

Oracle® Fusion Middleware

Using Oracle WebCenter Content: Desktop

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

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Preface

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

Audience

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

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

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

Conventions

The following text conventions are used in this document:

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

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

This section covers these topics:

- [Section 1.1, "About Oracle WebCenter Content: Desktop"](#)
- [Section 1.2, "What's New"](#)
- [Section 1.3, "Supported Content Repositories"](#)
- [Section 1.4, "Supported Client Applications"](#)
- [Section 1.5, "Localized User Interface"](#)
- [Section 1.6, "Accessibility Features"](#)

1.1 About Oracle WebCenter Content: Desktop

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

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

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

1.2 What's New

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

- [What's New in Oracle WebCenter Content: Desktop 11g Release 1 \(11.1.1.7\)](#)
- [What's New in Oracle WebCenter Content: Desktop 11g Release 1 \(11.1.1.6\)](#)

- [What's New in Desktop Integration Suite 11g Release 1 \(11.1.1.4\)](#)
- [What's New in Desktop Integration Suite 11g Release 1 \(11.1.1.3\)](#)

1.2.1 What's New in Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7)

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

Lotus Notes Client Support

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

Update Metadata Context Menu Item

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.7) allows you to update folder and content metadata using the Update Metadata context menu item on folders and content items (assuming that you have sufficient privileges to change the metadata). This is additional to the current ability to edit metadata in the preview pane or in the Content Information dialog.

Creating New E-mails that Include Links to a File

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

Enhancements for Users of Oracle Content Database

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

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

1.2.2 What's New in Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6)

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

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

Rebranding to Oracle WebCenter Content: Desktop

Oracle Enterprise Content Management Suite (Oracle ECM) is now part of the Oracle WebCenter product stack to provide the most complete, open, and unified enterprise

content management platform. The desktop integration software and documentation have been rebranded accordingly.

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

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) offers integration of Oracle WebCenter Content Server's Quick Search feature into Windows Explorer, which allows you to quickly search for content on an Oracle WebCenter Content Server instance. For more information, see [Section 3.9, "Quick Search Integration"](#) and [Section 10.3, "Searching for Content Files."](#)

Oracle WebCenter Content Search Engine Plug-in for Web Browsers

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) provides search engine plug-ins for Internet Explorer, Mozilla Firefox, and Google Chrome, which allow you to perform quick searches on an Oracle WebCenter Content Server instance directly from the web browser search bar without having to go through the content server's web interface. For more information, see [Chapter 6, "Integration into Web Browsers."](#)

Improvements in Windows 7 and Windows Vista Explorer Integrations

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

New Integration Hierarchy Structure

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) introduces a new integration hierarchy structure for Oracle WebCenter Content Server instances, which more closely resembles the web interface than previous releases. The top-level nodes now include My Content Server, New Check-In, and Browse Content. See [Section 8.4, "Oracle WebCenter Content Server Repositories."](#)

New Check-in Profiles Node

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

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

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) improves the way you can view and copy files that are checked out or available offline. In previous releases, it would always be the server copy of a file that was viewed or copied even if a locally cached version was available (for example, a managed Office document that was edited, but not yet checked back in to the server). In this release, the context menu of managed files in Windows Explorer provides explicit options to open or view the local or server file: **View/Copy File From Server** vs. **View/Copy** (from local cache). See [Section 10.8, "Viewing Content Files"](#) and [Section 10.14, "Copying Content Folders and Files."](#)

Offline Files Node

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) adds an Offline Files node to an offline content server in the integration hierarchy, which lists all files on that server that are offline, including those that are not in a content folder. Users can

interact with these files directly from the list. See [Section 14, "Working with Offline Content."](#)

Improved Search Performance

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

Support for Framework Folders

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

Propagating Selected Metadata Fields

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to propagate selected metadata fields and values to underlying folders and files on Oracle WebCenter Content Server instances running Framework Folders. In earlier releases, you could only propagate all metadata fields and you had no control over the field values. See [Section 10.17, "Propagating Folder Metadata."](#)

Information Bar in Microsoft Office Applications

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) introduces an information bar for managed documents in Microsoft Office application which provides content management details about the document. See [Section 11.2, "Opening and Viewing an Existing Managed Document."](#)

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

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

Checking Out Local Copies of Managed Documents in Microsoft Office Applications

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to check out local copies of managed documents from within Microsoft Office applications. This saves you from having to close the document and reopen it in full edit mode. See [Section 11.4, "Checking Out a Managed Document in View Mode."](#)

Turning Managed Office Documents into Unmanaged Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to 'unmanage' managed documents in Microsoft Office applications; that is, remove the document properties that associate it with a particular content server. This effectively turns the document into a brand-new, unsaved document that you cannot check back in to the server as a new revision of the original document. See [Section 11.10, "Turning a Managed Document into an Unmanaged Document."](#)

Opening a Different Revision of a Managed Office Document

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) makes it easier to open a different revision of a managed Office document than the one that is currently open in the Microsoft Office application. This may be useful if you opened a document that may have newer revisions on the server. See [Section 11.5, "Opening a Different Revision of a Managed Document."](#)

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

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to refresh the current managed document in a Microsoft Office application to show the latest revision from the content server. This may be useful if you opened a document that may have newer revisions on the server. See [Section 11.6, "Refreshing a Managed Document."](#)

Inserting Items into Office Documents Using the Context-Sensitive Menu

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to insert managed content or links to managed content using the context-sensitive (right-click) menu in Microsoft Office applications. You can also still use the WebCenter Content menu or ribbon. For more information, see [Section 11.11, "Inserting Managed Content into Office Documents."](#)

Inserting Multiple Items into Office Documents

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to select multiple content items on an Oracle WebCenter Content Server instance at the same time and insert their contents or links to them into Microsoft Office documents. For more information, see [Section 11.11, "Inserting Managed Content into Office Documents."](#)

The ability to add comments has also been added to the special close dialog. See [Section 4.4, "Close Dialog."](#)

Adding Comments to Office Documents Upon Check-in

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to add comments to Office documents when checking them in from Microsoft Office applications. For more information, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)

Simple Closing of Managed Office Documents

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

Undoing the Check-Out of Unchanged, Managed Office Documents

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

Attaching Multiple Content Items to E-mail Messages

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

Showing Only Published Content on Oracle WebCenter Content

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to show only content on Oracle WebCenter Content in the integration hierarchy that has been released. This hides content items that are currently in a workflow, are being converted

or indexed, or have a future release date. For more information, see [Section 10.18, "Showing or Hiding Unpublished Content Files."](#)

Open With... Option

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to open files that are checked out or available offline with different applications than their associated applications based on the file extensions. For more information, see [Section 10.9, "Opening Content Files."](#)

Query Folders

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows current search results and saved queries to be dragged-and-dropped or copied-and-pasted anywhere in the content folders tree to become dynamic query folders. These will always contain the content items on a server that meet the specified criteria, allowing you to create virtual groupings of content. For more information, see [Section 10.4, "Working with Saved Search Queries and Query Folders."](#)

Personal Folders

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) supports personal folders, which provide quick and convenient access to content items on an Oracle WebCenter Content Server instance. For more information, see [Section 10.20, "Working with Your Personal Folders."](#)

Changing Folder Locations of Content Items

Oracle WebCenter Content: Desktop 11g Release 1 (11.1.1.6) allows you to associate content items with a folder by dragging and dropping them into the target folder, even if they were not associated with any content folder before. You can drag and drop items not only from a content folder, but also from search results lists, query folders, and My Content Server nodes. For more information, see [Section 10.15, "Moving Content Folders and Files."](#)

E-mail Metadata Mapping

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

Component Configuration pages on Oracle WebCenter Content Server

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

Improved User Assistance

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

1.2.3 What's New in Desktop Integration Suite 11g Release 1 (11.1.1.4)

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

Support of 64-bit Microsoft Windows 7

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

Native 64-bit Integration with Microsoft Windows

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

Integration with Microsoft Office 2010

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

Most Recently Used (MRU) List in Microsoft Office Applications

Desktop Integration Suite 11g Release 1 (11.1.1.4) offers most recently used (MRU) lists in Microsoft Office applications, which enable users to quickly reopen content items on Oracle WebCenter Content Server they worked on before. For more information, see [Section 4.5, "Most-Recently-Used \(MRU\) List."](#)

Check Out Option for Read-Only Documents

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

Overriding the Default Profile Selection During Check-ins

By default, Desktop Integration Suite 11g Release 1 (11.1.1.4) allows users to change the default content profile when prompted for metadata in the Check In Content dialog (see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#)). (The previous release would not allow changing the default content profile.) This behavior can be controlled using a Windows Registry switch.

1.2.4 What's New in Desktop Integration Suite 11g Release 1 (11.1.1.3)

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

Note: Some of the new features may not be available on all servers, depending on their server type, software version, and system configuration. See [Section 7.3, "Content Server Capabilities"](#) for further details.

Integration with Oracle Content Server 11gR1

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

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

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

Integration with Oracle Content Database Servers

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

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

Improved Integration with Other WebDAV Servers

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

Integration with Microsoft Windows 7

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

Integration with 64-bit Microsoft Windows XP and Vista

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

No more ODMA for Microsoft Office Integration

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

Oracle Content Server Profiles

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

Oracle Content Server Productivity Nodes

Desktop Integration Suite 11g Release 1 (11.1.1.3) supports the Oracle Content Server productivity nodes, which means that My Workflow Assignments, My Checked-Out Content, and My Saved Queries are displayed as special server folders under Oracle Content Servers in Windows Explorer and supported 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 11gR1 instance, not earlier versions. For more information, see [Chapter 8, "Understanding the Integration Hierarchy."](#)

Metadata Prompts for New Files in Contribution Folders

Desktop Integration Suite 11g Release 1 (11.1.1.3) may prompt for metadata when you drag and drop, copy and paste, or save new files to a contribution folder on an Oracle Content Server instance, if that feature has been enabled for that folder or if required metadata is missing. Please note that this feature is available only if you are connecting to an Oracle Content Server 11gR1 instance, not earlier versions. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)

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

Desktop Integration Suite 11g Release 1 (11.1.1.3) enables you to insert links to files, content of files, and images on an Oracle Content Server instance into supported Microsoft Office documents (Word, Excel, and PowerPoint). For more information, see [Section 11.11, "Inserting Managed Content into Office Documents."](#)

User Interface for Comparing Word Documents on Content Server

Desktop Integration Suite 11g Release 1 (11.1.1.3) provides a user interface in Microsoft Word (menu items and selection dialog) that enables you to compare Word documents managed on an Oracle Content Server instance. You can compare a document with an earlier revision of the same document or with a different file on the content server. For more information, see [Section 11.12, "Comparing Managed Microsoft Word Documents."](#)

Expanded Localization

The client software for Desktop Integration Suite 11g Release 1 (11.1.1.3) has been localized into more languages than previous releases (see [Section 1.5, "Localized User Interface"](#)).

Improved User Assistance

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

1.3 Supported Content Repositories

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

- [Oracle WebCenter Content Server and Oracle Content Server](#)
- [Oracle Content Database](#)
- [Other Content Repositories That Support the Standard WebDAV Protocol](#)

Oracle WebCenter Content Server and Oracle Content Server

Oracle WebCenter Content: Desktop 11gR1 can connect to Oracle WebCenter Content Server and Oracle Content Server repositories. For the latest information on the

supported server configurations, see the Oracle Fusion Middleware Supported System Configurations page at:

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

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

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

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

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

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

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

Integration with Oracle WebCenter Content Server provides the broadest content management capabilities directly in the supported desktop applications. Please note that not all features of Desktop 11gR1 may be available if you are connecting to a pre-11g Oracle Content Server instance. See [Section 7.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for Oracle WebCenter Content Server instances.

Oracle Content Database

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

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

Integration with Oracle Content Database provides basic content management capabilities directly in the supported desktop applications. See [Section 7.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for Oracle Content Database instances.

Other Content Repositories That Support the Standard WebDAV Protocol

Integration with WebDAV servers provides basic content management capabilities directly in the supported desktop applications. Please note that the WebDAV DeltaV extension is not supported. See [Section 7.3, "Content Server Capabilities"](#) for details on the integrated content management capabilities offered for WebDAV servers.

Note: See [Chapter 7, "Working with Content Server Connections"](#) for more information on connecting to content servers.

1.4 Supported Client Applications

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

Windows Explorer

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

Desktop Applications

- Microsoft Word 2002 (XP) through 2010

- Microsoft PowerPoint 2002 (XP) through 2010
- Microsoft Excel 2002 (XP) through 2010

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 2010
- Lotus Notes Email Client 6.5.2, 7.x, and 8 (through 8.5.3), with Lotus Domino mail databases based on release 6, 7, or 8 mail templates (although release 8 mail templates will not show the Oracle Content Servers node in the folders pane)

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

Web Browsers (for the Search Engine Plug-in)

- Microsoft Internet Explorer 7.0 or higher
- Mozilla Firefox 3.5 or higher
- Google Chrome 10 or higher

For more information on setting up client computers for use with Desktop, see [Chapter 2, "Setting Up the Desktop Client Software on Your Computer."](#)

1.5 Localized User Interface

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

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

1.6 Accessibility Features

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

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

Menu Access

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

Context Menus

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

Standard Windows Keyboard Shortcuts

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

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

Additional Keyboard Shortcuts

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

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

Setting Up the Desktop Client Software on Your Computer

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

- [Section 2.1, "Installation Requirements"](#)
- [Section 2.2, "Installation Considerations"](#)
- [Section 2.3, "Installation Process"](#)
- [Section 2.4, "Uninstalling a Previous Version of the Desktop Client Software"](#)
- [Section 2.5, "Installing the Latest Version of the Desktop Client Software"](#)
- [Section 2.6, "Manually Configuring the Notes.ini File"](#)
- [Section 2.7, "Setting Up Content Server Connections"](#)

2.1 Installation Requirements

Client computers running Oracle WebCenter Content: Desktop 11gR1 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 or 64-bit version)
- 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 website:

<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:

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

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

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

- The Desktop client software can communicate with Oracle WebCenter Content Server 11gR1 as well as Oracle Content Server 11gR1 and 10gR3. Other Content Server versions are not supported. Please note that not all features of Desktop 11gR1 may be available if you are connecting to an Oracle Content Server version prior to 11gR1 (see [Section 1.2, "What's New"](#)).
- The Desktop client software can communicate with Oracle Content Database (Oracle Content DB) 10gR1 (10.2).
- There are separate installers for the 32-bit and 64-bit versions of Desktop 11gR1 (in \Installer\32-bit or \Installer\64-bit of the distribution zip file). Make sure that you run the correct installer version for your Microsoft Windows environment: the 32-bit installer for 32-bit Windows and the 64-bit installer for 64-bit Windows. Ask your system administrator if you are not sure which one to use.

Note: If you are using 64-bit Microsoft Windows with 32-bit Microsoft Office, then use the 64-bit Desktop installer.

- The Desktop client software must be installed using administrator-level permissions. If you do not have these permissions and you attempt to install the software, the registry settings will not be set up correctly and the software will not function properly. If you need assistance, contact your system administrator.
- There are also msi-based installers, which can help system administrators roll out Desktop 11gR1 on client computers more efficiently. For more information, see *Managing Oracle WebCenter Content*.

2.3 Installation Process

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

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

2.4 Uninstalling a Previous Version of the Desktop Client Software

If a previous version of the Desktop 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.

To completely uninstall the desktop integration client software:

1. Open Windows Control Panel.
2. Click the following link, depending on your operating system:
 - Windows XP: **Add or Remove Programs**

- Windows Vista and Windows 7 (category view): **Uninstall a program** (under Programs)
 - Windows Vista and Windows 7 (icon view): **Programs and Features**
3. Select **Oracle WebCenter Content: Desktop** or **Oracle Content Server - Desktop Integration Suite**.
 4. Do the following, depending on your operating system:
 - Windows XP: Click **Remove**.
 - Windows Vista and Windows 7: Right-click and choose **Uninstall**.

The uninstall wizard is launched.
 5. Click **Yes** when asked if you are sure that you want to remove the Desktop client software from your computer.

The software is removed from the client computer.
 6. Restart your computer.

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

2.5 Installing the Latest Version of the Desktop Client Software

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

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

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

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

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

Please note there are separate 32-bit and 64-bit Desktop client software installers: \Installer\32-bit\DIS-11.1.x.yyy-Setup.exe and \Installer\64-bit\DIS-11.1.x.yyy-x64-Setup.exe, where x is the version number and yyy the build number. Make sure that you run the correct installer version for your Microsoft Windows environment: the 32-bit installer for 32-bit Windows and the 64-bit installer for 64-bit Windows. Ask your system administrator if you are not sure which one to use.

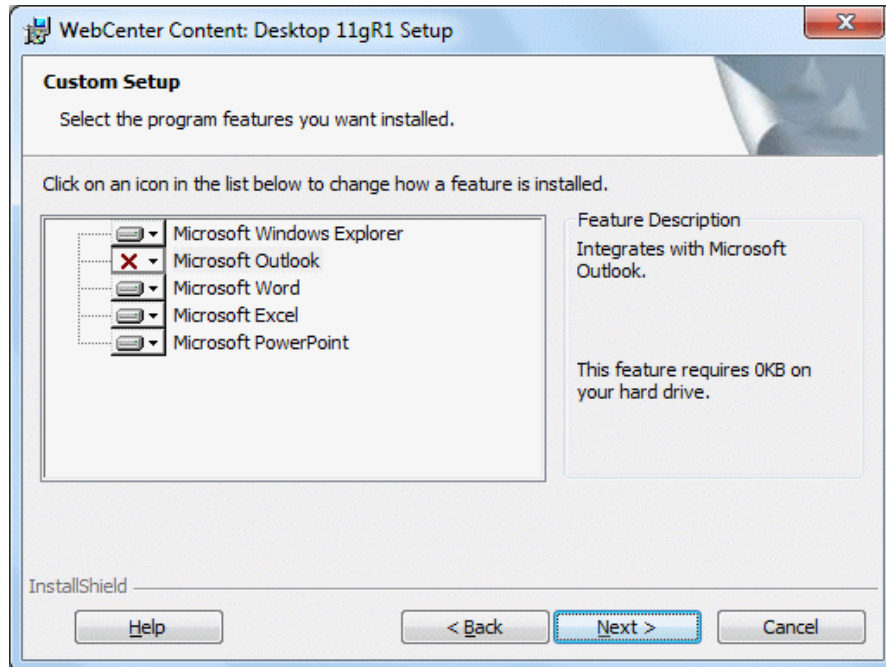
Note: If you are using 64-bit Microsoft Windows with 32-bit Microsoft Office, then use the 64-bit Desktop installer.

2. After obtaining the client software, run the installer executable (.exe, not .msi).
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**.

4. On the Welcome screen, click **Next** to start the installation.
5. In the Custom Setup dialog, select the supported applications you want to integrate with content servers.

The list includes all supported applications that were detected on your local computer (see [Section 1.4, "Supported Client Applications"](#)). All applications are selected for integration by default. If you do not want to integrate an application with content servers, click its icon and choose "This feature will not be available" from the menu. The icon associated with the application then changes to a red X.

Figure 2–1 Selection of Applications to Integrate with Content Server



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

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 a content server are currently running, a warning may be displayed stating that some Desktop features will not be available until the affected applications are restarted. Click **Next** to continue.
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 [Section 2.6, "Manually Configuring the Notes.ini File."](#)

8. After the installation has been completed, click **Finish** to exit the installation wizard.
9. Restart your computer.

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 client software installer attempts to make these changes automatically. If the installer is unable to do this, an error message is displayed, and you must make the changes manually.

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

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

Please note the following for Windows Vista and Windows 7:

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

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

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

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

```
AddInMenus=STELNI . DLL
```

(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 client software on your computer, you must set up connections to all content servers that you want to access from your computer. For more information, see [Chapter 7, "Working with Content Server Connections."](#)

Integration into Windows Explorer

This section covers these topics:

- [Section 3.1, "About Windows Explorer Integration"](#)
- [Section 3.2, "Accessing Desktop Integration in Windows Explorer"](#)
- [Section 3.3, "Desktop Integration Features in Windows Explorer on Windows 7 and Vista"](#)
- [Section 3.4, "Desktop Integration Features in Windows Explorer on Windows XP"](#)
- [Section 3.5, "WebCenter Content Servers Hierarchy in Navigation Pane"](#)
- [Section 3.6, "Content Pane"](#)
- [Section 3.7, "Preview Pane"](#)
- [Section 3.8, "Details Pane"](#)
- [Section 3.9, "Quick Search Integration"](#)
- [Section 3.10, "Favorites List"](#)
- [Section 3.11, "Buttons in Standard Buttons Toolbar"](#)
- [Section 3.12, "Content Pane View Modes"](#)
- [Section 3.13, "Showing or Hiding Panes"](#)
- [Section 3.14, "Modifying the Column Settings in the Content Pane"](#)

3.1 About Windows Explorer Integration

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

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

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

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 **WebCenter Content Servers** icon on your Windows desktop (Figure 3–1).

