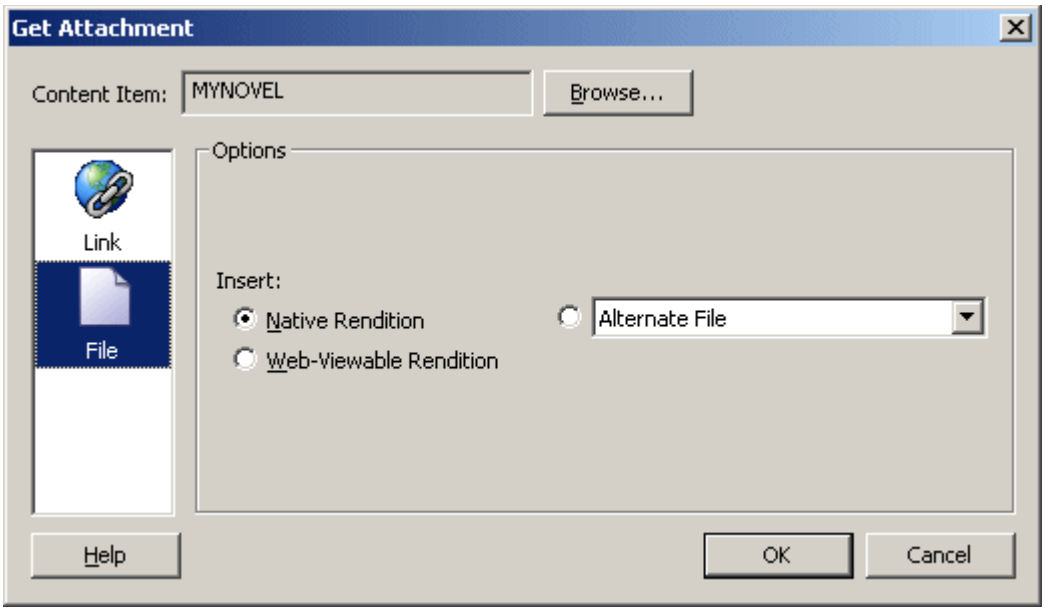
Element	Description
Content Item	This field shows the content ID of the selected file on the content server that the hyperlink will point to.
Browse	Click this button to open the Select Content dialog, where you can select a file on a content server. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). See "Select Content Dialog" on page A-17 for further details.
Link Text	This field shows the hyperlinked text that will be inserted into the current e-mail message. The default is the title of the selected content item (as stored on the content server), but you can modify this as required. If you provide no text at all, the link text will be the full URL to the selected link target.

Element	Description
Link to	This lists all available file targets that the hyperlink can point to: ■ **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc 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. Contributors may manually specify a file as the web-viewable rendition when checking a content item in to 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:** The list shows all custom renditions that may also be available on an Oracle 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 to Latest Revision	Select this check box if you want the hyperlink to 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. If you clear this check box, the hyperlink references a specific revision of the file, which means it will point to an older revision of the file if that file is updated on the content server.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and insert a hyperlink to the selected content item into the current e-mail message Office document.
Cancel	Click this button to close the dialog without doing anything.

A.25.2 Get Attachment: File Panel

The File panel of the Get Attachment dialog enables you to select a file on a content server and attach that file to the current e-mail message. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). You can choose the file rendition that should be attached (native or web-viewable).