Figure 3–1 *WebCenter Content Server Icon on Windows Desktop*



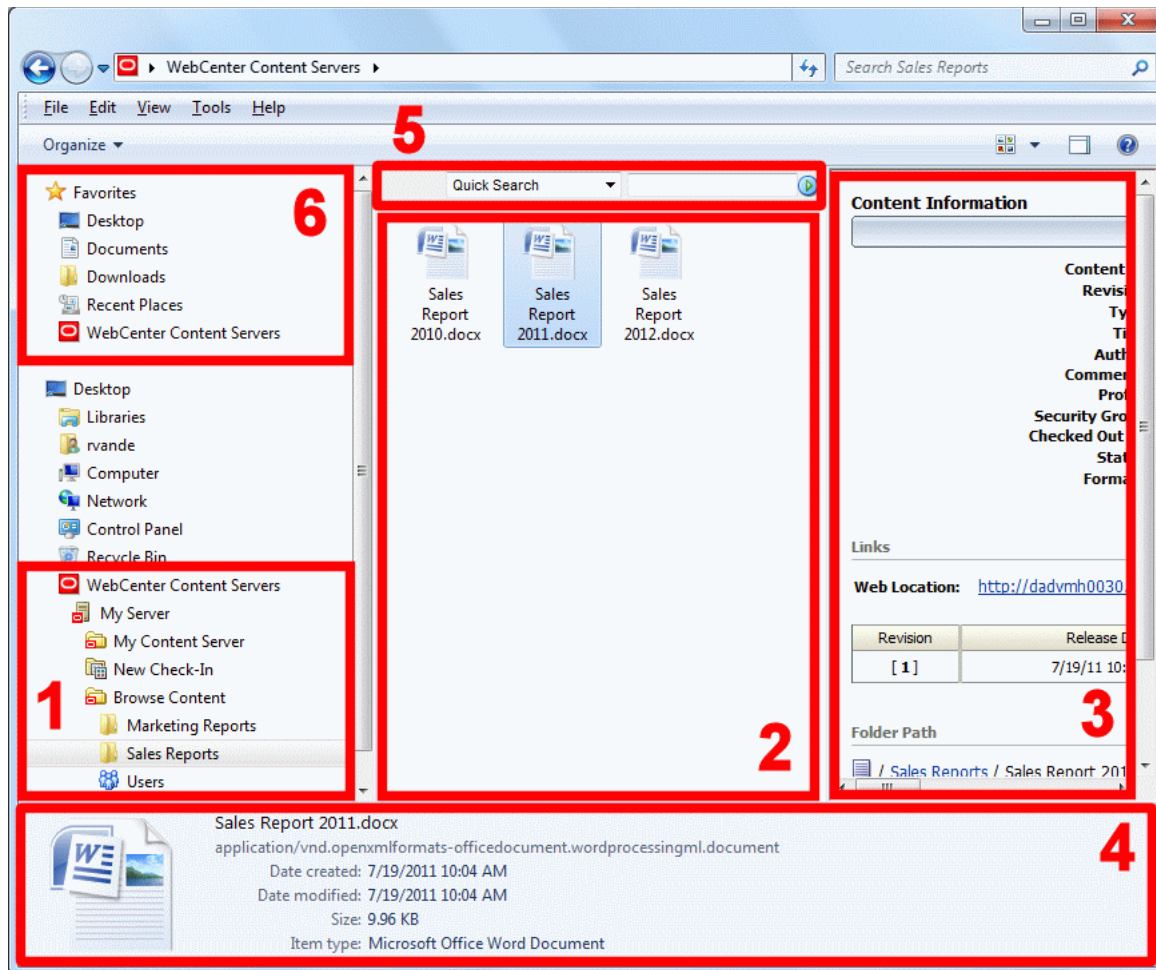
- Navigate to the top-level **WebCenter Content Servers** node in the Windows Explorer folders list. For more information, see [Section 3.5, "WebCenter Content Servers Hierarchy in Navigation Pane."](#)
- Select the top-level **WebCenter Content Servers** node in the Favorites list in the navigation pane (Windows 7), or from the **Favorites** menu (Windows XP). In Windows 7, this node should already be included in the Favorites list. To add the node (or content folders) manually, see [Section 3.10, "Favorites List."](#)
- Double-click a shortcut to a particular content server, content folder, or content item.

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

After you install the Desktop client software on your computer running Microsoft Windows 7 or Vista, it integrates into Windows Explorer in several ways. As shown in [Figure 3–2](#), Desktop offers content management features in Windows Explorer in different areas:

1. [WebCenter Content Servers Hierarchy in Navigation Pane](#) (see [Section 3.5](#) on page 3-4)
2. [Content Pane](#) (see [Section 3.6](#) on page 3-5)
3. [Preview Pane](#) (see [Section 3.7](#) on page 3-5)
4. [Details Pane](#) (see [Section 3.8](#) on page 3-6)
5. [Quick Search Integration](#) (see [Section 3.9](#) on page 3-6)
6. [Favorites List](#) (see [Section 3.10](#) on page 3-6)

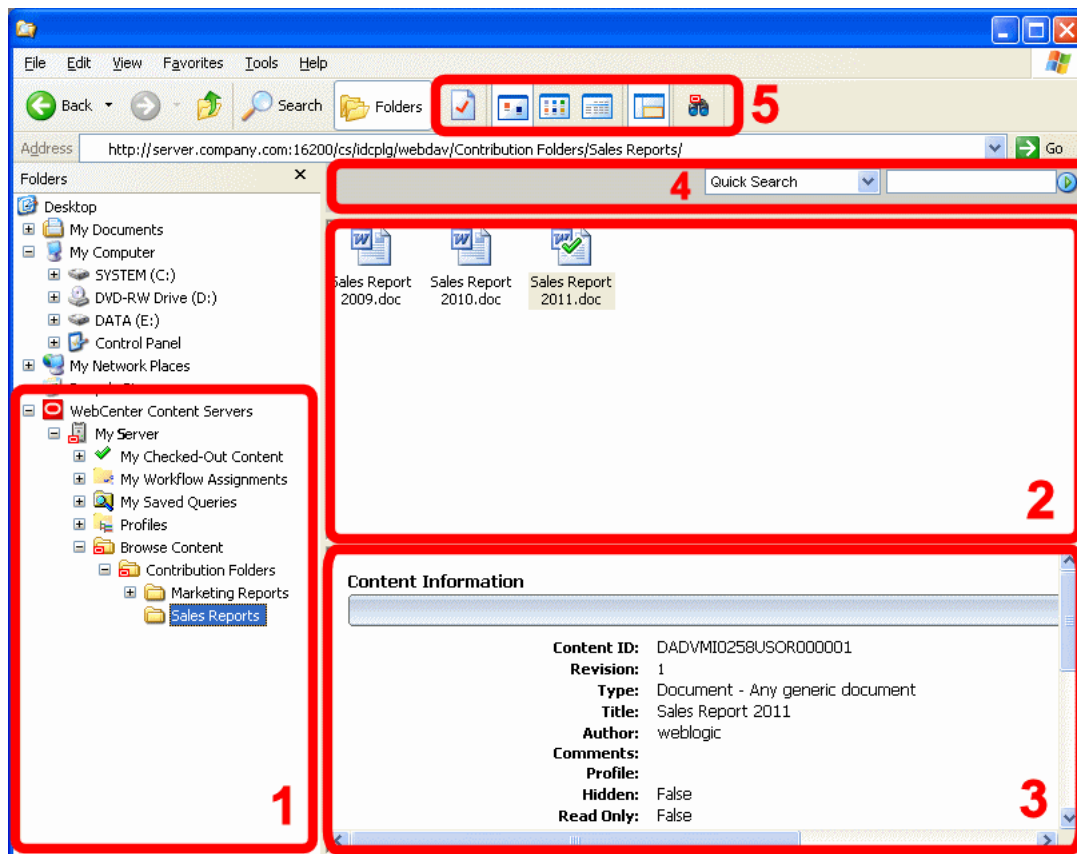
Figure 3-2 Desktop Integration Features in Windows Explorer on Windows 7



3.4 Desktop Integration Features in Windows Explorer on Windows XP

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

1. [WebCenter Content Servers Hierarchy in Navigation Pane](#) (see [Section 3.5](#) on page 3-4)
2. [Content Pane](#) (see [Section 3.6](#) on page 3-5)
3. [Preview Pane](#) (see [Section 3.7](#) on page 3-5)
4. [Quick Search Integration](#) (see [Section 3.9](#) on page 3-6)
5. [Buttons in Standard Buttons Toolbar](#) (see [Section 3.11](#) on page 3-7)

Figure 3–3 Desktop Integration Features in Windows Explorer on Windows XP

3.5 WebCenter Content Servers Hierarchy in Navigation Pane

The Desktop client software adds a hierarchical folder structure called **WebCenter Content Servers** to the navigation pane in Windows Explorer (Figure 3–2). For more information on this integration hierarchy in Windows Explorer, see [Chapter 8, "Understanding the Integration Hierarchy."](#)

You work with content managed on a content server in much the same way you do with other folders and files on your computer. You can copy files, drag and drop files into folders, right-click objects to open context menus, and so on. However, some tasks typically performed on files or folders on your local computer may have a different effect when performed on files and folders managed by a content server. For example, copying a new file to a content folder does not put it on your local computer, but rather uploads and saves it on the content server. In addition, the context menus of files may include items specific to content management, such as Check In, Check Out, Copy Links, and so on. For more information, see [Chapter 10, "Working with Managed Content Files in Windows Explorer."](#)

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

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

3.6 Content Pane

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

When you select an object in the WebCenter Content Servers hierarchy in the navigation pane, the contents of that object are displayed on the right, in the content pane. It may, for example, show a list of all files in the current content folder. Unpublished content items on an Oracle WebCenter Content Server instance are shown in a different color, typically green (see [Section 10.18, "Showing or Hiding Unpublished Content Files"](#)).

Content Management Status Icon

Managed content files listed in the content pane may have a symbol in their file icon to indicate their content management status. For example, if the file is currently checked out by yourself, this is visualized using a green check mark, as shown in [Figure 3-4](#). For a full explanation of all content management status icons, see [Section 9.7, "Content File Status."](#)

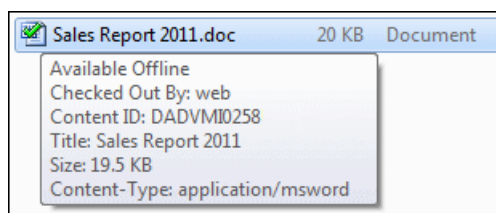
Figure 3-4 Status Icon Overlaid on Top of Microsoft Word Application Icon



Content Management Tooltip

If you hover your mouse cursor over a managed file in the content pane, a screen tip is displayed providing content management information about that file, as shown in [Figure 3-5](#).

Figure 3-5 Screen Tip Showing Content Management Information About File



3.7 Preview Pane

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

If you do not see the preview pane, you can enable it (see [Section 3.13.2, "Showing or Hiding the Preview Pane"](#)).

3.8 Details Pane

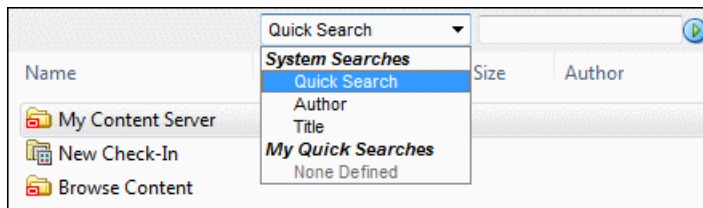
When you select an object in the Oracle Content Server hierarchy in the navigation pane on Windows 7, you may see a details pane, which provides more technical details about the selected object (for example, the MIME type, modification date, and size of a file on the content server).

If you do not see the details pane, you can enable it (see [Section 3.13.3, "Showing or Hiding the Details Pane"](#)).

3.9 Quick Search Integration

The Desktop client software adds Oracle WebCenter Content Server's Quick Search feature to Windows Explorer, which enables you to quickly search for content on an Oracle WebCenter Content Server instance. The Quick Search feature is shown above the content pane ([Figure 3–6](#)) when you are anywhere within a server's integration tree. If you do not see it, right-click in an unused area of the content pane (that is, away from any of the items listed in it) and choose **Show Quick Search**. Please note that Quick Search visibility is controlled for each server in the integration hierarchy separately.

Figure 3–6 Quick Search Integration in Windows Explorer on Windows 7



The Quick Search integration in Windows Explorer exactly mimics the Quick Search feature in Oracle WebCenter Content Server's web browser interface. The search results are displayed in the content pane. For more information about this feature, see [Section 10.3, "Searching for Content Files"](#) and also *Using Oracle WebCenter Content*.

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

3.10 Favorites List

In Windows 7, the Desktop client software adds the top-level **WebCenter Content Servers** node to the favorites list of Windows Explorer. This enables you to quickly open the integration hierarchy in the content pane. As described below, you can also add your own favorite content folders to the list for easy access.

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

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

- Select the node or folder in the content pane, then drag it to the **Favorites** node in the navigation pane.

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







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

3.11 Buttons in Standard Buttons Toolbar

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

Figure 3–7 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. For more information, see Section A.3, "Server Properties Dialog," Section A.7, "Folder Properties Dialog," and Section A.17, "Content Item Properties Dialog."
	Click this button to display the items in the content pane in icons view. For more information, see Section 3.12, "Content Pane View Modes."
	Click this button to display the items in the content pane in list view. For more information, see Section 3.12, "Content Pane View Modes."
	Click this button to display the items in the content pane in details view. For more information, see Section 3.12, "Content Pane View Modes."
	Click this button to show or hide the Desktop preview pane. For more information, see Section 3.7, "Preview Pane."
	<p>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. For more information, see Section A.18, "Content Query Capture Dialog."</p> <p>Please note that this button is available only for Oracle WebCenter Content Server instances, not for other WebDAV servers (including Oracle Content DB).</p> <p>You can also search a content server by right-clicking it anywhere in its integration tree node and choosing Search....</p>

3.12 Content Pane View Modes

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

Desktop supports all view modes offered by the operating system. If a view includes applications icons, then these will include overlaid symbols to indicate the content management status of the object. See [Section 9.7, "Content File Status"](#) for further details.

3.13 Showing or Hiding Panes

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

- [Section 3.13.1, "Showing or Hiding the Navigation Pane"](#)
- [Section 3.13.2, "Showing or Hiding the Preview Pane"](#)
- [Section 3.13.3, "Showing or Hiding the Details Pane"](#)

3.13.1 Showing or Hiding the Navigation Pane

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

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

3.13.2 Showing or Hiding the Preview Pane

If you select an item in the WebCenter Content Servers hierarchy in the mail folders tree, the preview pane in your e-mail application shows information about the selected item (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 for that server.

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

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

3.13.3 Showing or Hiding the Details Pane

The details pane in Windows 7 shows more technical details about the selected item in the content pane (for example, the MIME type, modification date, and size of a file on the content server).

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

3.14 Modifying the Column Settings in the Content Pane

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

To change the column display settings:

1. Log in to the content server for which you want to change the content display.
2. Set the content pane view mode to details view. For more information, see [Section 3.12, "Content Pane View Modes."](#)
3. Right-click any of the column headings in the content pane.
 - **Windows 7 and Windows Vista:** Choose **More...** to open the Choose Details dialog.
 - **Windows XP:** Choose **Column Settings...** to open the Column Settings dialog (see [Section A.6, "Column Settings \(or Choose Details\) Dialog"](#)).
4. Make changes to the column display, order, and width settings as desired.
5. Click **OK** when you are done. (The changes take effect immediately and they apply to the entire content server.)

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

Integration into Microsoft Office Applications

This section covers these topics:

- [Section 4.1, "About Microsoft Office Integration"](#)
- [Section 4.2, "Integration into Microsoft Office XP \(2002\) and 2003"](#)
- [Section 4.3, "Integration into Microsoft Office 2007 and 2010"](#)
- [Section 4.4, "Close Dialog"](#)
- [Section 4.5, "Most-Recently-Used \(MRU\) List"](#)
- [Section 4.6, "Microsoft Office Document Properties"](#)

4.1 About Microsoft Office Integration

After installing the Desktop client software on your computer, you can interact with content servers and the files on them directly from a number of Microsoft Office applications. You can perform a number of content management tasks, including opening files from a content server ("check out"), saving file to a server ("check in"), searching for files on a server, comparing document revisions on a server, and inserting files on a server or links to these files into the current document.

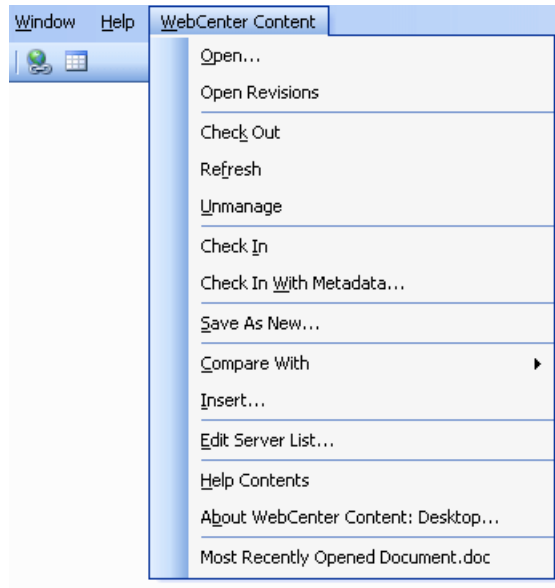
Note: Not all these features may be available in all Office applications and for all content servers (depending on their server type and version).

The following Microsoft Office applications are supported:

- Microsoft Word 2002 (XP) through 2010
- Microsoft PowerPoint 2002 (XP) through 2010
- Microsoft Excel 2002 (XP) through 2010

4.2 Integration into Microsoft Office XP (2002) and 2003

The Desktop client software adds a menu called **WebCenter Content** to the main Microsoft Office XP (2002) and 2003 application menu bars.

Figure 4–1 WebCenter Content menu in Microsoft Word 2003

The WebCenter Content menu contains the following menu items:

- **Open...:** This option opens a dialog where you can locate a file on a content server and open it in the current Office application. The file is checked out of the content server. For more information, see [Section 11.2, "Opening and Viewing an Existing Managed Document."](#)
- **Open Revisions:** This option opens a dialog where you can choose a particular revision of the managed file to be opened in the current Office application. For more information, see [Section 11.5, "Opening a Different Revision of a Managed Document."](#)
- **Check Out:** This option checks the currently open read-only Office document out of the content server, so you can make changes and check it back in to the server as a new revision when you are done. For more information, see [Section 11.4, "Checking Out a Managed Document in View Mode."](#)
- **Refresh:** This option updates the currently open managed Office document to the latest revision on Oracle WebCenter Content Server. For more information, see [Section 11.6, "Refreshing a Managed Document."](#)
- **Unmanage:** This option removes the managed status of the current Office document and turns it into an unmanaged document, which means you can no longer check it in to the content server as a revision of the existing document. For more information, see [Section 11.10, "Turning a Managed Document into an Unmanaged Document."](#)
- **Check In:** This option checks the current Office document back in to the content server as a new revision using its existing metadata. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)
- **Check In With Metadata...:** This option opens a dialog where you can modify the metadata of the current Office document before checking it in to the content server as a new revision. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)

- **Save As New...:** This option opens a dialog where you can check the current Office document in to a content server as a new content item. For more information, see [Section 11.7, "Creating and Checking In a New Managed Document."](#)
- **Compare With:** This option is available only in Microsoft Word. It enables you to compare the current Word document with another document:
 - **Revision:** This option enables you to compare the current Word document with a different revision of the same document on the content server. If you choose this option, a dialog is opened where you can select the document revision that you want to compare the current Word document with. (This option is available only if the current Word document is a managed content item.)
 - **Content Item:** This option enables you to compare the current Word document with a different document on the content server. If you choose this option, a dialog is opened where you can locate a file on the content server to compare to the document currently open in Microsoft Word.

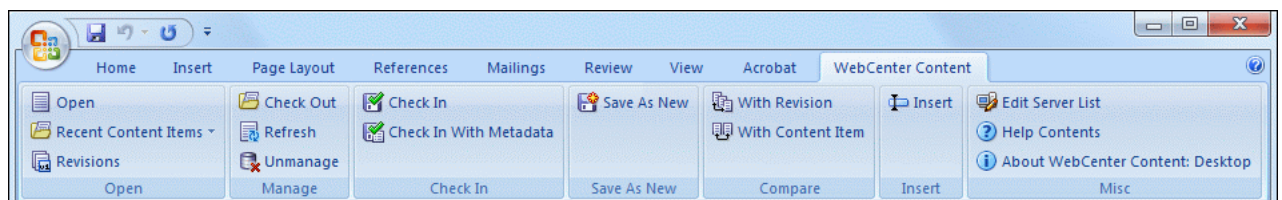
For more information on the document comparison feature, see [Section 11.12, "Comparing Managed Microsoft Word Documents."](#)

- **Insert...:** This option opens a dialog where you can select a file on a content server for insertion into the current Microsoft Word, Excel, or PowerPoint document (at the current cursor position). You can insert a hyperlink to a file on the server, the contents of a file, or an image. For more information, see [Section 11.11, "Inserting Managed Content into Office Documents."](#)
- **Edit Server List...:** This option opens a dialog where you can add, view, and delete server connections. For more information, see [Chapter 7, "Working with Content Server Connections."](#)
- **Help Contents:** This option launches the Desktop online help in your standard web browser.
- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.
- **Most recently used (MRU) list:** This lists a number of content items on Oracle WebCenter Content Server instances that were most recently opened in the Microsoft Office application. You can conveniently reopen a document by selecting it in the list. For more information, see [Section 11.3, "Reopening a Recently Opened Managed Document."](#)

4.3 Integration into Microsoft Office 2007 and 2010

The Desktop client software adds a ribbon called **WebCenter Content** to the Microsoft Office 2007 and 2010 application interfaces.

Figure 4–2 *WebCenter Content Ribbon in Microsoft Word 2007*



The WebCenter Content ribbon includes the following groups:

- **Open:** This ribbon group contains the following option:
 - **Open:** This option opens a dialog where you can locate a file on a content server and open it in the current Office application. The file is checked out of the content server. For more information, see [Section 11.2, "Opening and Viewing an Existing Managed Document."](#)
 - **Recent Content Items:** This option opens a menu that lists a number of content items on Oracle WebCenter Content Server instances that were most recently opened in the Microsoft Office application. You can conveniently reopen a document by selecting it in the list. For more information, see [Section 11.3, "Reopening a Recently Opened Managed Document."](#)
 - **Revisions:** This option opens a dialog where you can choose a particular revision of the managed file to be opened in the current Office application. For more information, see [Section 11.5, "Opening a Different Revision of a Managed Document."](#)
- **Manage:** This ribbon group contains the following options:
 - **Check Out:** This option checks the currently open read-only Office document out of the content server, so you can make changes and check it back in to the server as a new revision when you are done. For more information, see [Section 11.4, "Checking Out a Managed Document in View Mode."](#)
 - **Refresh:** This option updates the currently open managed Office document to the latest revision on Oracle WebCenter Content Server. For more information, see [Section 11.6, "Refreshing a Managed Document."](#)
 - **Unmanage:** This option removes the managed status of the current Office document and turns it into an unmanaged document, which means you can no longer check it in to the content server as a revision of the existing document. For more information, see [Section 11.10, "Turning a Managed Document into an Unmanaged Document."](#)
- **Check In:** This ribbon group contains the following options:
 - **Check In:** This option checks the current Office document back in to the content server as a new revision using its existing metadata. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)
 - **Check In With Metadata:** This option opens a dialog where you can modify the metadata of the current Office document before checking it in to the content server as a new revision. (This option is available only if the current document is already managed by a content server.) For more information, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)
- **Save As New:** This ribbon group contains the following option:
 - **Save As New:** This option opens a dialog where you can check the current Office document in to a content server as a new content item. For more information, see [Section 11.7, "Creating and Checking In a New Managed Document."](#)
- **Compare:** This ribbon group is available only in Microsoft Word. It contains the following options:
 - **With Revision:** This option enables you to compare the current Word document with a different revision of the same document on the content

server. If you choose this option, a dialog is opened where you can select the document revision that you want to compare the current Word document with. (This option is available only if the current Word document is a managed content item.)

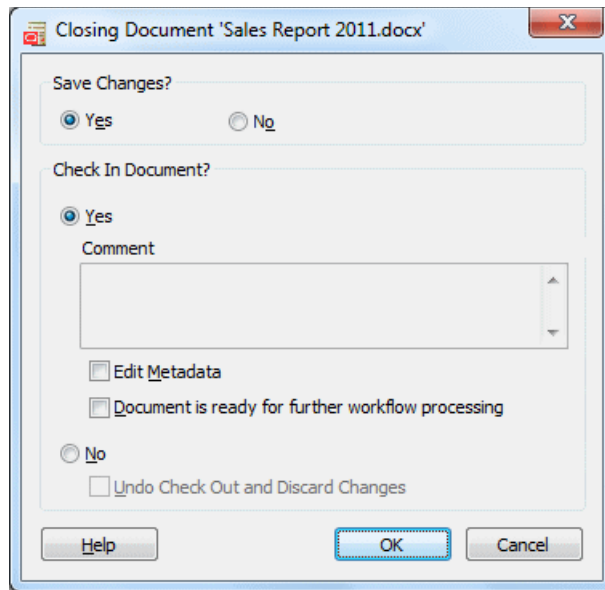
- **With Content Item:** This option enables you to compare the current Word document with a different document on the content server. If you choose this option, a dialog is opened where you can locate a file on the content server to compare to the document currently open in Microsoft Word.

For more information on the document comparison feature, see [Section 11.12, "Comparing Managed Microsoft Word Documents."](#)

- **Insert:** This ribbon group contains the following option:
 - **Insert:** This option opens a dialog where you can select one or more files on an Oracle WebCenter Content Server instance for insertion into the current Microsoft Word, Excel, or PowerPoint document (at the current cursor position). You can insert hyperlinks to files on a server, the contents of files, or images. For more information, see [Section 11.11, "Inserting Managed Content into Office Documents."](#)
- **Misc:** This ribbon group contains the following options:
 - **Edit Server List:** This option opens a dialog where you can add, view, and delete server connections. For more information, see [Chapter 7, "Working with Content Server Connections."](#)
 - **Help Contents:** This option launches the Desktop online help in your standard web browser.
 - **About WebCenter Content: Desktop:** This option opens a dialog that provides version information about the Desktop client software.

4.4 Close Dialog

By default, when you have a checked-out document open in your Microsoft Office application and you close that document or the application, a special close dialog for managed documents opens ([Figure 4-3](#)).

Figure 4–3 Integration Close Dialog in Microsoft Office Application

This special close dialog enables you to decide what to do with the current checked-out document: you can save the changes (if there are any unsaved changes), check the document back in to the server as a new revision, add a comment, edit the document metadata before checking it in, not check it in and save it locally as an offline file, or cancel the checked-out status of the document. For more information, see [Section 11.8.2, "Checking In a Managed Document When Closing It."](#)

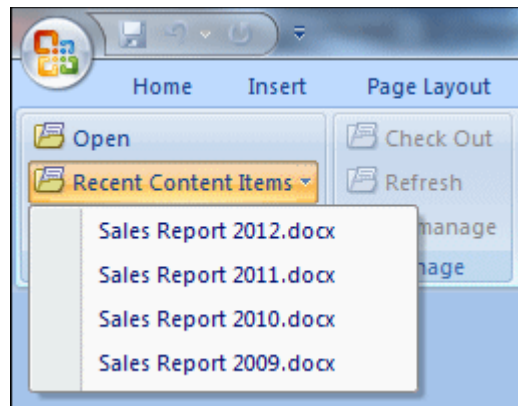
Note: Optionally, you can configure Desktop to close managed documents in much the same way as unmanaged documents ("Do you want to save the changes?"), so you will not see this special dialog. See [Section B.1, "Setting Windows Explorer Integration Options"](#) ('Hide the Close Document check-in dialog' option).

4.5 Most-Recently-Used (MRU) List

Microsoft Office applications provide a most recently used (MRU) list of content items on Oracle WebCenter Content Server instances that were opened in the application before. This enables you to quickly and conveniently reopen content items you worked on earlier.

Note: The most-recently-used list only includes content items that reside on Oracle WebCenter Content Server or Oracle Content Server instances, not on Oracle Content Database servers or other WebDAV servers.

In Office XP (2002) and 2003, the list is located at the bottom of the WebCenter Content menu. In Office 2007 and 2010, it is in the **Recent Content Items** dropdown menu in the WebCenter Content ribbon ([Figure 4–4](#)).

Figure 4-4 Most-Recently-Used (MRU) List in Microsoft Word 2007

The most recently opened file is at the top of the list. If you hover the mouse cursor over a list item in Office 2007 or 2010, you see the content ID of the file as well as the server it resides on. Tooltips are not provided in Office XP (2002) and 2003.

To reopen a recent content item, simply select it from the list, and it opens in the Office application. If the document was last opened in read-only mode ('view'), you are asked whether you want to open it in read-only mode again or if you want it opened in full edit mode ('open'). See [Section 9.6, "Content Management Actions on Files"](#) for a comparison between viewing and opening a file.

Changing the Maximum Number of MRU List Items

You can change the maximum number of items shown in the most recently used list:

- **Microsoft Office XP (2002) and 2003:** Click **Tools**, then **Options**, open the **General** tab, and then set the maximum number of entries in the **Recently used file list** option. Make sure the check box for this option is selected.
- **Microsoft Office 2007:** Click the Office button in the top left corner, then choose **Word/Excel/PowerPoint Options**, then **Advanced**, and then set the maximum number of entries in the **Show this number of Recent Documents** option.
- **Microsoft Office 2010:** Open the **File** panel, then choose **Options**, then **Advanced**, and then set the maximum number of entries in the **Show this number of Recent Documents** option.

The new setting takes effect as soon as you close the options dialog, but the number of items shown on the list will not change until a new document is added to it.

4.6 Microsoft Office Document Properties

A number of custom properties may be added to Microsoft Office files, depending on the content server type and configuration (specifically, the DesktopTag feature on Oracle WebCenter Content Server). By default, these new custom properties include:

- **DISdDocName:** This is the content ID of the document on the content server. Every content item on the server has its own content ID, which uniquely identifies that item on the server. (Please note that each checked-in document revision has an additional, internal ID as a unique reference to that specific revision; see DISdID below.)
- **DISProperties:** This is a list of all Desktop properties that are added to Microsoft Office documents.

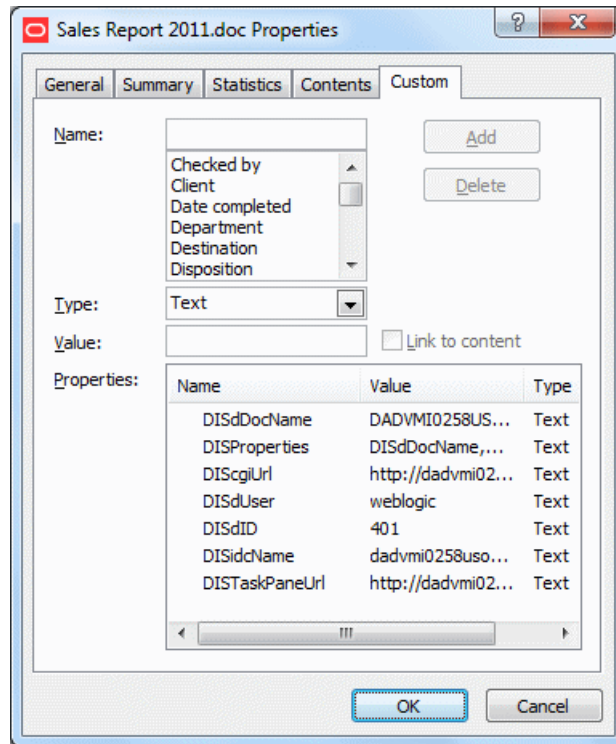
- **DIScgiUrl:** This is the CGI URL of the content server that the document resides on. It essentially enables Office applications (or other third-party software) to "remember" what content server the Office document came from when it was opened in the application, and where it was stored on the server.
- **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).

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

Viewing the Custom Properties

You can view the custom properties of a Microsoft Office file as follows:

- **Microsoft Office XP (2002) and 2003:** Choose **File**, then **Properties**, and then open the **Custom** tab.
- **Microsoft Office 2007:** Click the Office button in the top left corner, then choose **Prepare**, then **Properties**, then **Document Properties**, then **Advanced Properties**, and then open the **Custom** tab.
- **Microsoft Office 2010:** Open the **File** panel, then click **Info**, then **Properties**, then **Advanced Properties**, and then open the **Custom** tab.

Figure 4–5 Custom Document Properties (Microsoft Word 2007)

These custom document properties allow Desktop to keep track of the location of a managed Office document on a content server as well as its revision history. This enables users to open the most recent revision of a managed document even if they have an older revision, or to check a document back in to a content server even outside a content management integration context. This may be useful in a number of situations, for example:

- You received a managed Office document from someone else, for example as an attachment to an e-mail.
- You received a managed Office document that may not be the most recent revision.
- You copied a managed Word document from a server in the integration hierarchy on your computer to a folder outside that hierarchy.

In any of these cases, you can open the latest revision of the document in Microsoft Word on your computer, make changes, and then check it back in to the server using the WebCenter Content menu or ribbon in Word. Desktop looks at the custom properties embedded in the Word document to find out where to upload the file to.

Integration into E-mail Clients

This section covers these topics:

- [Section 5.1, "About E-mail Client Integration"](#)
- [Section 5.2, "Integration into Microsoft Outlook"](#)
- [Section 5.3, "Integration into Lotus Notes"](#)
- [Section 5.4, "Content Pane and Preview Pane"](#)
- [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)
- [Section 5.7, "Modifying the Column Settings in the Content Pane"](#)

5.1 About E-mail Client Integration

After installing the Desktop client software on your computer, you can check in e-mail messages and their attachments 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 WebCenter 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.

For more information on managing e-mail on content servers, see [Chapter 12, "Working with Managed E-mail."](#)

5.2 Integration into Microsoft Outlook

The Desktop client software can work with Microsoft Outlook 2002 (XP) through 2010. After installing the integration software, you can interact with content servers and the files on them directly from Microsoft Outlook.

Desktop adds various integration features to Microsoft Outlook:

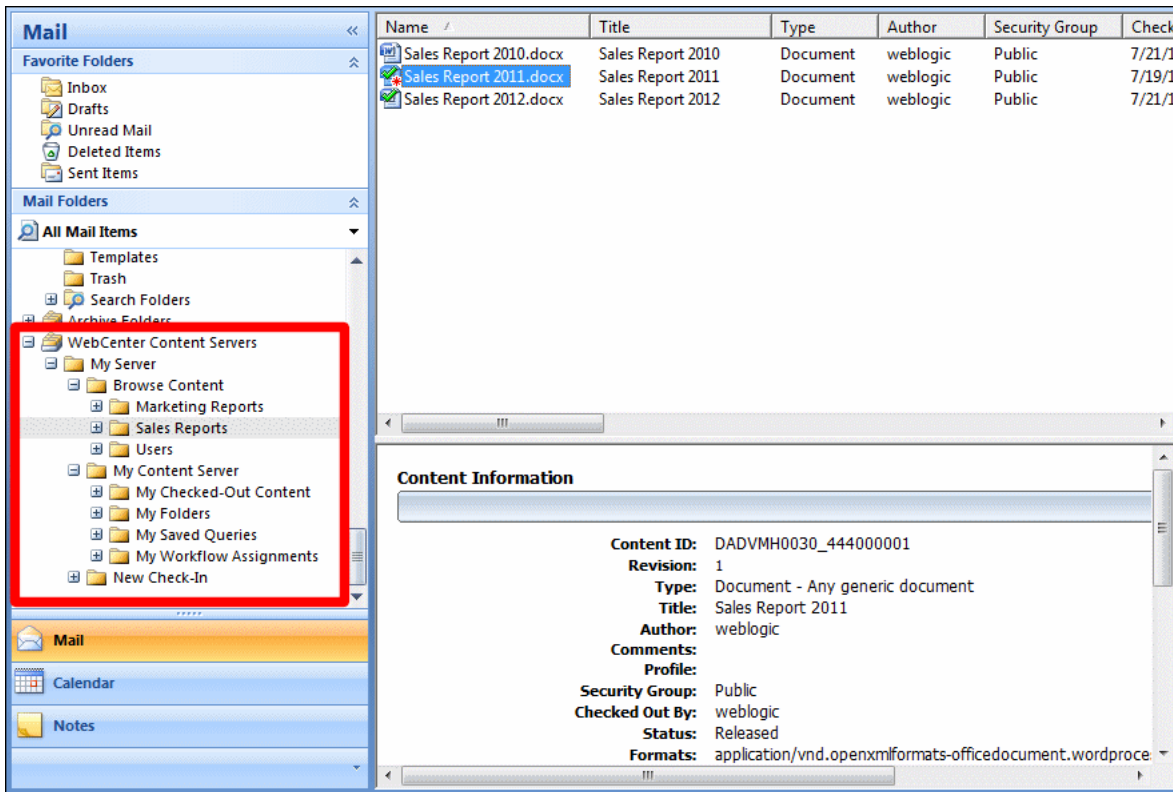
- [WebCenter Content Servers Hierarchy in Mail Folders](#)
- [Integration Items in Outlook 2002, 2003, and 2007](#)
- [Integration Items in Outlook 2010](#)

5.2.1 WebCenter Content Servers Hierarchy in Mail Folders

The Desktop client software adds a hierarchical folder structure called **WebCenter Content Servers** to the mail folders list in Microsoft Outlook (Figure 5–1). For more information on the integration hierarchy in your e-mail application, see Chapter 8, "Understanding the Integration Hierarchy."

Note: The WebCenter Content Servers hierarchy is not displayed in the mail folders list by default. You must specifically enable it. For more information, see Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy."

Figure 5–1 Integration Hierarchy in Microsoft Outlook 2007



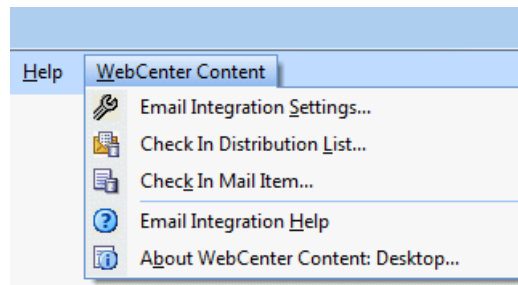
5.2.2 Integration Items in Outlook 2002, 2003, and 2007

The Desktop client software adds two integration items to the Microsoft Outlook 2002, 2003, and 2007 interfaces:

- [WebCenter Content Menu](#)
- [Oracle WebCenter Content Toolbar](#)

WebCenter Content Menu

The Desktop client software adds a menu called **WebCenter Content** to the menu bar in Microsoft Outlook 2002, 2003, and 2007 (Figure 5–2).

Figure 5–2 WebCenter Content menu in Microsoft Outlook 2007

The WebCenter Content menu contains the following menu items:

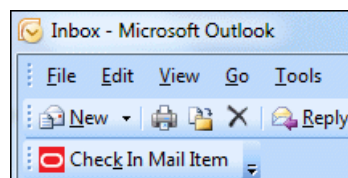
- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the e-mail client integration.
- **Check In Distribution List...:** This option opens a dialog where you can check an e-mail distribution list in to a content server. For more information, see [Section 12.10, "Working with Distribution Lists."](#)
- **Check In Mail Item...:** This option opens a dialog where you can check the currently selected e-mail message in to a content server. For more information, see [Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature."](#)
- **Email Integration Help:** This option launches the Desktop online help in your standard web browser.
- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.

Oracle WebCenter Content Toolbar

The Desktop client software adds a toolbar called **Oracle WebCenter Content** to Microsoft Outlook 2002, 2003, and 2007. If you do not see the toolbar, you can display it by selecting **View**, then **Toolbars**, and then **Oracle WebCenter Content**.

The toolbar items depend on the application context. In the main Outlook window, the Oracle WebCenter Content 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 WebCenter Content menu to do this.) For more information, see [Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature."](#)

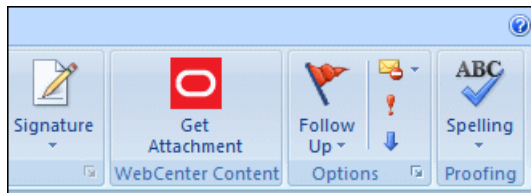
Figure 5–3 Check In Mail Item Option in Microsoft Outlook 2007

In an e-mail editing window (new message or forward message), the Oracle WebCenter Content toolbar contains the following option:

- **Get Attachment:** This option opens a dialog where you can select a file on a content server to be attached to the current e-mail message or hyperlinked in the

message. For more information, see [Section 12.7, "Attaching Content Files on a Server to E-Mail."](#)

Figure 5-4 Get Attachment Option in Microsoft Outlook 2007



5.2.3 Integration Items in Outlook 2010

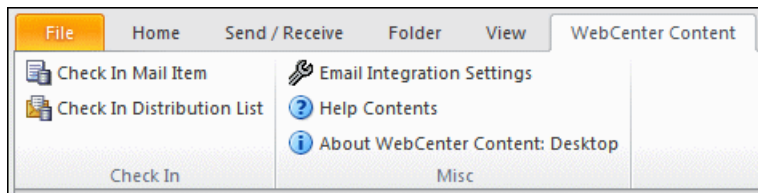
The Desktop client software adds integration items to three ribbons in the Microsoft Outlook 2010 interface:

- [WebCenter Content Ribbon](#)
- [Insert Ribbon](#)
- [Message Ribbon](#)

WebCenter Content Ribbon

The Desktop client software adds a ribbon called **WebCenter Content** to the Microsoft Outlook 2010 interface ([Figure 5-5](#)).

Figure 5-5 WebCenter Content Ribbon in Microsoft Outlook 2010



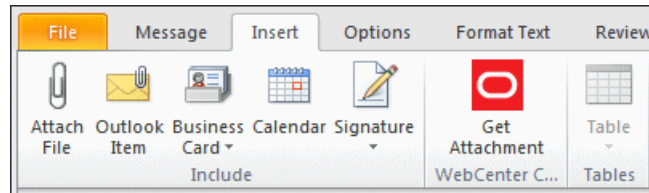
The WebCenter Content ribbon includes the following groups:

- **Check In:** This ribbon group contains the following option:
 - **Check In Mail Item:** This option opens a dialog where you can check the currently selected e-mail message in to a content server. For more information, see [Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature."](#)
 - **Check In Distribution List:** This option opens a dialog where you can check an e-mail distribution list in to a content server. For more information, see [Section 12.10, "Working with Distribution Lists."](#)
- **Misc:** This ribbon group contains the following options:
 - **Email Integration Settings:** This option opens a dialog where you can set a number of configuration options for the e-mail client integration.
 - **Help Contents:** This option launches the Desktop online help in your standard web browser.
 - **About WebCenter Content: Desktop:** This option opens a dialog that provides version information about the Desktop client software.

Insert Ribbon

The Desktop client software adds a **Get Attachment** item to the **Insert** ribbon in Microsoft Outlook 2010 (Figure 5–6). This item 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. For more information, see [Section 12.7, "Attaching Content Files on a Server to E-Mail."](#)

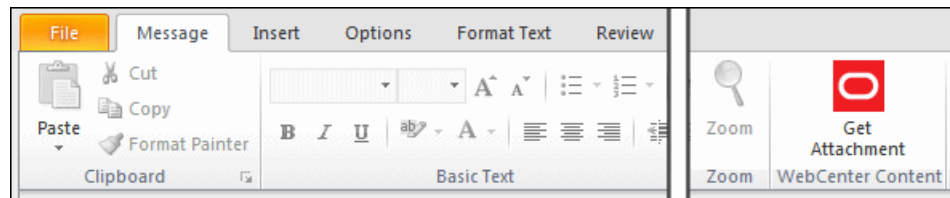
Figure 5–6 Integration Item in Insert Ribbon in Microsoft Outlook 2010



Message Ribbon

The Desktop client software also adds a **Get Attachment** item to the **Message** ribbon in Microsoft Outlook 2010 (Figure 5–7). This item 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. For more information, see [Section 12.7, "Attaching Content Files on a Server to E-Mail."](#)

Figure 5–7 Integration Item in Message Ribbon in Microsoft Outlook 2010



5.3 Integration into Lotus Notes

The Desktop client software can work with the Lotus Notes e-mail client version 6.5.2, 7.x, and 8 (through 8.5.3). Lotus Domino mail databases must be based on release 6, 7, or 8 mail templates (release 8 mail templates will not show the Oracle Content Servers node in the folders pane). After installing the integration software, you can interact with content servers and the files on them directly from the Lotus Notes client.