Figure A–33 File Panel of Get Attachment Dialog

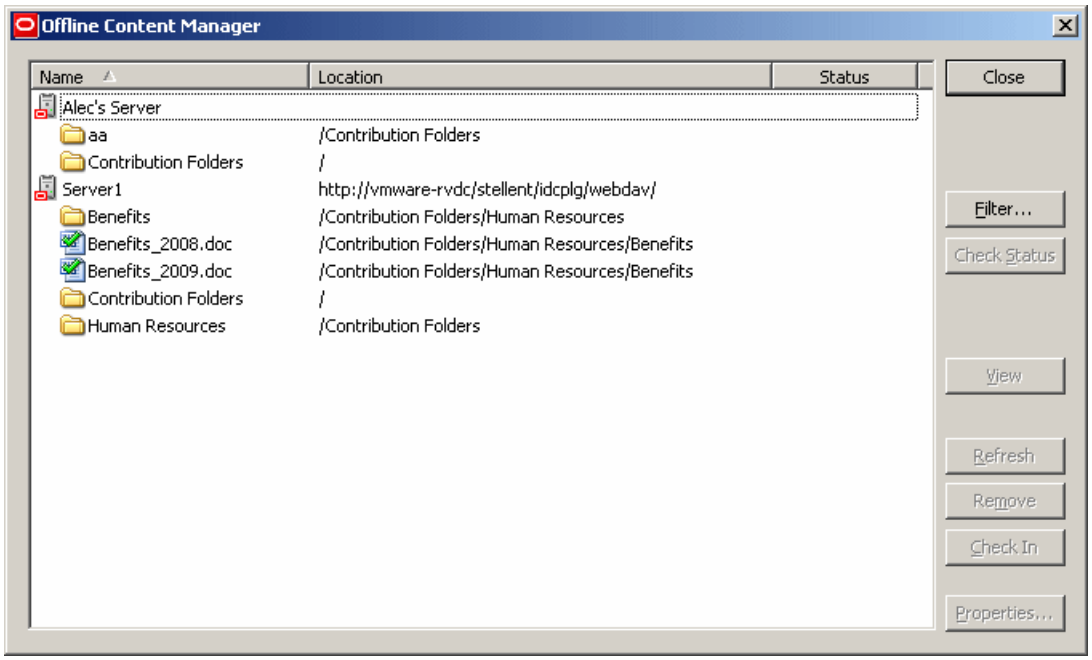


Element	Description
Content Item	This field shows the content ID of the selected file on the content server that will be attached to the current e-mail message.
Browse	Click this button to open the Select Content dialog, where you can select a file on a content server. You search for the file using the standard search features on the content server (browsing or criteria-based query, if available). See "Select Content Dialog" on page A-17 for further details.
Insert	This lists all available file targets whose content can be attached to the current e-mail message: ▪ **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc 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. Contributors may manually specify a file as the web-viewable rendition when checking a content item in to 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:** The list shows all custom renditions that may also be available on an Oracle 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.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and attach the selected content item to the current e-mail message.
Cancel	Click this button to close the dialog without doing anything.

A.26 Offline Content Manager Dialog

The main Offline Content Manager window shows a list of all files and folders currently in your offline cache, grouped by content server, along with a number of buttons that can be used to perform some content management tasks on the items in the offline content list.

Figure A–34 Offline Content Manager



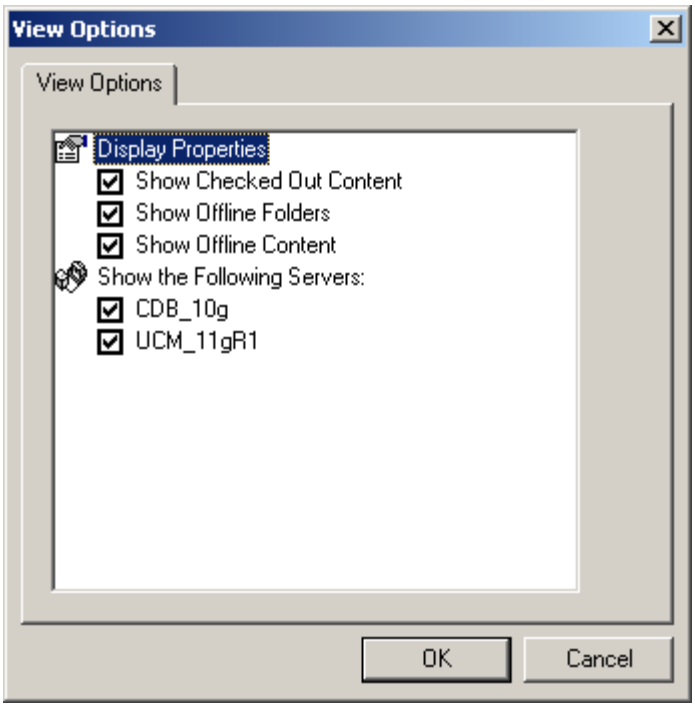
Element	Description
List of offline content	This list shows all files and folders that are currently in your offline cache, grouped by content server, along with their location and status. You can right-click any of the items in the list to see relevant content management tasks (which can also be performed using the buttons to the right of the list). See "Performing Content Management Tasks on Offline Content" on page B-3. Files in the offline content list show their content management status as overlays on their application icons. See "Content File Status" on page 8-9 for more information.
Close	Click this button to exit the Offline Content Manager.
Filter...	Click this button to open the View Options dialog, where you can filter the offline content list to show only particular servers or items. See "View Options Dialog" on page A-60 for more information.