Desktop adds various integration features to Lotus Notes:

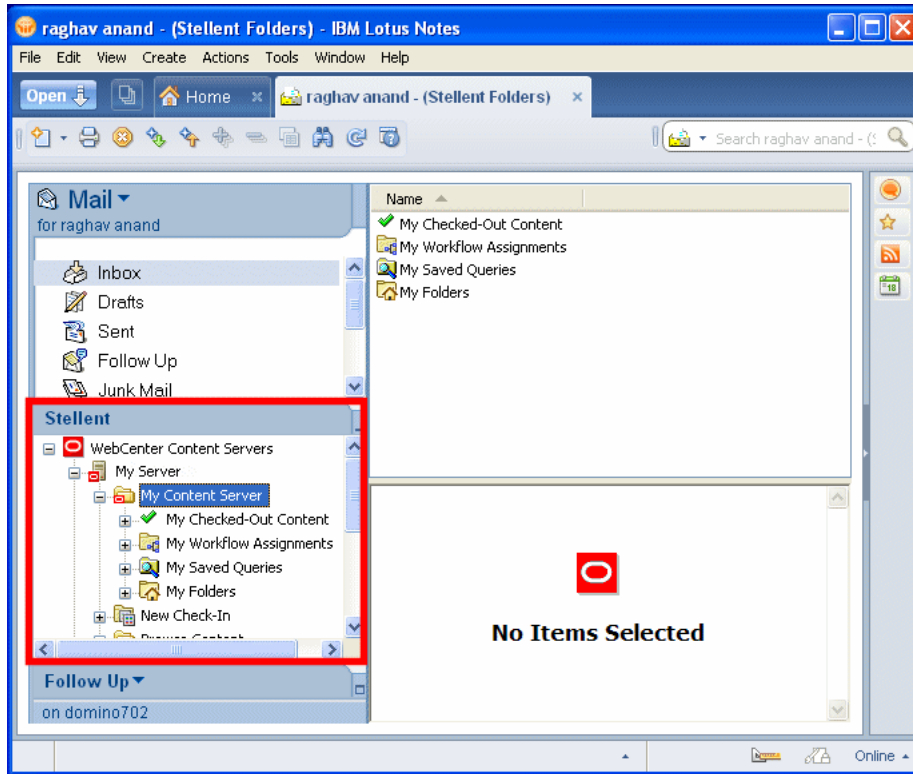
- [WebCenter Content Servers Hierarchy in Mail Pane](#)
- [Integration Items in Actions Menu](#)

5.3.1 WebCenter Content Servers Hierarchy in Mail Pane

The Desktop client software adds a hierarchical folder structure called **WebCenter Content Servers** to the mail pane in Lotus Notes (Figure 5–8). For more information on the integration hierarchy in your e-mail application, see [Chapter 8, "Understanding the Integration Hierarchy."](#)

Note: The WebCenter Content Servers hierarchy is not displayed in the mail folders list by default. You must specifically enable it. For more information, see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy."](#)

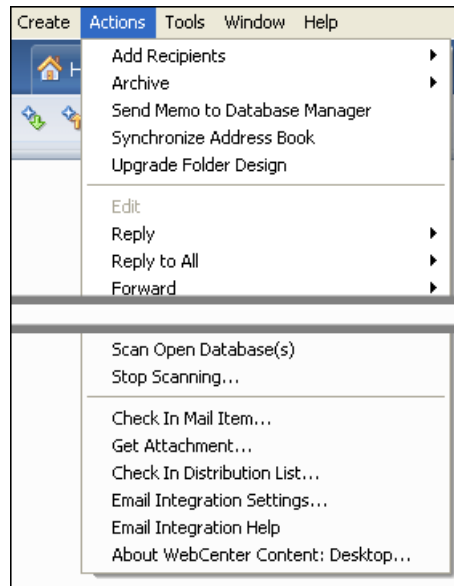
Figure 5–8 Integration Hierarchy in Lotus Notes 8.5



5.3.2 Integration Items in Actions Menu

The Desktop client software adds a number of new items to the **Actions** menu in Lotus Notes (Figure 5–9).

Figure 5–9 Actions Menu in Lotus Notes 8.5



The standard **Actions** menu in Lotus Notes includes the following integration items:

- **Check In Mail Item...:** This option opens a dialog where you can check the currently selected e-mail message in to a content server. For more information, see [Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature."](#)
- **Get Attachment...:** This option opens a dialog where you can select a file on a content server to be attached to the current e-mail message or hyperlinked in the message. For more information, see [Section 12.7, "Attaching Content Files on a Server to E-Mail."](#)
- **Check In Distribution List...:** This option opens a dialog where you can check an e-mail distribution list in to a content server. For more information, see [Section 12.10, "Working with Distribution Lists."](#)
- **Email Integration Settings...:** This option opens a dialog where you can set a number of configuration options for the e-mail client integration.
- **Email Integration Help:** This option launches the Desktop online help in your standard web browser.
- **About WebCenter Content: Desktop...:** This option opens a dialog that provides version information about the Desktop client software.

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 WebCenter Content Servers hierarchy in the mail pane, the contents of that object are displayed on the right, in the content pane. It may,

for example, show a list of all files in the current content folder. 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 can enable it. For more information, see [Section 5.6, "Showing or Hiding Panes."](#)

Content Management Status

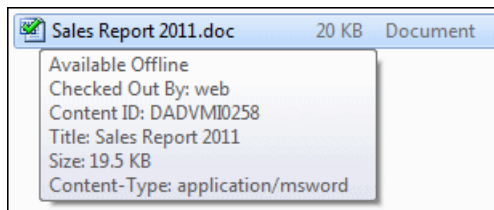
Managed content files listed in the content pane may have a symbol in their file icon to indicate their content management status. For example, if the file is currently checked out by yourself, this is visualized using a green check mark, as shown in [Figure 5–10](#). For a full explanation of all content management status icons, see [Section 9.7, "Content File Status."](#)

Figure 5–10 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 5–11](#).

Figure 5–11 screen Tip Showing Content Management Information About File



5.5 Showing or Hiding the WebCenter Content Servers Hierarchy

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

Note: This feature is not supported for Lotus Domino 8 e-mail.

In supported versions of 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.

To show or hide the WebCenter Content Servers hierarchy in Microsoft Outlook or Lotus Notes:

1. Launch your e-mail application.
2. **Microsoft Outlook:** Open the **WebCenter Content** menu or ribbon and then choose **Email Integration Settings...**

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

The Email Checkin Settings dialog opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).

3. Select or clear the **Show WebCenter 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.

5.6 Showing or Hiding Panes

Some of the panes your e-mail application can be turned on and off:

- [Section 5.6.1, "Showing or Hiding the Folders Pane"](#)
- [Section 5.6.2, "Showing or Hiding the Preview Pane"](#)

5.6.1 Showing or Hiding the Folders Pane

The folders pane shows the mail folders tree in your e-mail application. If you do not see the folders pane, you can enable it:

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

5.6.2 Showing or Hiding the Preview Pane

If you select an item in the Oracle Content Server hierarchy in the mail folders tree, the preview pane in your e-mail application shows information about the selected item (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 for that server.

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**.

5.7 Modifying the Column Settings in the Content Pane

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

To change the column display settings:

1. Go to any folder on the content server in the WebCenter Content Servers hierarchy for which you want to change the column display settings.
2. Right-click any of the column headings in the content pane, and choose **Column Settings...**

The Column Settings dialog opens (see [Section A.6, "Column Settings \(or Choose Details\) Dialog"](#)).

3. Make changes to the column display, order, and width settings as desired.
4. Click **OK** when you are done. (The changes take effect immediately and they apply to the entire content server.)

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

Integration into Web Browsers

This section covers these topics:

- [Section 6.1, "Web Browser Search Plug-In"](#)
- [Section 6.2, "Adding the Oracle WebCenter Content Search Provider in Your Web Browser"](#)
- [Section 6.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine"](#)
- [Section 6.4, "Searching for Managed Content in Your Web Browser"](#)
- [Section 6.5, "Removing the Oracle WebCenter Content Search Provider from Your Web Browser"](#)

6.1 Web Browser Search Plug-In

Oracle WebCenter Content: Desktop 11gR1 provides plug-ins for various popular web browsers which enable you to search for content on an Oracle WebCenter Content Server instance directly from the search field in your web browser. The following web browsers are supported:

- Microsoft Internet Explorer 7.0 or higher
- Mozilla Firefox 3.5 or higher
- Google Chrome 10 or higher

Please note the following:

- The Oracle WebCenter Content Server browser plug-in is available only if this feature has been enabled on the content server (on the DesktopIntegrationSuite component configuration page).
- The default search provider name for an Oracle WebCenter Content Server instance is 'Oracle WebCenter Content Search', but this can be changed by the content server administrator. Contact your Content Server system administrator if you are not sure what the search provider name for an Oracle WebCenter Content Server instance is.
- A content server search provider in your web browser is for a specific Oracle WebCenter Content Server instance only. You cannot search multiple content servers using a single search provider.
- You cannot add two search providers for the same Oracle WebCenter Content Server instance. Once you have added a search provider, it will not be added again for the same Content Server instance.

- The search results are displayed in the web browser, in the Oracle WebCenter Content Server web interface. See *Using Oracle WebCenter Content* for more information on working with the web interface.
- If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.
- The search performed in your web browser mimics the Quick Search feature in the Oracle Content Server web interface. See *Using Oracle WebCenter Content* for further details on this feature.
- See [Section 6.4, "Searching for Managed Content in Your Web Browser"](#) for more information on how to use the Oracle WebCenter Content Search provider in your web browser.

6.2 Adding the Oracle WebCenter Content Search Provider in Your Web Browser

The procedure to add the Oracle WebCenter Content search engine depends on the web browser:

- [Section 6.2.1, "Adding the Oracle WebCenter Content Search Provider in Internet Explorer"](#)
- [Section 6.2.2, "Adding the Oracle WebCenter Content Search Engine in Firefox"](#)
- [Section 6.2.3, "Adding the Oracle WebCenter Content Search Engine in Google Chrome"](#)

Note: Ask the server administrator if you are not sure if the web browser plug-in has been enabled for that server.

6.2.1 Adding the Oracle WebCenter Content Search Provider in Internet Explorer

You can add a search provider for an Oracle WebCenter Content Server instance in Internet Explorer in either of two ways:

- Using the My Downloads page in the Oracle WebCenter Content Server web interface
- Using the search box in Internet Explorer

Note: The search box method is supported only in Internet Explorer 7 and 8, not in 9.

Adding the Oracle WebCenter Content Search Provider Using the My Downloads page

To add the Oracle WebCenter Content search provider to Internet Explorer using the My Downloads page in Oracle WebCenter Content Server:

1. Open Internet Explorer.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search provider for.

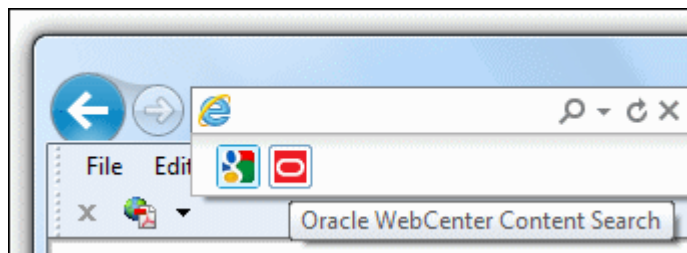
3. Open the **My Content Server** tray or menu.
4. Click **My Downloads**.
The My Downloads for *USER* page opens.
5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)
The Add Search Provider dialog opens.
6. Optionally, select the 'Make this my default search provider' check box.
7. Click **Add** to make the search provider available in the web browser ([Figure 6–1](#)).

Adding the Oracle WebCenter Content Search Provider From the Browser Search Box

To add the Oracle WebCenter Content search provider to Internet Explorer 7 and 8 using the browser search box:

1. Open Internet Explorer.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search provider for.
3. Click the arrow to the right of the search box in your browser. (This arrow acquires a colored glow, indicating that the website offers a search provider that can be installed in Internet Explorer.)
4. Point to **Add Search Providers** and click the search provider name for the content server to make the search provider available in the web browser. The default search provider name is 'Oracle WebCenter Content Search', but the server administrator may have changed this.

Figure 6–1 Oracle WebCenter Content Search Provider Added to Internet Explorer 9



6.2.2 Adding the Oracle WebCenter Content Search Engine in Firefox

You can add a search engine for an Oracle WebCenter Content Server instance in Firefox in either of two ways:

- Using the My Downloads page in the Oracle WebCenter Content Server web interface
- Using the search bar in Firefox

Adding the Oracle WebCenter Content Search Engine Using the My Downloads page

To add the Oracle WebCenter Content search engine to Firefox using the My Downloads page in Oracle WebCenter Content Server:

1. Open Firefox.

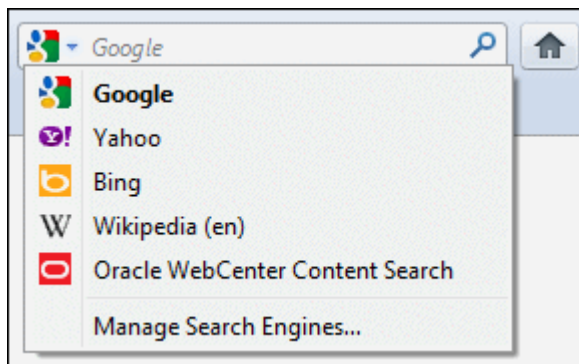
2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Open the **My Content Server** tray or menu.
4. Click **My Downloads**.
The My Downloads for *USER* page opens.
5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)
The Add Search Engine dialog opens.
6. Optionally, select the 'Start using it right away' check box.
7. Click **Add** to make the search engine available in the web browser (Figure 6–2).

Adding the Oracle WebCenter Content Search Engine From the Browser Search Box

To add the Oracle WebCenter Content search engine to Firefox using the browser search bar:

1. Open Firefox.
2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Click the arrow in the browser search bar to open the search engine list. (The search engine button acquires a colored glow, indicating that the website offers a search engine that can be installed in Firefox.)
4. Click **Add "Search_Engine"** to make the search engine available in the web browser (Figure 6–2). The default search engine name is 'Oracle WebCenter Content Search', but the server administrator may have changed this.

Figure 6–2 Oracle WebCenter Content Search Engine Added to Firefox



6.2.3 Adding the Oracle WebCenter Content Search Engine in Google Chrome

To add the Oracle WebCenter Content search engine to Google Chrome:

Note: These instructions assume Google Chrome 14. The steps may be different for other Chrome versions.

1. Open Google Chrome.

2. Log in to the Oracle WebCenter Content Server instance you want to add the search engine for.
3. Open the **My Content Server** tray or menu.
4. Click **My Downloads**.
The My Downloads for *USER* page opens.
5. Click **Add browser search** in either of the Desktop client table entries. (It does not matter whether you click it for the 32-bit or 64-bit version.)
6. Depending on your Chrome version, the search engine for the current Oracle WebCenter Content Server instance is installed and enabled in the web browser immediately, or you can first modify the search engine name, keyword, or URL before installing it.

6.3 Setting a Keyword for the Oracle WebCenter Content Search Engine

You can speed up searches in your web browser by assigning keywords to a search provider. This allows you to search directly from the browser's address bar without having to select the search engine to use first. For example, if you set 'cs' as the keyword for an Oracle WebCenter Content search engine, then specifying '*cs Search_Term*' in the address bar of your web browser immediately performs the Quick Search query on the Oracle WebCenter Content Server associated with the keyword.

The procedure to set a keyword for the Oracle WebCenter Content search engine depends on the web browser:

- [Section 6.3.1, "Setting a Search Engine Keyword in Firefox"](#)
- [Section 6.3.2, "Setting a Search Engine Keyword in Google Chrome"](#)

6.3.1 Setting a Search Engine Keyword in Firefox

To set a keyword for the Oracle WebCenter Content search engine in Firefox:

1. Open Firefox.
2. Click the arrow in the browser search bar to open the search engine list.
3. Click **Manage Search Engines...**
The Manage Search Engine List dialog opens.
4. Select the Oracle WebCenter Content search engine and click **Edit Keyword...**
The Edit Keyword dialog opens.
5. Enter the keyword (for example, *cs*) and click **OK**.

Note: By default, no search engine keyword is associated with an Oracle WebCenter Content Server instance.

You can now use the defined keyword to perform a quick search on the associated Oracle WebCenter Content Server instance directly from the address bar.

6.3.2 Setting a Search Engine Keyword in Google Chrome

To set a keyword for the Oracle WebCenter Content search engine in Google Chrome:

Note: These instructions assume Google Chrome 14. The steps may be different for other Chrome versions.

1. Open Google Chrome.
2. Click the configuration icon (wrench) on the browser toolbar.
3. Click **Options**.
4. On the Basics page, click **Manage search engines...**
The Search Engines page opens.
5. Under **Other search engines**, select the Oracle WebCenter Content search engine and specify the keyword (for example, `cs`). You can also change the search engine name if you want.

Note: The default search engine keyword for an Oracle WebCenter Content Server instance is its main URL, for example `server1.example.com`.

6. Close the Search Engines page.

You can now use the defined keyword to perform a quick search on the associated Oracle WebCenter Content Server instance directly from the address bar.

6.4 Searching for Managed Content in Your Web Browser

You can use the web browser plug-in to search for managed content on Oracle WebCenter Content Server instances directly from your web browser.

The procedure to search for managed content depends on the web browser:

- [Section 6.4.1, "Searching for Managed Content in Internet Explorer"](#)
- [Section 6.4.2, "Searching for Managed Content in Firefox"](#)
- [Section 6.4.3, "Searching for Managed Content in Google Chrome"](#)

Note: See your web browser help for additional information about searching.

6.4.1 Searching for Managed Content in Internet Explorer

To search for content items on an Oracle WebCenter Content Server instance in Internet Explorer:

1. Open Internet Explorer.
2. Click the arrow to the right of the search box (Internet Explorer 7 and 8) or address bar (Internet Explorer 9), and select the Oracle WebCenter Content search engine.
3. Enter your search term and press Enter.

4. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

6.4.2 Searching for Managed Content in Firefox

To search for content items on an Oracle WebCenter Content Server instance in Firefox:

1. Open Firefox.
2. You can search for content from the search bar or using a keyword.

From the search bar:

- a. Click the arrow in the browser search bar and select the Oracle WebCenter Content search engine.
- b. Enter your search term in the search bar and press Enter.

Using a keyword:

- a. In the browser address bar, type the search engine keyword associated with the Oracle WebCenter Content Server instance you want to search followed by the search term, for example:

```
cs "sales report"
```

Note: By default, no search engine keyword is associated with an Oracle WebCenter Content Server instance. See [Section 6.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine"](#) for instructions on how to set one.

- b. Press Enter.
3. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

6.4.3 Searching for Managed Content in Google Chrome

To search for content items on an Oracle WebCenter Content Server instance in Google Chrome:

1. Open Google Chrome.
2. In the browser address bar, type the search engine keyword associated with the Oracle WebCenter Content Server instance you want to search followed by the search term, for example:

```
cs "sales report"
```

Note: The default search engine keyword for an Oracle WebCenter Content Server instance is its main URL, for example server1.example.com, but you can change it to something more meaningful. See [Section 6.3, "Setting a Keyword for the Oracle WebCenter Content Search Engine."](#)

3. The search results are displayed in the Oracle WebCenter Content Server web interface.

If you are currently logged in to the content server (that is, there is a login cookie for the server on your computer), you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

6.5 Removing the Oracle WebCenter Content Search Provider from Your Web Browser

The procedure to remove the Oracle WebCenter Content search provider depends on the web browser:

- [Section 6.5.1, "Removing the Oracle WebCenter Content Search Provider from Internet Explorer"](#)
- [Section 6.5.2, "Removing the Oracle WebCenter Content Search Engine from Firefox"](#)
- [Section 6.5.3, "Removing the Oracle WebCenter Content Search Engine from Google Chrome"](#)

6.5.1 Removing the Oracle WebCenter Content Search Provider from Internet Explorer

To remove the Oracle WebCenter Content search provider from Internet Explorer:

Internet Explorer 7 and 8

1. Open Internet Explorer.
2. Click the arrow to the right of the search box in your browser.
3. Click **Change Search Defaults...**

The Change Search Defaults dialog opens.

4. Select the search provider for the Oracle WebCenter Content Server instance ('Oracle WebCenter Content Search' by default) and click **Remove**.
5. Click **OK**.

Internet Explorer 9

1. Open Internet Explorer.
2. Open the Tools menu and choose **Internet options**.
3. On the General tab, click **Settings** in the **Search** section.
4. Select the search provider for the Oracle WebCenter Content Server instance and click **Remove**.
5. Click **Close**.

6.5.2 Removing the Oracle WebCenter Content Search Engine from Firefox

To remove the Oracle WebCenter Content search engine from Firefox:

1. Open Firefox.
2. Click the arrow in the browser search bar to open the search engine list.
3. Click **Manage Search Engines...**
4. Select the search engine for the Oracle WebCenter Content Server instance and click **Remove**.
5. Click **OK**.

6.5.3 Removing the Oracle WebCenter Content Search Engine from Google Chrome

To remove the Oracle WebCenter Content search engine from Google Chrome:

Note: These instructions assume Google Chrome 14. The steps may be different for other Chrome versions.

1. Open Google Chrome.
2. Click the configuration icon (wrench) on the browser toolbar.
3. Click **Options**.
4. On the Basics page, click **Manage search engines...**
The Search Engines page opens.
5. Select the search engine for the Oracle WebCenter Content Server instance and click the 'X' to the right to remove it.
6. Close the Search Engines page.

Working with Content Server Connections

This section covers these topics:

- [Section 7.1, "About Content Server Connections"](#)
- [Section 7.2, "Content Server Types"](#)
- [Section 7.3, "Content Server Capabilities"](#)
- [Section 7.4, "Content Server URLs"](#)
- [Section 7.5, "Online vs. Offline Servers"](#)
- [Section 7.6, "Server Context Menus"](#)
- [Section 7.7, "Adding a Content Server Connection"](#)
- [Section 7.8, "Viewing or Editing Content Server Connection Properties"](#)
- [Section 7.9, "Removing a Content Server Connection"](#)
- [Section 7.10, "Connecting to a Content Server"](#)
- [Section 7.11, "Logging Off a Content Server"](#)
- [Section 7.12, "Working with a Content Server Offline"](#)
- [Section 7.13, "Setting Metadata To Be Remembered for Form-Based Check-Ins"](#)
- [Section 7.14, "Setting the Authentication Method"](#)
- [Section 7.15, "Identifying the URLs for Oracle WebCenter Content Server"](#)

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 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 client can connect to these types of servers:

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




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

- Content DB Server:** This is an Oracle Content Database (Oracle Content DB) server. These servers offer some content management integration. You can open files directly from the server and save files to it, but you cannot search for files on the server using the Desktop client software.
- WebDAV Server:** This is a server that is not an Oracle WebCenter Content Server or Oracle Content Database server which 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 the Desktop client software.

You select the content server type when you create the server connection (see [Section 7.7, "Adding a Content Server Connection"](#)). Consult your system administrator if you are not sure which server type to use.

Server Type Icons

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

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

7.3 Content Server Capabilities

The Desktop client software provides different content management features depending on the server type and configuration (see [Section 7.2, "Content Server Types"](#) above), as outlined in the table below.

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

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

Notes

1. If any required metadata is missing, you may be prompted to provide it depending on the configuration settings for the folder.

2. If any required metadata is missing, the check-in operation will fail if no default folder metadata has been defined.

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 (for Oracle WebCenter Content Server instances). 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 WebCenter Content Server

Oracle WebCenter Content Server instances 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 [Section 7.15, "Identifying the URLs for Oracle WebCenter Content Server"](#) for a way to find out what the URL of an Oracle WebCenter Content Server instance is. You can also ask your system administrator what URLs to use.

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

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

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

Oracle Content DB Servers and WebDAV Servers

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

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

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 [Section 9.5, "Local Caching of Content Files"](#)). You can specifically designate content files and entire folders to be available offline (see [Section 14.2, "Making Folders and Files Available Offline"](#)). Copies of the latest file revisions are then retrieved from the content server and put in the local cache on your computer. Working with a content server in offline mode may be useful if you want to access some files on that server when no connection to the server is available (for example, outside of the workplace). If a server is in offline mode, then the integration hierarchy for that server includes an **Offline Files** node, which provides easy access to all files on the server that you made available offline.

To work with a content server in offline mode, right-click that server in the integration hierarchy or the content pane, and choose **Work Offline** in the context menu. The server icon then changes to include an offline indicator ([Figure 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 WebCenter Content Server



7.6 Server Context Menus

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

- **Open:** Opens the selected server in a new window, with the folders pane not visible (when selected in folders pane), or opens the selected server in the content pane (when selected in the content pane).
- **Search...** (Oracle WebCenter Content Server only): Opens a search form on the current content server where you can specify criteria and search for items on that server based on these criteria. For more information, see [Section 10.3, "Searching for Content Files."](#)
- **Show Quick Search** (Oracle WebCenter Content Server only): Shows or hides Oracle WebCenter Content Server's Quick Search feature in Windows Explorer. For more information, see [Section 3.9, "Quick Search Integration."](#)
- **Log Off:** Breaks the connection to the current content server. This means that you will have to provide your login credentials (user name and password) again the next time you want to access that server. For more information, see [Section 7.11, "Logging Off a Content Server."](#)
- **Work Offline:** Disconnects you from the current content server. This means that you will only have access to the files on that server that have been marked to be available offline. For more information, see [Section 7.12, "Working with a Content Server Offline"](#) and [Chapter 14, "Working with Offline Content."](#)
- **Remove:** Enables you to remove the selected server connection from the integration hierarchy. For more information, see [Section 7.9, "Removing a Content Server Connection."](#)

- **Properties:** Opens a dialog which shows a number of properties of the current content server. For more information, see [Section 7.8, "Viewing or Editing Content Server Connection Properties."](#)
- **Add Server...:** Opens a dialog where you can add a new content server connection to the integration hierarchy. For more information, see [Section 7.7, "Adding a Content Server Connection."](#)
- **Save Query:** Saves the current search query in your list of saved queries (see [Section 8.4.1.3, "My Saved Queries"](#)). 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.

To add a new content server connection:

1. Windows Explorer:

- a. Select the top-level integration folder ("WebCenter Content Servers") in your navigation pane. You may need to enable its display in your e-mail application (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)).
- b. Move the mouse cursor onto the WebCenter Content Servers node or to an unused area in the content pane (that is, away from any of the items listed in it), and right-click.
- c. Choose **Add Server...** in the context menu.

The Add Server dialog opens (see [Section A.1, "Add Server Dialog"](#)).

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List**.

The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).

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

The Add Server dialog opens (see [Section A.1, "Add Server Dialog"](#)).

Microsoft Outlook:

- a. Open the **WebCenter Content** menu or ribbon and choose **Email Integration Settings....**, then **Edit Server List**, and then **New...**

or

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

The Add Server dialog opens (see [Section A.1, "Add Server Dialog"](#)).

Lotus Notes:

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

or

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

The Add Server dialog opens (see [Section A.1, "Add Server Dialog"](#)).

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

For more information, see [Section 7.2, "Content Server Types."](#) Contact your system administrator if you are not sure which server type to use.

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

A URL is automatically inserted using the name you specified as the server name. You may need to modify this information to suit your particular server. Contact your system administrator if you do not know exactly what WebDAV URL to use. See also [Section 7.4, "Content Server URLs"](#) and [Section 7.15, "Identifying the URLs for Oracle WebCenter Content Server."](#)

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

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

A URL is automatically inserted using the name you specified as the server name. You may need to modify this information to suit your particular server. Contact your system administrator if you do not know exactly what CGI URL to use. See also [Section 7.4, "Content Server URLs"](#) and [Section 7.15, "Identifying the URLs for Oracle WebCenter Content Server."](#)

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** check box and provide the URL of the single sign-on (SSO) server that is used to control access to the content server. Contact your system administrator if you are not sure whether you should select this option.

Please note that the SSO section is not available for Oracle WebCenter Content Server instances.

7. Click **Options** to open the Server Options dialog (see [Section A.2, "Server Options Dialog"](#)) for Oracle WebCenter Content Server instances, where you can set the authentication method for the server as well as the metadata fields whose values should be remembered for new check-ins. Click **OK** when you are done.
8. Click **OK** in the Add Server dialog.
The new server connection is now added to the integration hierarchy (under "WebCenter Content Servers"), and is available to all other integrated applications.

Considerations

Please note the following with regard to content server connections:

- When you add a new server connection, it is available on your own computer only, not on any other user's computer.
- When you create a new server connection, that connection will be available to all supported applications on your computer that you use to interact with the content server.
- If you uninstall and then reinstall the Desktop software (see [Section 2.5, "Installing the Latest Version of the Desktop Client Software"](#)), any server connections that you set up earlier will continue to be available after reinstalling the software.

7.8 Viewing or Editing Content Server Connection Properties

To view or edit the properties of an existing content server connection:

1. Windows Explorer:

- a. Select a content server in the WebCenter Content Servers integration hierarchy.
- b. Right-click and choose **Properties** in the context menu.
The Server Properties dialog opens (see [Section A.3, "Server Properties Dialog"](#)).

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List...**
The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).
- b. Select the server connection whose properties you want to view, and choose **View...**
The Edit Server dialog opens (see [Section A.5, "Edit Server Dialog"](#)).

Microsoft Outlook:

- a. Open the **WebCenter Content** menu or ribbon and choose **Email Integration Settings.....**
The Email Checkin Settings dialog opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).
- b. Choose **Edit Server List**.
The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).
- c. Select the server connection whose properties you want to view, and choose **View...**
The Edit Server dialog opens (see [Section A.5, "Edit Server Dialog"](#)).

Lotus Notes:

- a. Open the **Actions** menu and choose **Email Integration Settings.....**
The Email Checkin Settings dialog opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).
 - b. Choose **Edit Server List**.
The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).
 - c. Select the server connection whose properties you want to view, and choose **View....**
The Edit Server dialog opens (see [Section A.5, "Edit Server Dialog"](#)).
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 [Chapter 9.5, "Local Caching of Content Files"](#)). If you modify the server name, it is updated automatically in the WebCenter Content Servers integration hierarchy.
- For servers of type 'WebCenter 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. For more information, see [Section A.2, "Server Options Dialog."](#)

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.

To remove a server connection:

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

Microsoft Word, PowerPoint, and Excel:

- a. Open the **WebCenter Content** menu or ribbon, and then choose **Edit Server List....**
The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).

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

Microsoft Outlook:

- a. Open the **WebCenter Content** menu or ribbon and choose **Email Integration Settings.....**

The Email Checkin Settings dialog opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).

- b. Choose **Edit Server List**.

The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).

- 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 opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).

- b. Choose **Edit Server List**.

The Edit Server List dialog opens (see [Section A.4, "Edit Server List Dialog"](#)).

- 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 WebCenter 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 scheme used for the content server. In either case, provide your assigned user name and password to gain access to the files on the server.

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

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 WebCenter Content Servers integration hierarchy and choose **Log Off** in the context menu. You can then no longer access the content on the server until you log back on.

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

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

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. For more information, see [Section 7.5, "Online vs. Offline Servers"](#) and [Chapter 9.5, "Local Caching of Content Files."](#)

To work with a content server in offline mode, right-click that server in the integration hierarchy or the content pane, and choose **Work Offline** in the context menu. The server icon then changes to include an offline indicator ([Figure 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 Oracle WebCenter Content Server



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

See also [Chapter 14, "Working with Offline Content."](#)

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

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

You can set the metadata fields to be remembered for a server when you initially create a connection to that server (see [Section 7.7, "Adding a Content Server Connection"](#)), or you can modify this setting later.

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

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

In **Microsoft Outlook**, open the **WebCenter Content** menu or ribbon, 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 opens (see [Section A.4, "Edit Server List Dialog"](#)).

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

The Edit Server dialog opens (see [Section A.5, "Edit Server Dialog"](#)).

3. Click **Options...**

The Server Options dialog opens (see [Section A.2, "Server Options Dialog"](#)).

4. Open the **Remember Metadata Fields** tab (see [Section A.2.1, "Server Options: Remember Metadata Fields"](#)), 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.

7.14 Setting the Authentication Method

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

You can set the authentication method for a server when you initially create a connection to that server (see [Section 7.7, "Adding a Content Server Connection"](#)), or you can modify it later.

To set the authentication method for a server:

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

In **Microsoft Outlook**, open the **WebCenter Content** menu or ribbon, 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 opens (see [Section A.4, "Edit Server List Dialog"](#)).

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

The Edit Server dialog opens (see [Section A.5, "Edit Server Dialog"](#)).

3. Click **Options...**

The Server Options dialog opens (see [Section A.2, "Server Options Dialog"](#)).

4. Open the **Authentication** tab (see [Section A.2.2, "Server Options: Authentication"](#)), 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.

7.15 Identifying the URLs for Oracle WebCenter Content Server

When creating a content server connection, you must provide the WebDAV URL for that server, and possibly its CGI URL (depending on the server type). For Oracle WebCenter Content Server instances, 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 WebCenter 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 7-3](#).

Figure 7-3 CGI URL of Oracle WebCenter Content Server



You can copy and paste this URL to the URL fields in the Add Server dialog (see [Section A.1, "Add Server Dialog"](#)). 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.

Understanding the Integration Hierarchy

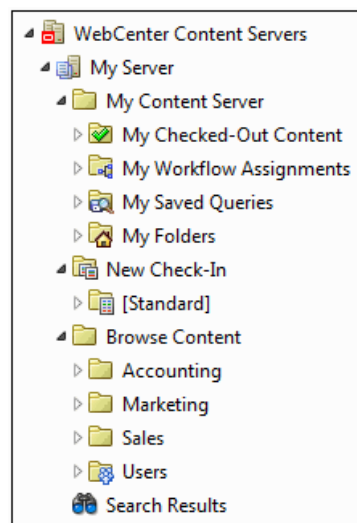
This section covers these topics:

- [Section 8.1, "About the Integration Hierarchy"](#)
- [Section 8.2, "Top-Level Node \("WebCenter Content Servers"\)"](#)
- [Section 8.3, "Content Server Nodes"](#)
- [Section 8.4, "Oracle WebCenter Content Server Repositories"](#)
- [Section 8.5, "Oracle Content Database Repositories"](#)
- [Section 8.6, "WebDAV Server Repositories"](#)

8.1 About the Integration Hierarchy

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

Figure 8-1 Example of Integration Hierarchy with One Oracle WebCenter Content Server Connection (Fully Expanded)



If you do not see the folders pane in Windows Explorer or your e-mail application, you need to turn it on. For example, in Windows Explorer on Windows 7, choose **Organize**, then **Layout**, and then **Navigation Pane**. Also, you may need to enable the integration hierarchy in your e-mail application as it is not displayed by default (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)).

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

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

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

The top-level node in the integration hierarchy is always called "WebCenter Content Servers." You cannot modify its name nor can you delete this node. You may need to enable its display in your e-mail application as it is not displayed by default (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)).

With the top-level WebCenter Content Servers node in the integration hierarchy selected, the content pane shows all defined content server connections. How the information is displayed depends on the view mode: icons, lists, details, etc. The icon of each server denotes its type (see [Section 7.2, "Content Server Types"](#)).

8.3 Content Server Nodes

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

The display name of each server in the integration hierarchy is the name as provided in the Add Server dialog when the server connection was created (see [Section 7.7, "Adding a Content Server Connection"](#)).

The icon for each server in the integration hierarchy denotes its type (see [Section 7.2, "Content Server Types"](#)). The available nodes and folders in a server tree depend on the server type and configuration:

- [Oracle WebCenter Content Server Repositories](#) (see [Section 8.4](#))

- Oracle Content Database Repositories (see Section 8.5)
- WebDAV Server Repositories (see Section 8.6)

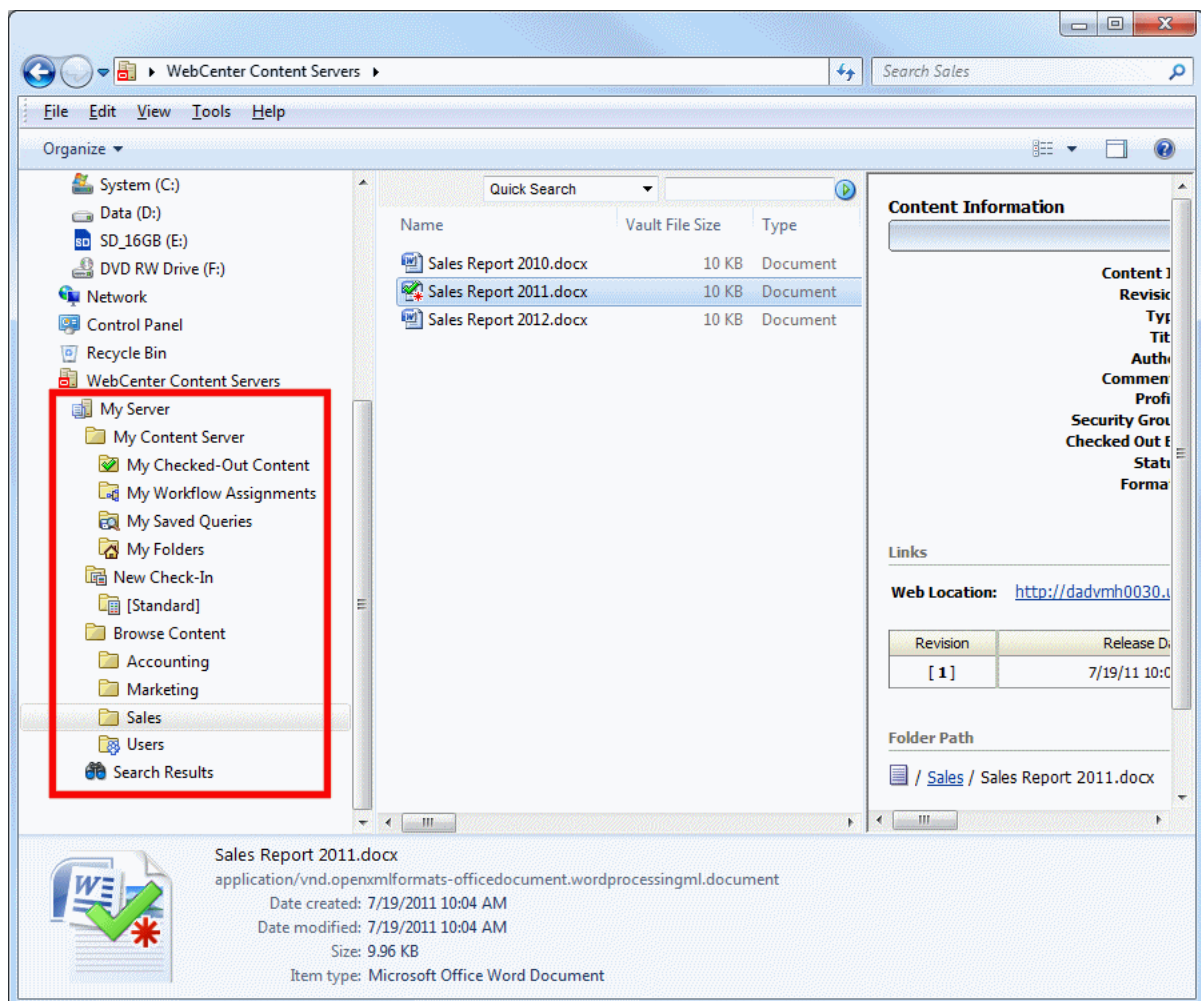
8.4 Oracle WebCenter Content Server Repositories

The Desktop client software provides direct access to content on Oracle WebCenter Content Server instances. This server type is represented in the integration hierarchy using the icon shown in Figure 8–2.

Figure 8–2 Icon for Oracle WebCenter Content Server



Figure 8–3 Oracle WebCenter Content Server 11gR1 Instance in Integration Hierarchy



The integration hierarchy for Oracle WebCenter Content Server instances typically includes the following main nodes:

- My Content Server
- New Check-In

- [Browse Content](#)
- [Offline Files](#)
- [Search Results](#)

Please note that the integration hierarchy for a Content Server instance may look differently depending on the content server version and configuration; specifically, the Desktop component version and the active folders component: Framework Folders, Folders_g, or Folders. This section describes the default integration hierarchy for the latest Desktop 11gR1 client software connecting to the latest Oracle WebCenter Content Server 11gR1 version with the latest Desktop and Framework Folders components running. If you connect to an older Content Server version or a server with a different setup, then that server may have an integration hierarchy with different or rearranged nodes. In addition, not all nodes described in this section may be available.

8.4.1 My Content Server

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

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

Note: All these nodes are also included in the My Content Server tray or menu of Oracle WebCenter Content Server's web interface.

8.4.1.1 My Checked-Out Content



The My Checked-Out Content node in the integration hierarchy of an Oracle WebCenter 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 WebCenter 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 WebCenter Content Server 11gR1 instance.

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 [Section 9.7, "Content File Status"](#)).

Table 8–1 Status Icons for Content Items

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

8.4.1.2 My Workflow Assignments

The My Workflow Assignments node in the integration hierarchy of an Oracle WebCenter Content Server instance lists all content files in a workflow on that particular server that you are assigned to review and then approve or reject. You see only workflow assignments for yourself, not for others. You can approve or reject the items directly in this list (see [Section 13.3, "Approving or Rejecting Files in Workflows"](#)).

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

Note: The My Workflow Assignments node is available only if you are connecting to a Content Server 11gR1 instance.

See *Using Oracle WebCenter Content* for more information about workflows and also [Chapter 13, "Working with Managed Content in Workflows."](#)

8.4.1.3 My Saved Queries

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

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

Note: The My Saved Queries node is available only if you are connecting to a Content Server 11gR1 instance.

Double-click a saved query (or select it and press Enter) to execute the query and display a search results list in the content pane containing all items on the content

server that meet the search criteria. It is important to note that the items in the search results list are the actual files, not copies or pointers of some sort. That is why you may see the content displayed in multiple places, such as in a content folder and in the search results list. You can interact with content items in the search results list just as you could any other content item on the server. For example, you can conveniently open, view, check out, and check in content items in the list (see [Chapter 10, "Working with Managed Content Files in Windows Explorer"](#)). If you delete a file from the search results list, you are removing the actual content item from the content server.

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

You can also drag and drop a saved query to anywhere within the content folders tree under Browse Content. This creates a query folder, which is a dynamic folder that always contains all content items on the server that meet the search criteria and for which you have access privileges on the server. The default query folder name is the same name as the original saved query with 'Copy of' preceding it, but you can rename the folder.

See [Section 10.4, "Working with Saved Search Queries and Query Folders"](#) for more information.

8.4.1.4 My Folders

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

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

See [Section 10.20, "Working with Your Personal Folders"](#) for more information.

Note: The My Folders node is available only if you are connecting to an Oracle WebCenter Content Server 11gR1 instance running the Desktop and Framework Folders 11gR1 components at least at the 11.1.1.6 level.

8.4.2 New Check-In

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

When you double-click a content profile (or select it and press Enter), you see a list of all content items on the server that were checked in using that profile. You will see

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

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

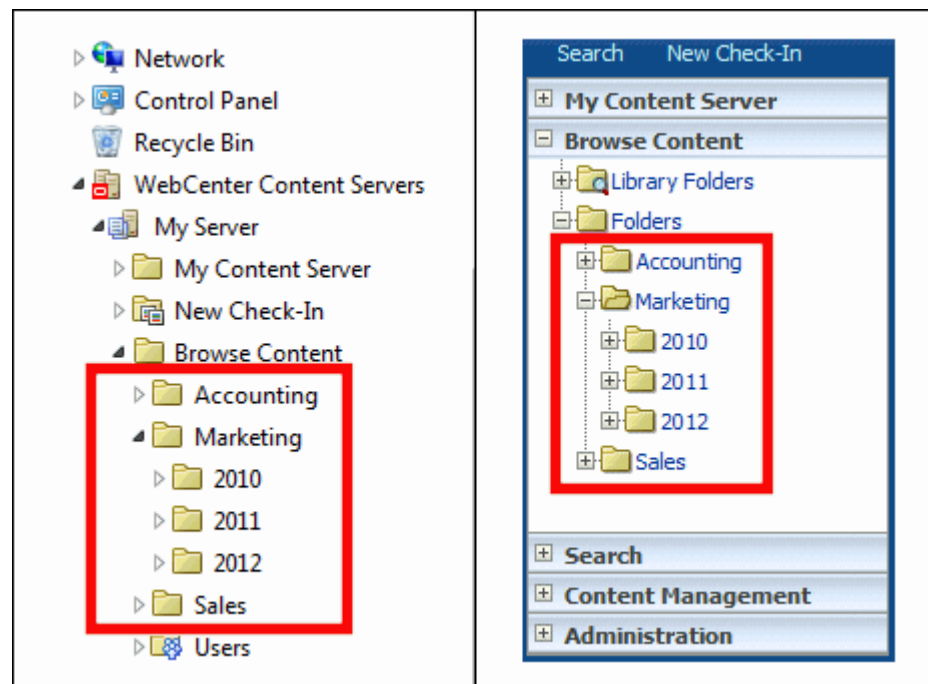
Note: The New Check-In node is available only if you are connecting to an Oracle WebCenter Content Server 11gR1 instance running the Desktop 11gR1 component at least at the 11.1.1.6 level.

8.4.3 Browse Content

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

The content folders tree on an Oracle WebCenter Content Server instance enables you to work with content on that server using the familiar folders structure used in Windows Explorer and e-mail applications. The content folder structure in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'Browse Content'), as illustrated in [Figure 8-4](#). You only see folders and files for which you were assigned access privileges on the server.