Element	Description
Check Status	Click this button to check the current status of the selected folder or file. Desktop Integration Suite verifies that the item still exists on the content server. If so, it compares the content management status of the locally cached copy with that of the item on the content server and reports any discrepancies. For example, it notifies you if a file was checked out of the content server by someone or if your locally cached copy is no longer the latest revision. (You can then use **Refresh** to get the latest revision.) If an item no longer exists on the content server, you will be given the opportunity to remove it from the offline content list.
View	Click this button to open the selected content file in its associated application in read-only mode. See "Viewing Content Files" on page 8-16 for more information.
Refresh	Click this button to refresh the selected offline folder or file. If you refresh an offline file, the offline copy in your local cache is updated to the latest released version 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. See "Making Folders and Files Available Offline" on page 8-42.
Remove	Click this button to remove the selected item from the offline cache on your computer. Use this option with care, as you may be removing files that have not yet been checked in to the content server.
Check In	Click this button to check the selected file in to the content server associated with the file. Depending on the server configuration, you may be prompted for your login credentials or provide metadata prior to check-in.
Properties...	Click this button to show the properties dialog for the selected folder or file. See "Offline Folder Properties Dialog" on page A-61 or "Offline Content Item Properties Dialog" on page A-62 for more information.

A.27 View Options Dialog

The View Options dialog enables you to filter the offline content list to show only certain types of offline content or content from certain servers.

Figure A–35 View Options Dialog

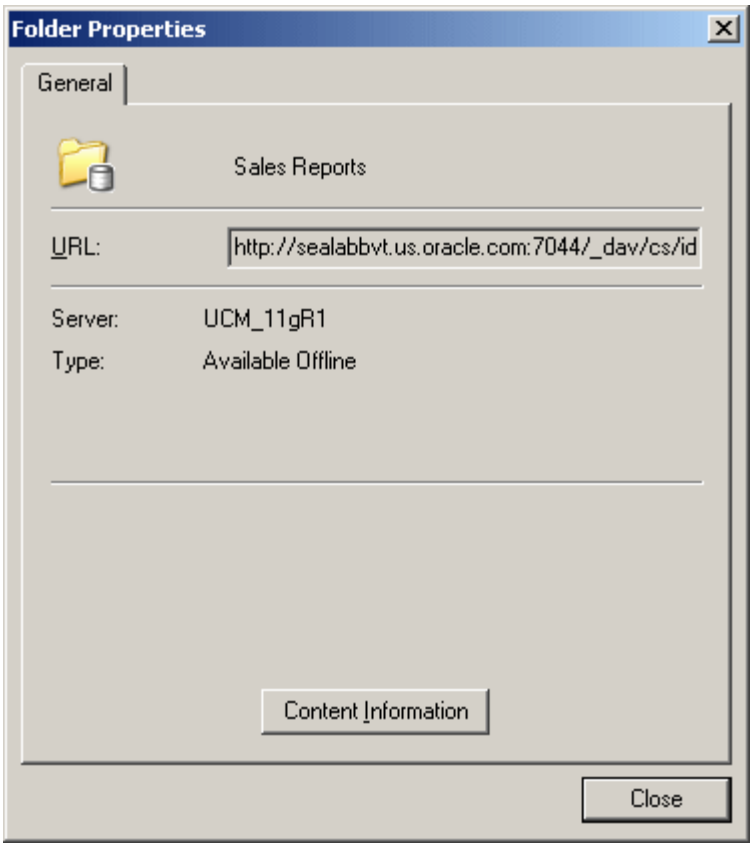


Element	Description
Show Checked Out Content	Select this check box to show all offline content that you have checked out of the content server.
Show Offline Folders	Select this check box to show all content folders marked to be available offline in the list. All files in the folder are also displayed. See "Making Folders and Files Available Offline" on page 8-42 for more information.
Show Offline Content	Select this check box to show all content files marked to be available offline in the list. See "Making Folders and Files Available Offline" on page 8-42 for more information.
Show the Following Servers	This option enables you to show or hide offline content folders and files on specific content servers. All defined server connections are listed, and you can select or clear server check boxes to show or hide their offline content.
OK	Click this button to close this dialog and make the current view options take effect.
Cancel	Click this button to close this dialog and cancel any changes that you made.

A.28 Offline Folder Properties Dialog

The Folder Properties dialog shows a number of properties of an offline content folder. It resembles the standard folder properties dialog in Windows, but includes some additional elements specific to offline content folders. You cannot modify any of the information in this dialog.