Figure 8-4 Content Folders in Windows Explorer and Oracle WebCenter Content Server's Web Interface



For more information about using content folders and the files in them, see [Chapter 10, "Working with Managed Content Files in Windows Explorer."](#)

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

The icons of managed files in a content folder show their associated applications (for example, Microsoft Word for .doc or .docx files) as well as their content management status (in the form of application icon overlays), if applicable. For more information, see [Section 9.7, "Content File Status."](#)

If an object is selected in the content pane, the preview pane shows information about that object from the content server (for example, the content information page for files).

Depending on the content server configuration (specifically, the folders component that is running), there may also be a Users folder under Browse Content. This folder contains the personal folders for all authenticated users on the server, but you only see your own personal folder (unless you have administrative server privileges). Your personal folders tree under Users is identical to the one under My Folders (see [Section 8.4.1.4, "My Folders"](#)).

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

8.4.4 Offline Files

If a content server is in offline mode, its integration hierarchy includes a node called Offline Files, which lists all files on that server that are in offline mode, including those that are not in a content folder. You can interact with these files directly from the list. For more information, see [Chapter 14, "Working with Offline Content."](#)

8.4.5 Search Results

The Search Results folder in the integration hierarchy of an Oracle WebCenter Content Server instance lists all files on that server that meet the criteria of the search query that was most recently performed. You only see files for which you were assigned access privileges on the server. You can interact with content items in the search results list just as you could any other content item on the server. For example, you can conveniently open, view, check out, and check in content items in the folder (see [Chapter 10, "Working with Managed Content Files in Windows Explorer"](#)). You can also view the content information page and make changes to the assigned metadata, if necessary.

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

You can save your most recent search query by right-clicking the Search Results node in the integration hierarchy and choosing **Save Query**. This adds the query to the My

Saved Queries list (see [Section 8.4.1.3, "My Saved Queries"](#)), where you can easily run the query again. You can also drag and drop the Search Results node (while holding the Ctrl key) to My Saved Queries or to a content folder under Browse Content to create a dynamic query folder (see [Section 10.4, "Working with Saved Search Queries and Query Folders"](#)).

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

8.5 Oracle Content Database Repositories

The Desktop client software provides direct access to content on Oracle Content Database (Oracle Content DB) servers. This server type is represented in the integration hierarchy using the icon shown in [Figure 8-5](#).

Figure 8-5 Icon for Oracle Content Database (Oracle Content DB)



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

8.6 WebDAV Server Repositories

In addition to Oracle WebCenter Content Server and Oracle Content Database repositories, the Desktop client software provides direct access to files on any content server that supports the standardized Web Distributed Authoring And Versioning (WebDAV) enhancements to the HTTP protocol. (Please note that the WebDAV DeltaV extension is not supported.) This server type is represented in the integration hierarchy using the icon shown in [Figure 8-6](#).

Figure 8-6 Icon 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 on the server.

Understanding Content Folders and Files

This section covers these topics:

- [Section 9.1, "About Content Folders and Files"](#)
- [Section 9.2, "Content Folder Metadata Inheritance and Propagation"](#)
- [Section 9.3, "Content File Versioning"](#)
- [Section 9.4, "Content File Metadata"](#)
- [Section 9.5, "Local Caching of Content Files"](#)
- [Section 9.6, "Content Management Actions on Files"](#)
- [Section 9.7, "Content File Status"](#)
- [Section 9.8, "Content Folder Context Menus"](#)
- [Section 9.9, "Content File Context Menus"](#)
- [Section 9.10, "Enabling Metadata Prompting for Content Folders"](#)

9.1 About Content Folders and Files

Content folders offer a familiar, tree-like structure that provides convenient access to files on a content server without having to use that server's own user interface (web-based or otherwise). They are essentially like the directories on your local computer, but they point to virtual locations on the content server. Similarly, the "files" in the content folders are symbolic links or pointers to content items in the content server repository.

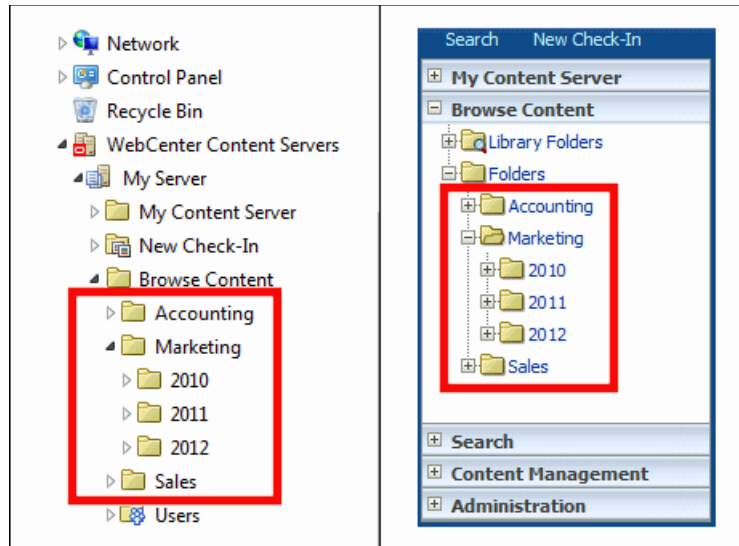
Oracle WebCenter Content Server

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

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

The folder structure that you see in the integration hierarchy is identical to that in the Oracle WebCenter Content Server web interface (under 'Browse Content'), as illustrated in [Figure 9-1](#). You only see folders and files for which you have access privileges on the server.

Figure 9-1 Content Folders in Windows Explorer and Oracle WebCenter Content Server's Web Interface



Oracle Content Database Servers and Other WebDAV Servers

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

Interacting with Content Folders and Files

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

9.2 Content Folder Metadata Inheritance and Propagation

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

The content server administrator can enable the metadata propagation feature, which enables you to apply a parent folder's metadata to all the subfolders and files in it. See [Section 10.17, "Propagating Folder Metadata"](#) for more information.

9.3 Content File Versioning

Oracle WebCenter Content Server

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

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

The file name that is displayed in the Name column in Windows Explorer or your 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 WebCenter Content Server is set up to automatically generate content IDs, then the content IDs follow the established numbering convention for that server. If this option is not enabled, checking in a new content item generates a unique sequential content or message ID.

Oracle Content Database Servers

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

Other WebDAV Servers

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

9.4 Content File Metadata

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

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

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

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

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

Desktop can "remember" the metadata values used at check-in and automatically populate metadata fields each time you check in a new content item. For more information, see [Section 7.13, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

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

1. **Folder:** When you add a file to a content folder on the server, that file inherits any default metadata values for the folder that have been set through Oracle WebCenter Content Server's web interface.
2. **User:** For any metadata defaults not set for the folder, the user's default metadata values (as set in the user profile) are applied.
3. **System:** The system default values are applied to any fields that are not set by either the folder metadata or the user's default metadata.
4. **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 item on its content information page (see [Section 10.12, "Viewing and Modifying Content Folder and File Properties"](#)).

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

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

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

9.5 Local Caching of Content Files

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

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

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

The following files are stored in your local cache:

- copies of files that you checked out of the content server,
- read-only copies of files on the content server that you specifically marked to be available offline (so that you can access these files even if there is no connection to the server),
- modified files managed by a content server that you have not yet checked back in to that server (typically checked-out files that were edited), 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. For more information, see [Section B.2, "Changing the Location of the Local File Cache."](#)

9.6 Content Management Actions on Files

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

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

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

For more information, see [Section 10.8, "Viewing Content Files."](#)

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

changes to the file as required. When you check the file back in to the content server, it is checked in as a new revision of the existing content item. In Microsoft Office applications, you are given the opportunity to do this when you close the document or exit the application; other file types must be checked in using Windows Explorer. For more information, see [Section 10.9, "Opening Content Files."](#) (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. For more information, see [Section 10.10, "Checking Out Content Files."](#)

When you check in a file to a content server, it is uploaded and submitted to the content server. You can check in files as new revisions of content items already on the server, or new files as new content items. Once you check a file in to a server, it is stored on that server and other users have access to it in accordance with their assigned privileges. For more information, see [Section 10.11, "Checking In Content Files."](#)

- **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. For more information, see [Section 14, "Working with Offline Content."](#)

[Table 9–1](#) below provides a side-by-side comparison between these content management actions on files on a server.

Table 9–1 Content File Actions

Action	Checked Out of Content Server?	Available in Offline Cache ⁽¹⁾ ?	Opened in Associated Application?
View	No	No ⁽³⁾	Yes ⁽⁴⁾
Open ⁽²⁾	Yes ⁽⁵⁾	Yes	Yes ⁽⁶⁾ ⁽⁷⁾
Check Out	Yes ⁽⁵⁾	Yes	No
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. For more information, see [Section 9.5, "Local Caching of Content Files."](#)
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. In Microsoft Office applications, you may be able to check it out directly depending on the file type and state, so you can make changes and check it back in to the server as a new revision.

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

9.7 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 9–2 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 9–2 for an example of a Word application icon with a checked-out status overlay).

Figure 9–2 *Checked-out Microsoft Word Document*



Table 9–2 *Status Icons for Content Items*







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

Table 9–2 (Cont.) Status Icons for Content Items

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

9.8 Content Folder Context Menus

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

- **New Folder:** Enables you to create a new content subfolder in the current folder.
- **New Project:** Enables you to create a new collaboration subproject in the current project.
- **Open:** Opens the selected folder in a new window, with the folders pane not visible (when selected in folders pane), or opens the selected folder in the content pane (when selected in the content pane).
- **Make Content Available Offline:** Creates local copies of all content in the selected content folder or collaboration project in a special cache location on your computer. You can then view these files (in read-only mode) even if you are not connected to the content server. For more information, see [Section 14.2, "Making Folders and Files Available Offline."](#)

- **Refresh Offline Content:** Updates the offline file cache on your local computer to reflect the latest content of the corresponding content folder(s) or collaboration project(s) on the content server. For more information, see [Section 14.4, "Refreshing Offline Content."](#)
- **Remove Offline Content:** Deletes the content in the selected collaboration folder or collaboration project from the offline file cache on your local computer (not from the content server!). This means you can no longer view these files when you are not connected to the content server. For more information, see [Section 14.5, "Removing Offline Content."](#)
- **Search...** (Oracle WebCenter Content Server only): Opens a search form on the current content server where you can specify criteria and search for items on that server based on these criteria. For more information, see [Section 10.3, "Searching for Content Files."](#)
- **Show Quick Search** (Oracle WebCenter Content Server only): Shows or hides the Quick Search feature in Windows Explorer. For more information, see [Section 3.9, "Quick Search Integration."](#)
- **Show Only Published Content** (Oracle WebCenter Content Server only): Includes or excludes from the file list all content items that are in an unreleased state on the content server; that is, any content items that are currently in a workflow, have not yet been fully converted or indexed, or have a future release date. For more information, see [Section 10.18, "Showing or Hiding Unpublished Content Files."](#)
- **Propagate** (Oracle WebCenter Content Server only): Copies the metadata of the selected content folder or collaboration project to all subfolders and files in that folder or project. For more information, see [Section 10.17, "Propagating Folder Metadata."](#)
- **Copy:** Copies the selected content folder or collaboration project and all its content into the copy-and-paste buffer. You can then create a copy of the folder(s) or project(s) by pasting them to a different location. (You can also press the **Ctrl+C** key combination to do this.) For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location. (You can also press the **Ctrl+V** key combination to do this.)
- **Create Shortcut** (Oracle WebCenter Content Server only): Creates a shortcut to the selected content folder or collaboration project at the same folder or project level in the integration hierarchy. For more information, see [Section 10.19, "Working with Shortcuts to Content Folders and Files."](#)
- **Delete:** Removes the selected content folder or collaboration project, including all its content, from the integration hierarchy (and also from the content server!). (You can also press the Delete key to do this.) *You should use this option with great care as it may directly affect files on the content server.* For more information, see [Section 10.16, "Deleting Content Folders and Files."](#)
- **Rename:** Enables you to give the selected content folder or collaboration project in the integration hierarchy a new name. (You can also press the **F2** key to do this.) For more information, see [Section 10.13, "Renaming Content Folders and Files."](#)
- **Content Information...** (Oracle WebCenter Content Server only): Displays the content information page on the server for the selected folder or project in the integration hierarchy. For more information, see [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files."](#)

- **Properties:** Displays a dialog that provides information about the selected folder or project in the integration hierarchy. For more information, see [Section 10.12.2, "Viewing and Modifying Properties of Folders or Files."](#)
- **Advanced Properties** (Oracle Content DB servers only): Displays a window that displays the properties about the selected folder in the integration hierarchy. For more information, see [Section 10.12.3, "Viewing and Modifying Advanced Properties of Folders or Files."](#)
- **Sharing** (Oracle Content DB servers only): Displays a window where you can set the properties for sharing the selected folder(s); in other words, who has access to the folder and who can create content in it. For more information, see [Section 10.12.4, "Viewing and Modifying Sharing Properties of Folders or Files."](#)
- **Update Metadata** (Oracle WebCenter Content Server only): This enables you to update the metadata that will be given to new content items in this folder. This will open either the Editing Default Metadata Values page or the Hierarchy Folder Configuration page, depending on which folder system is being used. For more information, see [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files."](#)

9.9 Content File Context Menus

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

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

- **Open:** Opens the selected file in its associated application in full edit mode; that is, it is checked out of the content server, and if you make any changes, you can check it in as a new revision of the content item. For more information, see [Section 10.9, "Opening Content Files."](#)
- **View File From Server:** Downloads the latest released revision of the selected file from the content server to your local cache and opens it in its associated application in read-only mode. The file is not checked out and if you make any changes, you must check it in as a new content item. For more information, see [Section 10.8, "Viewing Content Files."](#)
- **View:** Opens the selected file from your local cache in its associated application in read-only mode. Its associated content item on the server is not checked out and if you make any changes to the file, you must check it in as a new content item. This option is available only if a file is in your local cache. For more information, see [Section 10.8, "Viewing Content Files"](#) and [Section 9.5, "Local Caching of Content Files."](#)
- **Open With...:** Allows you to choose the application with which to open the selected file (rather than the application associated with the file type). A submenu provides all available applications. This option is available only for files that are already checked out of the content server. For more information, see [Section 10.9, "Opening Content Files."](#)

- **Check Out:** Retrieves the selected file from the content server and makes it available for further processing (for example, editing). For more information, see [Section 10.10, "Checking Out Content Files."](#)
- **Check In:** Uploads the selected file to the content server and stores it on that server. If it is a new content item, you must provide metadata. If it is an existing content item, it inherits the metadata from the previous revision. For more information, see [Section 10.11, "Checking In Content Files."](#)
- **Check In With Metadata:** Allows you to modify the metadata of a managed file before uploading it to the content server as a new revision. For more information, see [Section 10.11, "Checking In Content Files."](#)
- **Undo Check Out:** Cancels the checked-out status of the selected file on the content server. For more information, see [Section 10.10.3, "Undoing a File Check-Out."](#)
- **Discard Changes:** Moves the locally cached copy of a content item to the recycle bin, effectively deleting it (unless the cache directory is located on a network share; in that case it is deleted directly). This option is available if there is a conflict between the locally cached file copy and the original file on the content server.
- **Move to Desktop:** Moves the locally cached copy of a content item to the Windows desktop. This option is available if there is a conflict between the locally cached file copy and the original file on the content server. Moving the file to the desktop allows you to check out the original file and check in the file on your desktop.
- **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. For more information, see [Section 14, "Working with Offline Content."](#)
- **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. For more information, see [Chapter 13, "Working with Managed Content in Workflows."](#)
- **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. For more information, see [Chapter 13, "Working with Managed Content in Workflows."](#)
- **Copy:** Copies the selected file from the local cache into the copy-and-paste buffer. You can then create a copy of this file by pasting it to a different location. (You can also press the **Ctrl+C** key combination to do this.) This option is available only if a file is in your local cache. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- **Copy File From Server:** Copies the latest released revision of the selected file on the server into the copy-and-paste buffer (rather than from your local cache). You can then create a copy of this file by pasting it into a different location. (You can also press the **Ctrl+C** key combination to do this.) For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- **Paste:** Pastes the contents of the copy-and-paste buffer into the current location.
- **Copy Links:** Copies the various URLs of the selected file in the integration hierarchy into the copy-and-paste buffer. You can then paste these URLs into any Windows application (for example, an e-mail message) to provide direct links to the file. For more information, see [Section 10.19.6, "Copying Content File Links."](#)

- **Create Shortcut** (Oracle WebCenter Content Server only): Creates a shortcut to the selected file in the same integration hierarchy folder as the referenced file. For more information, see [Section 10.19, "Working with Shortcuts to Content Folders and Files."](#)
- **Delete:** Removes the selected file from the integration hierarchy (and also from the content server!). (You can also press the Delete key to do this.) *You should use this option with great care as it may directly affect files on the content server.* For more information, see [Section 10.16, "Deleting Content Folders and Files."](#)
- **Rename:** Enables you to give the selected file in the integration hierarchy a new name. (You can also press the F2 key to do this.) Please note that this option is not available when the file is currently checked out of the content server. For more information, see [Section 10.13, "Renaming Content Folders and Files."](#)
- **Content Information...** (Oracle WebCenter Content Server only): Displays the content information page on the server for the selected file in the integration hierarchy. For more information, see [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files."](#)
- **Properties:** Displays a dialog that provides information about the selected file in the integration hierarchy. For more information, see [Section 10.12.2, "Viewing and Modifying Properties of Folders or Files."](#)
- **Advanced Properties** (Oracle Content DB servers only): Displays a window that displays the properties about the selected file in the integration hierarchy. For more information, see [Section 10.12.3, "Viewing and Modifying Advanced Properties of Folders or Files."](#)
- **Sharing** (Oracle Content DB servers only): Displays a window where you can set the properties for sharing the selected file; in other words, who has access to the file. For more information, see [Section 10.12.4, "Viewing and Modifying Sharing Properties of Folders or Files."](#)
- **Update Metadata** (Oracle WebCenter Content Server only): This enables you to update the metadata for a content item. For more information, see [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files."](#)

9.10 Enabling Metadata Prompting for Content Folders

When you drag and drop, copy and paste, or save a new file to a content folder on an Oracle WebCenter Content Server 11gR1 instance, you may be asked to provide metadata for that file before it is checked in to the server. This only happens if the content 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 the 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. For more information on metadata inheritance, see [Section 9.4, "Content File Metadata."](#)

To enable metadata prompting for a content folder on Oracle WebCenter Content Server 11gR1:

1. Open Windows Explorer and make sure the folders pane is visible.
2. Open the **WebCenter Content Servers** node.

3. Click the Oracle WebCenter Content Server 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 [Section 3.13.2, "Showing or Hiding the Preview Pane"](#)). 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 metadata that is assigned to the selected folder on the content server (for example, its owner, content type, security group, and so on).
See the *Oracle WebCenter Content User's Guide for Content Server* for more information on content information (metadata).
7. Depending on the folders configuration on the server, do either of the following:
 - Open the **Folder Actions** menu and then choose **Update** to open the Hierarchy Folder Configuration page (see [Section A.8, "Folder Information page"](#)).
 - Open the **Edit** menu, then click **Folder Information**, and then **show advanced options**.

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

8. Make sure that the **Prompt for Metadata** or **Enable Metadata Prompts** check box is selected.
9. When you are done, click **Save** or **Submit Update** to save the changes. The changes take effect immediately; you do not need to restart your computer or the content server.

Working with Managed Content Files in Windows Explorer

This section covers these topics:

- [Section 10.1, "About Windows Explorer Integration"](#)
- [Section 10.2, "Creating Content Folders"](#)
- [Section 10.3, "Searching for Content Files"](#)
- [Section 10.4, "Working with Saved Search Queries and Query Folders"](#)
- [Section 10.5, "Browsing to Content Files"](#)
- [Section 10.6, "Creating New Content Files"](#)
- [Section 10.7, "Modifying Existing Content Files"](#)
- [Section 10.8, "Viewing Content Files"](#)
- [Section 10.9, "Opening Content Files"](#)
- [Section 10.10, "Checking Out Content Files"](#)
- [Section 10.11, "Checking In Content Files"](#)
- [Section 10.12, "Viewing and Modifying Content Folder and File Properties"](#)
- [Section 10.13, "Renaming Content Folders and Files"](#)
- [Section 10.14, "Copying Content Folders and Files"](#)
- [Section 10.15, "Moving Content Folders and Files"](#)
- [Section 10.16, "Deleting Content Folders and Files"](#)
- [Section 10.17, "Propagating Folder Metadata"](#)
- [Section 10.18, "Showing or Hiding Unpublished Content Files"](#)
- [Section 10.19, "Working with Shortcuts to Content Folders and Files"](#)
- [Section 10.20, "Working with Your Personal Folders"](#)

10.1 About Windows Explorer Integration

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

interact with content servers and the files on them using a folders tree in Windows Explorer.

See [Chapter 3, "Integration into Windows Explorer"](#) for details on how the Desktop client software integrates with the Windows Explorer interface.

See [Chapter 9, "Understanding Content Folders and Files"](#) for general information about content folders and files.

10.2 Creating Content Folders

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

To add content folders to the integration hierarchy:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 3.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server on which you want to create a new content folder. If prompted, log in by entering your user name and password for that server.
4. Browse to the location in the integration hierarchy where you want to add the new content folder. (For Oracle WebCenter Content Server instances, you can add folders only under **Browse Content**).
5. Move the mouse cursor to an unused area in the content pane (that is, away from any of the items listed in it), right-click, and choose **New Folder**. Alternatively, you can open the **File** menu and choose **New Folder**.
6. Provide the name of the new folder and press Enter.
7. The new folder is created, and its folder information page opens in the preview pane. If you do not see this pane, you can turn it on (see [Section 3.13.2, "Showing or Hiding the Preview Pane"](#)).

Considerations

- When you add a new content folder, default metadata and settings are applied to that folder as defined by the content server administrator. You can change the default metadata for the folder while adding the new folder, or any time after you add it. For more information, see [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files."](#)
- When you add files to the new folder, they inherit default metadata from the folder.