Figure A–36 Folder Properties Dialog For Offline Content Folders

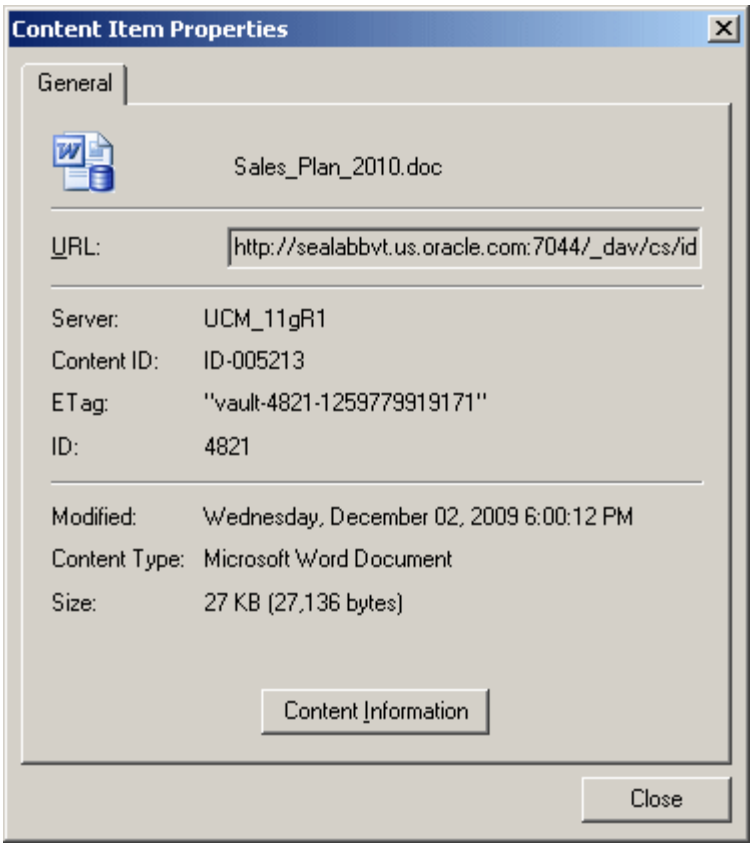


Element	Description
Folder name	This is the name of the offline folder as stored on the content server and displayed in the integration hierarchy.
URL	This is the full WebDAV URL of the offline content folder.
Server	This is the name of the server that the content folder resides on, as shown in the integration hierarchy.
Type	This shows the type of content folder (typically, "Available Offline").
Content Information	This button is displayed for servers of type 'UCM Content Server' only (that is, Oracle Content Server instances). Click this button to open the Hierarchical Folder Information page, which shows a number of content management properties of the offline content folder. See "Hierarchical Folder Information Page" on page A-14 for further information.
Close	Click this button to close this dialog.

A.29 Offline Content Item Properties Dialog

The Content Item Properties dialog shows a number of properties of an offline content file. It resembles the standard file properties dialog in Windows, but includes some additional elements specific to offline content files. You cannot modify any of the information in this dialog.

Figure A–37 Content Item Properties Dialog For Offline Content Files



Element	Description
File name	This is the name of the offline file as stored on the content server and displayed in the integration hierarchy.
URL	This is the full WebDAV URL of the offline content file.
Server	This is the name of the server that the content file resides on, as shown in the integration hierarchy.
Content ID	This is a unique identifier of the offline content file on the content server.
ETag	This is the entity tag of the offline content file, which is an HTTP response header that is used by the WebDAV protocol to to determine changes to files.
ID	This is a unique identifier of the current revision of the offline content file on Oracle Content Server.
Modified	This is the date and time that the offline content file was last modified.
Content Type	This is the content type of the offline content file (for example, 'Microsoft Word Document').
Size	This is the file size of the offline content file.
Content Information	This button is displayed for servers of type 'UCM Content Server' only (that is, Oracle Content Server instances). Click this button to open the standard content information page for the offline file, as retrieved from the content server.

Element	Description
Close	Click this button to close this dialog.

B

Using the Offline Content Manager

This section covers these topics:

- "About the Offline Content Manager" on page B-1
- "Launching the Offline Content Manager" on page B-2
- "Filtering the List of Offline Content" on page B-2
- "Performing Content Management Tasks on Offline Content" on page B-3

B.1 About the Offline Content Manager

You will generally work with offline content using the normal integration features provided by Desktop Integration Suite (see "Working With Offline Content Folders and Files" on page 8-41). The Offline Content Manager is a special utility that provides an interface to all integration folders and files that are stored in the offline cache on your local computer. This cache is used as a temporary storage location for items managed by a 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), and
- newly created files in Microsoft Office applications that were not checked in successfully (for example, because no server connection could be established).