10.3 Searching for Content Files

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

- [Section 10.3.1, "Searching for Files from a Server Integration Hierarchy"](#)
- [Section 10.3.2, "Searching for Files Using the Quick Search Feature"](#)
- [Section 10.3.3, "Searching for Files Using the Toolbar"](#)
- [Section 10.3.4, "Searching for Files from a Web Browser"](#)

Note: You cannot search Oracle Content DB servers or other WebDAV servers. You must browse to files on these servers to select them. See [Section 10.5, "Browsing to Content Files."](#)

10.3.1 Searching for Files from a Server Integration Hierarchy

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

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 3.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Move to anywhere in the integration hierarchy of the server whose content you want to search. If prompted, log in by entering your user name and password for that server. This will search the entire content server. If you want to limit your search to a particular folder and, potentially, its subfolders, then select that folder in the folders tree under Browse Content.
4. Right-click and choose **Search...** in the context menu. Alternatively, you can open the **File** menu and choose the **Search...** option. On Windows XP, you can also choose the search icon in the toolbar.

The Content Query Capture dialog opens (see [Section A.18, "Content Query Capture Dialog"](#)). This screen is basically the standard Oracle WebCenter Content Server search form.

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

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

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

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 10.4, "Working with Saved Search Queries and Query Folders."](#)

10.3.2 Searching for Files Using the Quick Search Feature

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

1. Open Windows Explorer.

2. Open the **WebCenter Content Servers** node.
3. Move to anywhere in the integration hierarchy for the server whose content you want to search. If prompted, log in by entering your user name and password for that server.
4. Make sure the Quick Search panel is visible. If this is not the case, right-click and choose **Show Quick Search** in the context menu.
5. Enter the search criteria in the Quick Search field and press Enter or click the search icon to the right of the text entry field.

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

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 10.4, "Working with Saved Search Queries and Query Folders."](#)

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

Note: For more information about the Quick Search feature in Windows Explorer, see [Section 3.9, "Quick Search Integration."](#)

10.3.3 Searching for Files Using the Toolbar

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

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Move to anywhere in the integration hierarchy for the server whose content you want to search. If prompted, log in by entering your user name and password for that server. This will search the entire content server. If you want to limit your search to a particular folder and, potentially, its subfolders, then select that folder in the folders tree under Browse Content.
4. Make sure the Standard Buttons toolbar is visible. If this is not the case, choose **View**, then **Toolbars**, and then **Standard Buttons**.
5. Click the Search icon in the toolbar ([Figure 10-1](#)).

Figure 10-1 Search Icon



The Content Query Capture dialog opens (see [Section A.18, "Content Query Capture Dialog"](#)). This screen is basically the standard Oracle WebCenter Content Server search form.

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

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

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

The files are also listed in the Search Results node in the integration hierarchy of the server. You can quickly call up these search results again until you perform another query. You can also save the query for future use. See [Section 10.4, "Working with Saved Search Queries and Query Folders."](#)

10.3.4 Searching for Files from a Web Browser

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

See [Section 6.2, "Adding the Oracle WebCenter Content Search Provider in Your Web Browser"](#) for instructions on how to set up your web browser and [Section 6.4, "Searching for Managed Content in Your Web Browser"](#) for information on how to search for content items from your web browser.

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

10.4 Working with Saved Search Queries and Query Folders

When you perform a search query, the **Search Results** node in the integration hierarchy shows all content items on the server that meet the search criteria and for which you have access privileges on the server. If you want, you can save the most recent search query so you can easily run it again at a later time. To save the most recent search query, right-click the Search Results folder and choose **Save Query**. Enter a name for the query and click **OK** (or press Enter) to save it to **My Saved Queries** under My Content Server. See [Section 8.4.1.3, "My Saved Queries"](#) for further details.

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

You can also drag and drop the most recent search results (while holding the Ctrl key) or a saved query to anywhere within the content folders tree under Browse Content. This creates a **query folder**, which you can open to run the associated search query on the server. If you drag and drop a saved query, the default query folder name is the same name as the original saved query with 'Copy of' preceding it. If you drag and drop the search results, the default query folder name is 'Search Results'. You can rename query folders in the same way as other folders (see [Section 10.13, "Renaming Content Folders and Files"](#)). Query folders are marked in the integration hierarchy by a special icon ([Figure 10–2](#)).

Figure 10–2 Query Folder Icon



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

It is important to note that saved query lists or query folders only show content items that meet the search criteria, not shortcuts to content items or folder names, even if these meet the search criteria. Also, the items in saved query lists or query folders are the actual files, not copies or pointers of some sort. If you delete a file from the search results list, you are removing the actual content item from the server.

10.5 Browsing to Content Files

In addition to searching for files (see [Section 10.3, "Searching for Content Files"](#)), you can also browse to a file on a content server and select it for further use. When browsing to a file, you navigate to it by moving down a tree structure of folders on the server until you have located the file you want to work with.

To browse to a content file on a server:

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 3.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
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. 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.

10.6 Creating New Content Files

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

- Copy and paste a file from your local computer to a content folder or profile on a server. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- Drag and drop a file from your local computer to a content folder or profile on a server. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- Move a file from your local computer to a content folder or profile on a server. For more information, see [Section 10.15, "Moving Content Folders and Files."](#)
- Double-click an existing, unmanaged Office document on your local computer to open it in its associated Office application (for example, Word for .doc or .docx files), and then check it in to a server using the **Save As New** option in the WebCenter Content menu or ribbon. For more information, see [Section 11.7, "Creating and Checking In a New Managed Document."](#)

If the target folder on the content server already contains a file of the same name as the file being copied or moved into that folder, then it is not checked into the server as a new content item. On Oracle WebCenter Content Server instances, the file is checked in as a new revision of the existing file (even though they may be completely different files). On Oracle Content Database servers and other WebDAV servers, the existing file in the folder is typically overwritten with the new file. For more information, see [Section 9.3, "Content File Versioning."](#)

10.7 Modifying Existing Content Files

If you want to modify an existing content file (that is, a file that is already managed on a content server), you must first check it out of the server. A copy of the content file is then downloaded from the content server and placed in temporary storage space on your computer (see [Section 9.5, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). For more information, see [Section 10.10, "Checking Out Content Files."](#) After you have checked out a file, you can modify it as needed, and check it back in to the server when you are done. See [Section 10.11, "Checking In Content Files."](#)

If you want to modify a managed Office document, you can open that document in its associated Office application. It is then automatically checked out of the content server. After editing the document, you can check it back in directly from the Office application (see [Section 11.8, "Saving and Checking In an Existing Managed Document"](#)) or from Windows Explorer (see [Section 10.11, "Checking In Content Files"](#)).

Please note that 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. For more information, see [Section 12.9, "Opening Checked-In E-mail Messages."](#)

10.8 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 downloaded to your computer (see [Section 9.5, "Local Caching of Content Files"](#)). The file opens in its associated application in read-only

mode. You can make changes to the file in the application, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item.

Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 9.6, "Content Management Actions on Files."](#)

To view a content item in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to view. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to view. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **View File From Server** or double-click the file to open the file in its associated application in read-only mode. If the file is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), the context menu also includes a **View** option. You can then choose which file version to open: the cached, typically newer version (**View**) or the latest released version on the server (**View File From Server**). If you view the file from the server, the locally cached file version is left untouched and remains available, for example through the Offline Content Manager (see [Section 14.7, "Using the Offline Content Manager"](#)).

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

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

10.9 Opening Content Files

When you open a content file on a server, it is checked out of the content server and a copy is placed in temporary storage space on your computer (see [Section 9.5, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out"). The file opens in its associated application in full edit mode. You can make changes to the file in the application as required and check it back in to the server as a new revision of the content item (see [Section 10.11, "Checking In Content Files"](#)).

If you open a managed Office document in its associated Office application, it is automatically checked out of the content server. After editing the document, you can check it back in directly from the Office application (see [Section 11.8, "Saving and Checking In an Existing Managed Document"](#)) or from Windows Explorer (see [Section 10.11, "Checking In Content Files"](#)).

Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 9.6, "Content Management Actions on Files."](#)

To open a content item in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to open. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to open. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Open** to open the file in its associated application in full edit mode. If the file is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.

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

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

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

10.10 Checking Out Content Files

When you check out a file from a content server, the file is downloaded from the server and a copy is placed in temporary storage space on your computer (see [Section 9.5, "Local Caching of Content Files"](#)). The file is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out").

If you check out a file in Windows Explorer, the checked-out file is not opened in its associated application. (This is how checking out a file is different from opening it.) You can process the file as desired, and check it back in to the server when you are ready (see [Section 10.11, "Checking In Content Files"](#)). As long as the file is checked out, its file icon shows the checked-out status by a green check mark overlay of the application icon ([Figure 10-3](#)).

Figure 10-3 *Checked-out MicrosoftWord Document*

Note: For a side-by-side comparison of viewing, opening, and checking out content files, see [Section 9.6, "Content Management Actions on Files."](#)

The following sections provide more information about checking out files:

- [Section 10.10.1, "Checking Out Files"](#)
- [Section 10.10.2, "Opening Checked-Out Files"](#)
- [Section 10.10.3, "Undoing a File Check-Out"](#)
- [Section 10.10.4, "Viewing All Your Checked-Out Files"](#)

10.10.1 Checking Out Files

To check out a file in Windows Explorer:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file you want to check out. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to check out. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Check Out**. Alternatively, open the **File** menu and choose **Check Out**. (These options are available only if the selected file is currently not checked out.)

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

10.10.2 Opening Checked-Out Files

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

To open checked-out files:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the checked-out file you want to open. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server you want to open. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)

5. Right-click and choose either of the following options:
 - **Open:** Opens the selected file in the application associated with its file type (for example, Microsoft Word for .doc and .docx files).
 - **Open With...:** Allows you to choose the application with which to open the selected file (rather than the application associated with the file type). The list of available applications is exactly the same as for other, unmanaged files of the same type on your computer. Using this option may be useful if, for example, you want to open a managed web or media file in an editor rather than a viewer, which is often the default application for these file types.

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

Once you are done editing the file, you can check it back in to the server. See [Section 10.11, "Checking In Content Files."](#)

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

10.10.3 Undoing a File Check-Out

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

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

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the file whose check-out you want to undo. If prompted, log in by entering your user name and password for that server.
4. Locate and select the content item on the server whose check-out you want to undo. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Undo Check Out**. Alternatively, open the **File** menu and choose **Undo Check Out**. (These options are available only if the selected file is currently checked out.)

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

10.10.4 Viewing All Your Checked-Out Files

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

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

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

1. Open Windows Explorer and make sure the navigation pane is visible (see [Section 3.13.1, "Showing or Hiding the Navigation Pane"](#)).
2. Open the **WebCenter Content Servers** node.
3. Click the server for which you want to see all your checked-out files. If prompted, log in by entering your user name and password for that server.
4. Open the **My Content Server** node and then click **My Checked-Out Content**. (If the server does not have a node called My Checked-Out Content, then it is not a Content Server 11g instance.)

The content pane lists all files that you have currently checked out on the current content server. Please note that all items show a green check mark in their icons to indicate their checked-out status ([Figure 10-4](#)). Also, you see only files that you checked out yourself, not other users' checked-out files.

Figure 10-4 Word Document Checked Out By Yourself



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

10.11 Checking In Content Files

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

If you check a currently checked-out file back in to an Oracle WebCenter Content Server instance, this file is checked in as a new revision of the existing content item. On Oracle Content Database servers and other WebDAV servers, the file that is checked in will typically overwrite the existing file on the server. See [Section 9.3, "Content File Versioning"](#) for more information.

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

Note: For more information on checking in e-mail messages and their attachments, see [Section 12.5, "Checking In E-mail."](#) For details on checking in Microsoft Office documents from within Office applications, see [Section 11.8, "Saving and Checking In an Existing Managed Document."](#)

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

Checking In Previously Checked-Out Files

To check in a file that was previously checked out (see [Section 10.10.1, "Checking Out Files"](#)):

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Locate and select the content item on the server that you want to check in to the server. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#) All files that you checked out yourself have a green check mark in their file icons. You can see a list of all files that you have currently checked out of an Oracle WebCenter Content Server instance by opening the My Content Server node and then clicking **My Checked-Out Content**. You can check files in to the server directly from that list.
4. Right-click and choose **Check In**. Alternatively, open the **File** menu and choose **Check In**. (These options are available only if the selected file is currently checked out.)

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

Note: You can also check a currently checked-out file back in to the server using the Offline Content Manager. See [Section 14.7, "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 content folder or profile on a server. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- By dragging and dropping a file to a content folder or profile on a server. For more information, see [Section 10.14, "Copying Content Folders and Files."](#)
- By moving a file to a content folder or profile on a server. For more information, see [Section 10.15, "Moving Content Folders and Files."](#)

Considerations

- When you check in an existing file on an Oracle WebCenter Content Server instance, it is checked in as a new revision of the existing content item. You can see the revision history of a file on its content information page on the server.
- When a file is copied or moved to a 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 with the same name. Otherwise, the file is checked in as a new revision of the existing file (even though they may be completely different files). For more information, see [Section 9.3, "Content File Versioning."](#)
- If you want to check in a new content item, but do not want to assign it to a content folder, then you can drag-and-drop or copy-and-paste it into any of the content profiles under **New Check-In**. This opens the Check In Content dialog, where you can provide profile-specific metadata before check-in (see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#)).

- When you check in a local copy of a managed file (for example, one that was e-mailed to you), you may see a warning that it is not currently checked out and that the file has been changed on the server (that is, there is a newer revision on the server). You can then choose to open the current file or the latest revision from the server.
- When you drag and drop or copy and paste a new file into a content folder on an Oracle WebCenter Content Server instance, you may be asked to provide metadata for the file, depending on the settings for that content folder (see [Section 9.10, "Enabling Metadata Prompting for Content Folders"](#)). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the content folder (see [Section 9.4, "Content File Metadata"](#)).
- If Oracle WebCenter Content: Records is installed on Oracle WebCenter Content Server with its DoD compliance features enabled, then you may not be able to check in files by copying and pasting or dragging and dropping them into content folders. This is because the DoD compliance features make the Category or Folder field required, which means an item cannot be checked in if this field is empty. Since copying and pasting or dragging and dropping a file into a content folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured Records to enable such check-ins.

10.12 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:

- [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files"](#)
- [Section 10.12.2, "Viewing and Modifying Properties of Folders or Files"](#)
- [Section 10.12.3, "Viewing and Modifying Advanced Properties of Folders or Files"](#)
- [Section 10.12.4, "Viewing and Modifying Sharing Properties of Folders or Files"](#)

10.12.1 Viewing and Modifying Folder and Content Information of Folders or Files

You can view the folder and content information of folders and files on an Oracle WebCenter Content Server instance. This enables you to see their assigned metadata and other content management properties (and modify them, if required). 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 a WebCenter Content Server 11g instance.

To view and change the folder or content information of a folder or file on an Oracle WebCenter Content Server instance:

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

3. Open the server that stores the folder or file whose content information you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file whose content information you want to view or modify.

See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)

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

- View in the preview pane.

See [Section 3.13.2, "Showing or Hiding the Preview Pane."](#)

- View in the information page.

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

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, and security group).

Depending on which folders configuration is used on the server, you will see either a folder information page that shows the metadata assigned to that folder, or the metadata that will be assigned to content added to that folder.

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

The bar at the top of the information page shows the available actions for the content folder and file.

6. Modify the information or metadata in one of the following ways:

- On the information page, open the **Folder Actions** menu (for folders) or the **Content Actions** menu (for files), then choose **Update**.
- Right-click the folder or file in the navigation pane or content pane, then choose **Update Metadata**.
- With the folder or file selected in the navigation pane or content pane, open the **File** menu, then choose **Update Metadata**.

The Update Metadata dialog is described in [Section A.9, "Update Metadata Dialog."](#)

7. 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.

10.12.2 Viewing and Modifying Properties of Folders or Files

To view some Windows properties of a content folder or file:

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

3. Open the server that stores the folder or file whose properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose properties you want to view or modify. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Properties**. Alternatively, open the **File** menu and choose **Properties**.

The Folder Properties dialog or Content Item Properties dialog opens. For more information, see [Section A.7, "Folder Properties Dialog"](#) and [Section A.17, "Content Item Properties Dialog."](#) These are basically standard Windows properties dialogs, with some added content management information.

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

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

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

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle Content Database server that stores the folder or file whose advanced properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose advanced properties you want to view or modify. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Advanced Properties**. Alternatively, open the **File** menu and choose **Advanced Properties**.

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

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

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

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle Content Database server that stores the folder or file whose sharing properties you want to view or modify. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server whose sharing properties you want to view or modify. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Sharing**. Alternatively, open the **File** menu and choose **Sharing**.

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

10.13 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

To rename a content folder or file from the integration hierarchy:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the server that stores the folder or file you want to rename. If prompted, log in by entering your user name and password for that server.
4. Locate and select the folder or file on the server you want to rename. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Rename** or press **F2** on your keyboard. Alternatively, open the **File** menu and choose **Rename**.
6. Provide the new name of the folder or file, and press Enter.

Renaming Folders and Files From the Properties Dialog

To rename a content folder or file from its properties dialog:

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

4. Locate and select the folder or file on the server you want to rename. See [Section 10.3, "Searching for Content Files"](#) or [Section 10.5, "Browsing to Content Files."](#)
5. Right-click and choose **Properties**. Alternatively, open the **File** menu and choose **Properties**.

The Folder Properties dialog or File Properties dialog opens. For more information, see [Section A.7, "Folder Properties Dialog"](#) and [Section A.17, "Content Item Properties Dialog."](#)

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

Renaming Folders on Their Information page

To rename a content folder from its information page:

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

4. Locate and select the folder on the server you want to rename.

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

5. Depending on the folders configuration on the server, do either of the following:
 - Open the **Folder Actions** menu and then choose **Update** to open the Hierarchy Folder Configuration page (see [Section A.8, "Folder Information page"](#)). (If the Folder Actions menu does not have an Update option, then you do not have sufficient privileges on the server to perform that action.)
 - Open the **Edit** menu and then click **Folder Information**.
6. Provide the new folder name in the **Folder Name** or **Virtual Folder Name** field.
7. When you are done, click **Save** or **Submit Update** to save the changes. The changes take effect immediately.

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 in the local cache (for example, because it is checked out of the content server). See [Section 9.5, "Local Caching of Content Files."](#)
- On Oracle WebCenter Content Server, the title of a content file may (initially) be based on its file name. If you change the file name in the integration hierarchy, its title is not automatically modified to reflect the new file name (or vice versa).
- If you rename a content folder or file, the names of any shortcuts to the folder or file are not updated automatically.

10.14 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** or **Copy File From Server**. Then, at the target location, right-click and choose **Paste**.
- Press **Ctrl+C** on your keyboard. Then, at the target location, press **Ctrl+V**.
- Choose **Copy** from the **Edit** menu. Then, at the target location, choose **Paste** from the **Edit** menu. (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.

Considerations

- If you want to drag and drop files to a content folder on the same server, make sure to hold the Ctrl key while doing it. Otherwise the content item will be moved rather than copied.
- You cannot copy a file to the same folder as it is in.
- The file name and title of the copied file are the same as for the original file, but you can, of course, change these afterwards. The copied file does have a different content ID as it is a separate content item on the server.
- If a file to be copied is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), the context menu includes both a **Copy** and **Copy File From Server** option. You can then choose which file version to copy: the cached, typically newer version (**Copy**) or the latest released version on the server (**Copy File From Server**).
- All other copy methods will copy the locally cached file version if it exists, and otherwise the latest released revision from the server.
- You cannot copy content files to query folders.
- If Oracle WebCenter Content: Records is installed on Oracle WebCenter Content Server with its DoD compliance features enabled, then you may not be able to check in files by copying and pasting or dragging and dropping them into content folders. This is because the DoD compliance features make the Category or Folder field required, which means an item cannot be checked in if this field is empty. Since copying and pasting or dragging and dropping a file into a content folder often does not require any further user intervention, the check-in cannot complete successfully unless the content server administrator configured Records to allow such check-ins.
- Use the menu copy-and-paste options (not keyboard commands) when copying items between Lotus Notes and Windows Explorer. Lotus Notes has an internal clipboard and data from that clipboard is retained when using keyboard copy-and-paste commands. For example, if you use the keyboard to copy a Lotus Notes memo to your clipboard, paste it into a folder on a content server, then copy a file from Windows Explorer and attempt to paste it into the same content server folder, the result is the previous Lotus Notes memo.
- See also [Section 10.19.4, "Copying Content Folder and File Shortcuts."](#)

Copying Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows 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 opens where you can provide metadata for the files before checking them in. For more information, see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)."](#)

Copy Sources and Targets

You can copy items between various sources and targets:

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

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

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

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

If you copied Microsoft Office documents, you may be able to check them back in to their originating Oracle WebCenter Content Server instance, even if they are in a location outside the integration hierarchy. This depends on how the content server is set up; specifically, whether the DesktopTag feature is enabled. If this is the case, the Microsoft Office documents contain embedded information about the server location where they originated. This enables these documents to be uploaded to that same server location. You check these documents in using the WebCenter Content menu or ribbon in the Office application. For more information, see [Section 4.6, "Microsoft Office Document Properties."](#)

- **Within the content folder structure of the same server:** When you copy a file from a content folder on a server in the integration hierarchy to a different folder on the same server, then a new content item is checked in to the server with a new content ID. This means that the server now stores two copies of the same file (in two different locations). 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 [Section A.8, "Folder Information page"](#)).

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

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

and extension already 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 WebCenter Content Server 11g instance and metadata prompting has been enabled for the folder (see [Section A.8, "Folder Information page"](#)). You are also prompted for metadata if any required metadata is missing regardless of the metadata prompting setting. The default metadata values in the check-in form will be the ones specified for the content folder that the file was copied into.

10.15 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.

Considerations

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

Moving Multiple Items

You can select multiple items (folders or files or a combination of both) using the standard methods in Windows and move them all at the same time. If multiple files are to be checked in to the content server as a result of the move action, a dialog may be displayed where you can provide metadata for the files before checking them in. This happens if the target server is an Oracle WebCenter Content Server 11g instance and metadata prompting has been enabled for the folder. You are also prompted for metadata if any required metadata is missing regardless of the metadata prompting setting. For more information, see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#).