Cache Location

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\Stellent\SyndicationCache

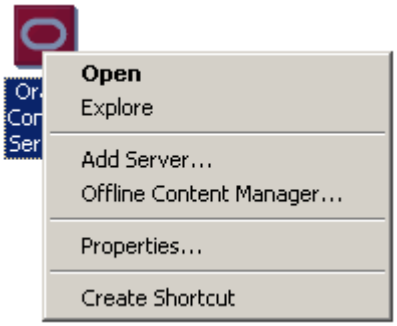
where *USER* is the profile name of the current computer user (for example, jsmith). The 'SyndicationCache' directory stores all offline files associated with Desktop Integration Suite in separate subdirectories for each content server.

Note: You can change the offline cache location on your computer if the defaults do not meet your organization's file storage requirements. See "Changing the Location of the Local File Cache" on page C-4 for more information.

B.2 Launching the Offline Content Manager

You launch the Offline Content Manager by right-clicking **Oracle Content Servers** in the integration hierarchy or on your desktop while simultaneously holding the Shift and Ctrl keys on your keyboard. The context menu then includes an option called **Offline Content Manager...**. Choose this option to launch the Offline Content Manager (see "Offline Content Manager Dialog" on page A-59).

Figure B–1 Expanded Context Menu of Oracle Content Server Icon on Desktop



B.3 Filtering the List of Offline Content

If you have many offline folders and files, you may want to limit what is shown in the list of offline content. You can filter the list to show only certain types of offline content or content from particular servers. You can choose to display any combination of the following:

- **Checked-out content:** You may choose to show or hide all content files that you have currently checked out of the content server.
- **Offline content folders:** You may choose to show or hide all content folders that you have marked to be available offline. This means that you can view these folders and the files in them (in read-only mode), even if you are not connected to the content server. See "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Offline content files:** You may choose to show or hide all content files that you have marked to be available offline. This means that you can view these files (in read-only mode), even if you are not connected to the content server. See "Working With Offline Content Folders and Files" on page 8-41 for more information.
- **Content from certain servers:** You may choose to show or hide offline folders and files from one or more specific content servers.

Perform these steps to choose what to display in the list of offline content:

1. From the Offline Content Manager, click **Filter...**.

   The View Options dialog is displayed (see "View Options Dialog" on page A-60).

2. Select or clear the check boxes of the items you want to show or hide in the offline content list.
3. Click **OK**.

B.4 Performing Content Management Tasks on Offline Content

You can perform a number of content management tasks for the items in the offline content list. After selecting the item, you can use the buttons in the main Offline Content Manager window (see "Offline Content Manager Dialog" on page A-59) or you can right-click and use the context menu.

> **Note:** You can also perform any of the tasks below directly in the integration hierarchy in Windows Explorer or your e-mail application (Microsoft Outlook or Lotus Notes). See "Working With Offline Content Folders and Files" on page 8-41 for more information.

Checking the Status of Offline Content

To check the current status of a selected item, click the **Check Status** button. When you check the status of an item, Desktop Integration Suite verifies that the item still exists on the content server. If so, it compares the content management status of the locally cached copy with that of the item on the content server and reports any discrepancies. For example, it notifies you if a file was checked out of the content server by someone or if your locally cached copy is no longer the latest revision. (You can then use **Refresh** to get the latest revision.)

If an item no longer exists on the content server, you will be given the opportunity to remove it from the offline content list.

Viewing Offline Content

To open the selected item in its associated application in read-only mode, click the **View** button or right-click and choose **View** in the context menu. See "Viewing Content Files" on page 8-16 for more information.

Refreshing Offline Content

To refresh the selected item, click the **Refresh** button or right-click and choose **Refresh Offline Content**.

If you refresh an offline file, the offline copy in your local cache is updated to the latest released revision 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. See "Making Folders and Files Available Offline" on page 8-42.

Removing Offline Content

To remove the selected item from the offline cache on your computer, click the **Remove** button or right-click and choose **Remove Offline Content** in the context menu. Use this option with care, as you may be removing files that have not yet been checked in to the content server.

Checking In Offline Content

To check the selected file in to the content server, click the **Check In** button or right-click and choose **Check in** in the context menu. Depending on the server configuration, you may be prompted for your login credentials or provide metadata prior to check-in.

Viewing Properties of Offline Content

To view the properties of the selected offline folder or file, click the **Properties...** button or right-click and choose **Properties...** in the context menu.

C

Advanced Configuration

This section covers these topics:

- "Setting Advanced Windows Explorer Integration Options" on page C-1
- "Configuring Form-Based Login" on page C-3
- "Changing the Location of the Local File Cache" on page C-4
- "Showing or Hiding Productivity Nodes in the Integration Hierarchy" on page C-5
- "Configuring the Title and File Name of Checked-in E-mails" on page C-6

Important: This section deals with advanced configuration. End users typically do not need to perform these actions. Make sure that you consult with your system administrator before doing any of the tasks in this section.

C.1 Setting Advanced Windows Explorer Integration Options

Desktop Integration Suite offers a number of advanced configuration options that enable you to fine-tune the way Windows Explorer integration works on your computer. To see the options dialog, right-click the **Oracle Content Servers** icon on your desktop while simultaneously holding the Shift and Ctrl keys. The context menu then includes an option called **Properties...** (Figure C–1). Choose this option to open the Windows Explorer Integration Properties dialog (Figure C–2).

Figure C–1 Expanded Context Menu of Oracle Content Server Icon on Desktop

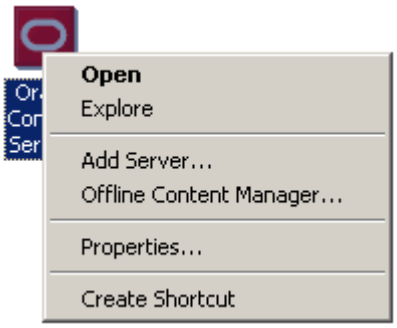
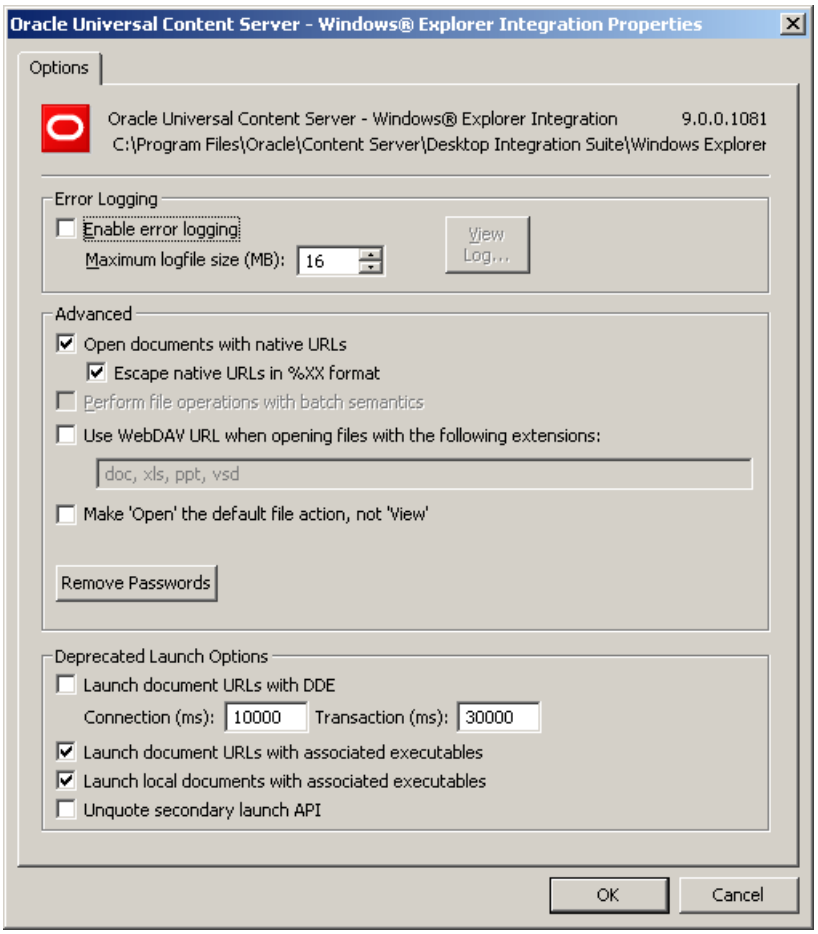


Figure C–2 Windows Explorer Integration Properties Dialog



Important: Do not modify any of these settings unless specifically instructed to do so, for example by a support engineer. Changing these settings may break your Desktop Integration Suite client installation!

Element	Description
Enable error 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 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 logfile size (MB)	Specify the maximum file size that the 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.
View Log...	Click this button to view the current log file.
Open documents with native URLs	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.

Element	Description
Escape native URLs in %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 ! # $ & ' ( ) + - . ; = _.
Perform file operations with batch semantics	Select this check box to attempt to check in files and directories in batches instead of individually. This does not use the WEBDAV spec.
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 to be opened rather than viewed when you select it in Windows Explorer and press Enter or double-click it. See "Content Management Actions on Files" on page 8-8 for a comparison of these two actions.
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.)
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.

C.2 Configuring Form-Based Login

Your organization may use separate identity and access management software that provides secure, form-based login screens to authenticate users and control what they have access to on the network. Desktop Integration Suite is compatible with form-based logins. To set this up, system administrators need to add a comment to the login page so that Desktop Integration Suite identifies an HTML response as the forms-based login page. Users, as a result, will see the form-based login instead of the standard content server login.

Perform these steps to configure form-based login:

1. Locate the login form on the file system (for example, login.fcc for Netegrity SiteMinder). The location of this form depends on how the authentication system was set up in your organization.
2. Open the form in a text editor.
3. Add the following comment (with no spaces) to the HEAD section of the form:

```
<!--IdcClientLoginForm=1-->
```

> **Important:** The form's HEAD section may contain a lot of code; for example, many META tags or JavaScript code. The delivered page must have that HTML comment (or token) in the first 5,000 characters of the response, otherwise the server connection may fail. The software on the client computer sniffs the response for the `<!--IdcClientLoginForm=1-->` token (using a strict string search) and route through the prompting code if it is found. It is encoded as an HTML comment so that regular browsers do not show the token when they attempt to log in. (If it is Idoc Script, then the parser removes that bit of code from the delivered page, and the client-side browser will not see anything in the page.)

4. Save and close the form.

The next time users connect to a content server using Desktop Integration Suite, they will see a login form, where they can provide their username and password to log on.

C.3 Changing the Location of the Local File Cache

Desktop Integration Suite uses temporary storage cache on the file system of client computers. See "Local Caching of Content Files" on page 8-7 for more information. 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\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 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\Universal Content Management\Desktop
Integration Suite\WebDAV]
"Syndication Dir"="H:\\Application Data\\SyndicationCache"
```

Please note the following:

- These registry values are not included by default; you need to add them manually.
- The registry values are string values.
- 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. See Appendix B, "Using the Offline Content Manager."
- 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 these registry keys 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.

C.4 Showing or Hiding Productivity Nodes in the Integration Hierarchy

When you connect to an Oracle Content Server 11*g* instance, the server tree in the integration hierarchy will include a number of productivity nodes:

- My Checked-Out Content
- My Saved Queries
- My Workflow Assignments

See "Oracle Content Server Repositories" on page 6-4 for more information on these nodes.

You can use the following registry keys to hide one or more of these productivity nodes in the integration hierarchy:

> **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\Universal Content Management\Desktop
Integration Suite\WebDAV\DisabledProductivityNodes]
"MyCheckedOutContent"=dword:00000001
"MyWorkflowAssignments"=dword:00000001
"MySavedQueries"=dword:00000001
```

Please note the following:

- These registry values are not included by default; you need to add them manually.
- The registry values are dword values.
- Setting the value to '0' shows the productivity node (which is also the default).

- Make sure that you restart your computer (or log off and log back on) after modifying these settings.
- Setting these registry keys affects the productivity nodes of *all* defined server connections. You cannot change the node display settings 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.

C.5 Configuring the Title and File Name of Checked-in E-mails

Oracle Content Server administrators can use configuration variables on the server to specify what the title and file name of checked-in e-mail messages will be.

Configuration Variables

There are four configuration variables that control the title and file name of checked-in e-mail messages:

- **EmailMetadataAlwaysSetTitle:** With this variable set to 'true', the title will always be the subject line of the e-mail message. If it is set to 'false', then the title will be the e-mail message ID (for received messages, as retrieved from the header) or UUID (for drafts or sent messages), unless it is changed to the subject line based on the EmailMetadataSetTitleIfMessageId variable below. The default is 'false'.
- **EmailMetadataSetTitleIfMessageId:** With this variable set to 'true', if the title is identical to the file name (without file extension), then the title will be set to the subject line. If it is set to 'false,' then the title will not be changed. The default is 'true'.
- **EmailMetadataAlwaysRenameFile:** With this variable set to 'true', the file name will always be the subject line of the e-mail message. If it is set to 'false', then the file name will be the e-mail message ID (for received messages, as retrieved from the header) or UUID (for drafts or sent messages), unless it is changed to the subject line based on the EmailMetadataRenameFileIfMessageId variable below. The default is 'false'.
- **EmailMetadataRenameFileIfMessageId:** With this variable set to 'true', if the title is identical to the file name (without file extension), then the file name will be set to the subject line. If it is set to 'false,' then the file name will not be changed. The default is 'true'.

> **Note:** If the subject line is empty, then the title or file name will revert to their original value (that is, the value it had before the change).

Setting the Configuration Variables

Perform these steps to configure the title or file name of checked-in e-mail messages:

1. Log in to Oracle Content Server as a system administrator.
2. Open the **Administration** tray or menu, and click **Admin Server**.

   The Content Admin Server page is displayed.
3. Click **General Configuration** on the left.
4. In the **Additional Configuration Variables** section, add the following lines as needed:

```
EmailMetadataAlwaysSetTitle=true|false
EmailMetadataSetTitleIfMessageId=true|false
EmailMetadataAlwaysRenameFile=true|false
EmailMetadataRenameFileIfMessageId=true|false
```

5. Click **Save**.
6. Restart the content server.

Examples

Here are some usage examples:

- Both the title and file name should always be the subject line (which is the default situation):

```
EmailMetadataAlwaysSetTitle=false
EmailMetadataSetTitleIfMessageId=true
EmailMetadataAlwaysRenameFile=false
EmailMetadataRenameFileIfMessageId=true
```

> **Note:** You could also use the following variable settings to accomplish this:
>
> ```
> EmailMetadataAlwaysSetTitle=true
> EmailMetadataAlwaysRenameFile=true
> ```
>
> However, this may change the title and file name in situations where this may not be desirable. For example, if you copy an e-mail to your desktop and then use Windows Explorer to drag and drop the file into an Oracle Content Server contribution folder with metadata prompting, you may change the title in the check-in form from the subject line to something else. In that case, the automatic renaming should not take place.

- Both the title and file name should always be the message ID or UUID:

```
EmailMetadataAlwaysSetTitle=false
EmailMetadataSetTitleIfMessageId=false
EmailMetadataAlwaysRenameFile=false
EmailMetadataRenameFileIfMessageId=false
```

- The title should always be the subject line and file name should always be the message ID or UUID:

```
EmailMetadataAlwaysSetTitle=false
EmailMetadataSetTitleIfMessageId=true
EmailMetadataAlwaysRenameFile=false
EmailMetadataRenameFileIfMessageId=false
```

D

Uninstalling Desktop Integration Suite

This section covers these topics:

- "Uninstalling Desktop Integration Suite Completely" on page D-1
- "Uninstalling Individual Components" on page D-2

D.1 Uninstalling Desktop Integration Suite Completely

Perform these steps to completely uninstall the Desktop Integration Suite client software:

> **Note:** Make sure that you hide the Oracle Content Servers hierarchy in Lotus Notes prior to uninstalling the Desktop Integration Suite software (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8). If you do not, you will continue to see the Oracle Content Servers hierarchy in your e-mail application and clicking it will result in an error message.

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 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 Desktop Integration Suite uninstall wizard is launched.
5. Click **Yes** when asked if you are sure that you want to remove the Desktop Integration Suite software from your computer.

   The software is removed from the client computer.

Important: If you are running the WebDAV Client, you must uninstall it using the WebDAV Client uninstaller.

Note: If you reinstall the Desktop Integration Suite software (for example, during an upgrade), any server connections that you set up earlier will continue to be available after reinstalling the software.

D.2 Uninstalling Individual Components

Perform these steps to uninstall individual Desktop Integration Suite components:

Note: Make sure that you hide the Oracle Content Servers hierarchy in Lotus Notes prior to uninstalling the Desktop Integration Suite software (see "Showing or Hiding the Oracle Content Servers Hierarchy" on page 5-8). If you do not, you will continue to see the Oracle Content Servers hierarchy in your e-mail application and clicking it will result in an error message.

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 Content Server - Desktop Integration Suite**.
4. Click **Change** to start the Desktop Integration Suite install wizard.
5. Go through the installation procedure (see "Installing the Latest Version of Desktop Integration Suite" on page 2-3) and unselect the application(s) that you no longer want to integrate with Content Server.

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