Move Sources and Targets

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

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

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

Changing the Folder Location of Content Items

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

If you move a content item to a folder on the server that already contains a content item with the same file name, then you are prompted whether this new file should replace the existing file in the folder (similar to what happens when copying or moving files on your file system). If you confirm the action, the new content item takes the place of the old one in the content folder. It is not checked in as a new revision of the old content item. The old content item is not removed, though, it just loses its folder association (so it is not "overwritten" as files on your file system are). It is still on the content server and you can search for it. For example, imagine the content folder 'Sales' contains a content item named 'Report 2011.docx', which has four revisions, and the content folder 'Marketing' also contains a file with that same name, which has two revisions. If you move the file from the 'Sales' to the 'Marketing' folder and choose to replace that file, then the 'Marketing' folder will only contain the file moved from the 'Sales' folder, which still has four revisions. The original file in the 'Marketing' folder is no longer associated with that folder, but it is still on the content server (with two revisions).

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

10.16 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 content folder. If you delete one, all subfolders and all revisions of all content items in that folder may also be deleted, which may affect everyone who uses that content server.
- To delete a content item, you must have Delete permission for the security group of that content item.
- Depending on how the folders functionality has been set up on Oracle WebCenter Content Server, you may be prompted whether just the file entry should be removed from the content folder or also the actual content item from the server.
- When you delete a content folder or file, it may be permanently deleted or moved to a Trash folder, depending on the content server configuration (specifically, its folders component). See *Using Oracle WebCenter Content* for more information.
- To delete a content folder, you must be the owner of the folder or have Delete permission for the folder's security group, and you must have Delete permission for the security groups of all subfolders and content items within the folder.
- If you have permission to delete a content folder, the folder and all its contents will be deleted from the content server. If, during the delete process, the system encounters content that you do not have permission to delete, the delete process will end at that item, and the remainder of the content in the folder will be retained.
- You cannot delete the main nodes of an Oracle WebCenter Content Server instance (such as My Content Server, Browse Content, and so on).
- See also [Section 10.19.5, "Deleting Content Folder and File Shortcuts."](#)

10.17 Propagating Folder Metadata

You can copy the metadata of a content folder on an Oracle WebCenter 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. To propagate metadata to content items in a folder, you must have Write permission for the folder and the content items themselves. To propagate to any folders below the folder in the hierarchy, you must have Delete permission for the folders or be the author and have Write permission.

The content ID and title of items are always considered properties specific to those items and are never automatically propagated. Also, a 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 [Section A.8, "Folder Information page"](#)).

To propagate the metadata of a folder to all underlying folders and files:

1. Open Windows Explorer.
2. Open the **WebCenter Content Servers** node.
3. Open the Oracle WebCenter Content Server instance that stores the 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**.

6. If the content server is running Framework Folders, a dialog opens where you can specify which metadata fields and values you want to propagate before starting the process. Otherwise, all metadata fields and values are propagated.

The (selected) 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 [Section 10.12.1, "Viewing and Modifying Folder and Content Information of Folders or Files"](#)).

10.18 Showing or Hiding Unpublished Content Files

By default, *all* content items assigned to a folder on an Oracle WebCenter Content Server instance are displayed in the integration hierarchy regardless of their release state. This means the list may include unreleased (unpublished) files; that is, any content items on the server that are currently in a workflow, have not yet been fully converted or indexed, or have a future release date. Unreleased files are displayed in a different color in the content pane, typically green ([Figure 10-5](#)).

Figure 10-5 Unpublished Files



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

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

To change the list display:

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

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

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

10.19 Working with Shortcuts to Content Folders and Files

This section covers these topics:

- [Section 10.19.1, "About Content Folder and File Shortcuts"](#)
- [Section 10.19.2, "Creating Content Folder and File Shortcuts"](#)
- [Section 10.19.3, "Renaming Content Folder and File Shortcuts"](#)
- [Section 10.19.4, "Copying Content Folder and File Shortcuts"](#)
- [Section 10.19.5, "Deleting Content Folder and File Shortcuts"](#)
- [Section 10.19.6, "Copying Content File Links"](#)

10.19.1 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 WebCenter Content Server shortcuts
- standard Windows shortcuts

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

Oracle WebCenter Content Server Shortcuts

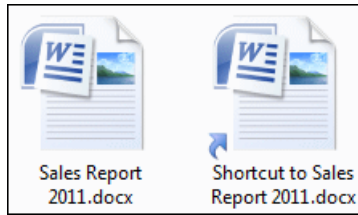
Unlike standard Windows shortcuts, Oracle WebCenter Content Server shortcuts are not link files (.lnk), but rather copies of the referenced file. As long as they reside in the integration hierarchy of a content server, they are tightly linked to the content folder or file they reference. Their context 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 [Section 9.7, "Content File Status"](#)). Please note that shortcuts to content items are never included in search results lists, even if these content items meet the search criteria.

When you create a shortcut to a content folder or file in the integration hierarchy, its name is the original folder or file name preceded by "Shortcut to," for example "Shortcut to Sales Report 2011.docx." In addition, the shortcut icon shows a small arrow symbol in the bottom left corner to indicate it is a reference to another item ([Figure 10-6](#)). (This link symbol is slightly different from standard Windows shortcuts, which visually reminds you this is a Desktop shortcut.)

The shortcut is placed in the same location as the original item: a shortcut to a file is in the same content folder as the file it references, and a shortcut to a folder is a folder at the same level as the original folder (preceded with "Shortcut to"). You can rename shortcuts as desired, and also copy them to other locations in the integration hierarchy of the same server or to a different server (see [Section 10.19.4, "Copying Content Folder and File Shortcuts"](#) below). Please note that if you copy the shortcut to a location outside the Oracle WebCenter 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 10–6 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 [Section 10.8, "Viewing Content Files"](#)).

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

Standard Windows Shortcuts

In addition to the special Oracle WebCenter Content Server shortcuts, you can also create standard Windows shortcuts to content 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.

10.19.2 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 WebCenter 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 WebCenter 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 WebCenter Content Servers 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.

10.19.3 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.

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

10.19.5 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.

10.19.6 Copying Content File Links

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

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

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

10.20 Working with Your Personal Folders

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

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

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

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

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

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

Working with Managed Documents in Microsoft Office

This section covers these topics:

- [Section 11.1, "About Microsoft Office Integration"](#)
- [Section 11.2, "Opening and Viewing an Existing Managed Document"](#)
- [Section 11.3, "Reopening a Recently Opened Managed Document"](#)
- [Section 11.4, "Checking Out a Managed Document in View Mode"](#)
- [Section 11.5, "Opening a Different Revision of a Managed Document"](#)
- [Section 11.6, "Refreshing a Managed Document"](#)
- [Section 11.7, "Creating and Checking In a New Managed Document"](#)
- [Section 11.8, "Saving and Checking In an Existing Managed Document"](#)
- [Section 11.9, "Turning an Unmanaged Document into a Managed Document"](#)
- [Section 11.10, "Turning a Managed Document into an Unmanaged Document"](#)
- [Section 11.11, "Inserting Managed Content into Office Documents"](#)
- [Section 11.12, "Comparing Managed Microsoft Word Documents"](#)

11.1 About Microsoft Office Integration

The Desktop client software enables you to interact with content servers and the files on them directly from Microsoft Word, Excel, and PowerPoint. You can perform a number of content management tasks, including opening Office documents from a content server ("check out"), saving documents to a server ("check in"), searching for documents on a server, comparing document revisions on a server, and inserting files on a server or links to these files into the current document.

See [Chapter 4, "Integration into Microsoft Office Applications"](#) for details on how the Desktop client software integrates with the Microsoft Office application interfaces.

See [Chapter 9, "Understanding Content Folders and Files"](#) for general information about content folders and files.

11.2 Opening and Viewing an Existing Managed Document

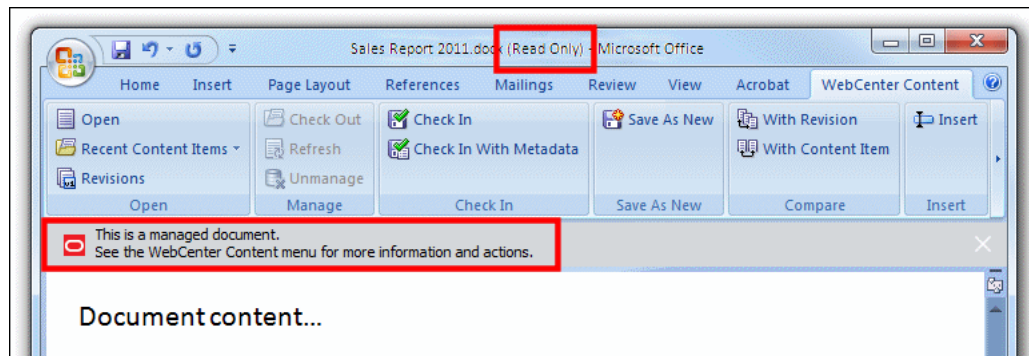
When you **open** an existing managed document on a content server in a Microsoft Office application, it is checked out of the server and the document opens in full edit mode. You can make changes to the document as required and when you save the

document, you can check it back in to the server as a new revision of the existing content item. While the document is checked out, it is locked on the content server, and no other user can check out the file until you either check it back in or cancel its checked-out status ("undo the check-out").

When you **view** an existing managed document on a content server in a Microsoft Office application, it is *not* checked out of the server and the document opens in read-only mode. You can make changes to the document, but you will have to save it as a new file (with a new file name) and check it in to the server as a new content item. If a document opens in view mode, you will see "(Read-Only)" following the file name in the application title bar (Figure 11-1).

Managed documents open in Microsoft Word, Excel, or PowerPoint with an information bar that provides content management details about the document (Figure 11-1). You can close this information bar by clicking the 'X' on the right.

Figure 11-1 Read-Only Indicator and Information Bar in Microsoft Word 2007



You can open or view a managed Microsoft Office document in different ways:

- [Within the Microsoft Office Application](#)
- [From Windows Explorer](#)

Within the Microsoft Office Application

You do not use the Microsoft Office application's standard file-open features to open or view a managed document. Instead, you go through the special WebCenter Content menu or ribbon:

1. Start Microsoft Word, PowerPoint, or Excel.
2. Open the **WebCenter Content** menu or ribbon, and then choose **Open**.
The Select Content dialog opens (see [Section A.10, "Select Content Dialog"](#)).
3. Select the **Edit** or **View** option in the bottom right corner of the dialog, depending on which edit mode you want for the document.
4. Browse to, or search for, the Office document on the server that you want to open, and select it. Make sure that you select a file that is compatible with the current Office application (for example, a word-processing document for Microsoft Word).
5. Click **OK**.

If the document is already in your local cache (typically because you checked it out and edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.

From Windows Explorer

You can also open or view a managed Microsoft Office document from Windows Explorer:

1. Browse to, or search for, the Office document on the content server that you want to open or view, and select it. Make sure that you select a file that is compatible with the Office application (for example, a word-processing document for Microsoft Word).
2. Right-click and choose **Open**, **View**, or **View File From Server** in the context menu:
 - **Open:** This checks out the selected file from the content server and opens the document in its associated Office application in full edit mode. If the document is already in your local cache (typically because you edited it earlier, but did not yet check it back in to the server), it opens from there; otherwise, the latest released revision on the content server opens.
 - **View:** This opens the selected document from your local cache in its associated Office application in read-only mode, but it does not check out the file from the server. This option is available only for documents that have been cached. See [Section 9.5, "Local Caching of Content Files."](#)
 - **View File From Server:** This opens the latest released revision of the selected document on the content server in read-only mode (as opposed to the locally cached version). This option is available only if the document is already in your local cache.

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

In addition to using the context menu or the **File** menu, you can also press Enter or double-click the selected item. By default, this will open the managed document in read-only mode ('view'), but you can change that to full edit mode ('open') (see [Section B.1, "Setting Windows Explorer Integration Options"](#)).

3. The managed document opens in its associated Microsoft Office application in the selected edit mode.

11.3 Reopening a Recently Opened Managed Document

Note: Managed documents do not appear in the Documents list on the Windows Start menu.

Desktop keeps a most recently used (MRU) list in Microsoft Office applications, so you can quickly and conveniently open managed documents on Oracle WebCenter Content Server that you worked on before.

The most recently opened file is at the top of the list. If you hover the mouse cursor over a list item in Office 2007 or 2010, you see the content ID of the file as well as the server it resides on. Tooltips are not provided in Office XP (2002) and 2003. You can configure the maximum number of items shown in the list. See [Section 4.5, "Most-Recently-Used \(MRU\) List"](#) for further details.

To reopen a managed Microsoft Office document you worked on earlier, open the most recently used list and select the file you want to open. In Office XP (2002) and 2003, the list is located at the bottom of the WebCenter Content menu. In Office 2007 and 2010, it is in the **Recent Content Items** dropdown menu in the WebCenter Content ribbon. If

the document was last opened in read-only mode ('view'), you are asked whether you want to open it in read-only mode again or if you want it opened in full edit mode ('open'). See [Section 9.6, "Content Management Actions on Files"](#) for a comparison between viewing and opening a file.

11.4 Checking Out a Managed Document in View Mode

A managed document that you open in a Microsoft Office application may not be checked out of the content server. This is the case in the following situations:

- You open a managed Office document from a content folder in view mode. See [Section 11.2, "Opening and Viewing an Existing Managed Document."](#) This downloads a copy of the managed document from the server to your local cache, but does not check it out.
- You open a managed Office document from your local file system (for example, saved as an e-mail attachment). Desktop detects it is a managed document, but does not check it out.

You can make changes to the document, but you cannot check it back in to the server as a new revision of the existing content item without checking it out first. If you do not check out the document, you can always check it in as a new content item using the **Save As New** option.

To check out a managed document from within an Office application, use the **Check Out** option in the WebCenter Content menu or ribbon. What happens depends on the state of the managed document that is currently open in the Office application:

- The managed document currently open in the Office application is the latest revision on the server and it is not already checked out. When you choose **Check Out**, the document is checked out of the server and its read-only status in the Office application revoked. You can now edit the document as required and check it back in to the server as a new revision of the existing content item.
- The managed document currently open in the Office application is not the latest revision on the server. This situation could, for example, arise if you were e-mailed a managed Word document and someone has checked a new revision of that document in to the content server by the time you are ready to check in your document.

You are then presented with two options: (1) download, check out, and edit the latest revision from the content server, or (2) continue to edit the current, outdated copy on your local computer. You can edit the document as required and check it back in to the server as a new revision of the existing content item.

- The current document is not the latest revision and there is already a modified version of the document in your local cache. This situation could, for example, arise if you checked out a document and made changes, saved and closed the document without checking it in, and then viewed any revision of the document from the server.

You are then presented with two options: (1) close the current document and edit the previously modified copy in your local cache instead, or (2) edit the current copy and discard all previous modifications (as stored in the locally cached copy).

After you check out a read-only document, you will see that the "(Read-Only)" indicator in the application title bar disappears. In addition, the information bar changes to reflect the new document state.

Please note that you cannot check out a read-only document if it is in a file format that does not support embedded Office properties (such as RTF, XML, or plain text). See [Section 4.6, "Microsoft Office Document Properties"](#) for more information on embedding custom Office properties. If you cannot check out the current read-only document, the Check Out option is not available.

11.5 Opening a Different Revision of a Managed Document

When you open a managed Office document from an Oracle WebCenter Content Server instance that has multiple revisions, you can choose to open a different document revision instead of the current one. This may be useful if you opened a document that may have newer revisions on the server; for example, because it was e-mailed to you as an attachment some time ago and newer revisions may have been checked in after that. There may also be situations where you may want to open an older document revision than the one you opened in the Office application.

Tip: You can avoid the situation of obsolete document attachments by e-mailing links to content items rather than the files themselves. This works only if the file recipient has access to the content server that stores the attached file. See [Section 11.11.2, "Inserting Links."](#)

To check the revision history of the currently open managed document and potentially open a different revision:

1. Open the managed document in the Microsoft Office application.
2. Open the **WebCenter Content** menu or ribbon, and then choose **Revisions** (Office 2007 and 2010) or **Open Revisions** (Office XP and 2003).

The Select Revision dialog opens (see [Section A.20, "Select Revision Dialog"](#)).

3. Select the document revision you want to open and click **OK**.

The currently open document is replaced with the selected document revision in read-only mode. If you want to edit the document and save it as a new revision of the existing content item on the server, you must check it out first by selecting the **Check Out** option in the WebCenter Content menu or ribbon. Otherwise you can only check it in as a new content item.

11.6 Refreshing a Managed Document

When you open a managed Office document that resides on an Oracle WebCenter Content Server instance, you can refresh it to show the latest revision from the content server. This may be useful if you opened a document that may have newer revisions on the server; for example, because it was e-mailed to you as an attachment some time ago and newer revisions may have been checked in after that.

Tip: You can avoid the situation of obsolete document attachments by e-mailing links to content items rather than the files themselves. This works only if the file recipient has access to the content server that stores the attached file. See [Section 11.11.2, "Inserting Links."](#)

To refresh the current managed document, open the WebCenter Content menu or ribbon and then choose **Refresh**. The latest revision of the current managed document is then downloaded from the server and opens in the Office application (replacing the

old revision). You can then edit the document as required and check it back in to the content server as a new revision of the existing content item (see [Section 11.8, "Saving and Checking In an Existing Managed Document"](#)).

11.7 Creating and Checking In a New Managed Document

If you create a new document or open an unmanaged document in a Microsoft Office application, you can check it in to a content server. This uploads and submits the file to the server and makes it available to other users on the server in accordance with their assigned access privileges.

To check in an Office document that is not yet managed on a content server:

1. Open an existing, unmanaged Office document in the Microsoft Office application (using the application's built-in file-open features), or create a new document.
2. When you are ready to check the document in to a content server as a new content item, open the WebCenter Content menu or ribbon, and choose **Save As New**.

The Save dialog opens (see [Section A.11, "Save Dialog \(Save As New\)"](#)).

3. You can check in the document in either of two ways:
 - by using a check-in form (Oracle WebCenter Content Server instances only), or
 - by selecting a folder on a server where the document should be saved.

The file name that you specify will also be the content item title (minus the file extension).

By default, a file is closed in the Microsoft Office application after it is checked in to a content server. Select the **Reopen after check-in** check box if you want the document to be reopened automatically after it is checked in. (The file is also checked out of the content server again.) This is useful if you want to continue to work on the document after check-in.

After you check a document in to a content server, it is available to other users on the server, depending on the content item's assigned security restrictions and users' access privileges.

11.8 Saving and Checking In an Existing Managed Document

After you have opened a managed document in a Microsoft Office application (see [Section 11.2, "Opening and Viewing an Existing Managed Document"](#)), you can modify it and check it back in to the server. If you opened the document in full edit mode ('open'), you can check it in as a new revision of the existing content item on the server. If you opened it in read-only mode ('view'), you can make changes, but you must check it in as a new content item. You can check in managed Microsoft Office documents from within their applications at different editing points:

- [Section 11.8.1, "Checking In a Managed Document While Editing It"](#)
- [Section 11.8.2, "Checking In a Managed Document When Closing It"](#)

Note: This section covers checking in managed documents from within Microsoft Office applications. Of course, you can also check them in from Windows Explorer. See [Section 10.11, "Checking In Content Files"](#) for further details.

11.8.1 Checking In a Managed Document While Editing It

Every time you save the current managed document (for example, by pressing **Ctrl+S**), it is updated in the Desktop cache on your computer (see [Section 9.5, "Local Caching of Content Files"](#)), but not checked in to the content server. To check in the document while you are editing it, choose **Check In** in the WebCenter Content menu or ribbon. This automatically uploads the document to the content server and creates a new revision of the content item (for Oracle WebCenter Content Server instances) or overwrites the existing file (for Oracle Content Database servers and other WebDAV servers). New revisions inherit all metadata from the previous revision. If you have any unsaved changes in your document, these are saved before the check-in.

Note: The **Check In** option is not available for read-only managed documents, since you must check these in as new content items (**Save As New**). You may be able to check out read-only documents from within the application, so you can check them back in to the server as new revisions. See [Section 11.4, "Checking Out a Managed Document in View Mode"](#).

Before the document is checked in to an Oracle WebCenter Content Server instance, you may be given the opportunity to provide a comment in the Check-in Comment dialog (see [Section A.21, "Check-in Comment Dialog"](#)) (providing this has been enabled on the server). Enter the comment and click **OK** to check in the document. You can click **Recent Comments...** to see a list of comments submitted for recent check-ins which you can reuse or modify. The list includes all recent comments for all Office applications and all documents on your computer. If the managed document already had an existing comment, this is shown as the default. If you want, you can select the check box to reopen (and check out) the document after it is checked in, so you can continue to work on it and check it in again later (as another new revision).

If you want to modify the content item metadata before checking the managed document in to the server, choose **Check In With Metadata** in the WebCenter Content menu or ribbon to open a check-in dialog (see [Section A.12, "Check In Content Dialog \(Check In With Metadata\)"](#)). After the check-in, the document is closed automatically.

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

11.8.2 Checking In a Managed Document When Closing It

In addition to checking in a managed Microsoft Office document while editing it, you can also check it in when closing the document or exiting the Office application. What happens depends on the Desktop configuration on your computer. By default, you see a special close dialog for managed documents (see [Section 4.4, "Close Dialog"](#)), but you can also configure your computer to suppress this close dialog and basically close managed documents in the same way as unmanaged Office documents ("Do you want to save the changes?"). See [Section B.1, "Setting Windows Explorer Integration Options"](#) for instructions.

Special Document Close Dialog

By default, a special close dialog is shown that provides a number of save options for the current document (see [Section A.16, "Save Changes and Check In Document Dialog"](#)). The table below lists all possible save scenarios for these dialogs, with an explanation of what happens for each of them.

Please note that 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 WebCenter 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 [Section 13.3, "Approving or Rejecting Files in Workflows"](#)).

Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 1	Yes	Yes	No	n/a	<p>Any unsaved changes to the document are saved, and the document is automatically checked in to the content server as a new revision of the existing content item, inheriting all metadata from the previous revision.</p> <p>After the document has been checked in to the content server, it is closed in the Microsoft Office application.</p>
Scenario 2	Yes	Yes	Yes	n/a	<p>Any unsaved changes to the document are saved, and you are given the opportunity to modify the file's metadata before check-in. When you are done, the file is checked in to the content server as a new revision of the existing content item.</p> <p>After the document has been checked in to the content server, it is closed in the Microsoft Office application.</p>
Scenario 3	Yes	No	n/a	n/a	<p>Any unsaved changes to the document are saved, but the document is not automatically checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 11.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 10.11, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p> <p>You should use the application's built-in save-as feature if you want to save the file in a different location than the local cache (that is, as an unmanaged file on your own computer).</p>

Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 4	No	No	n/a	No	<p>The changes to the document are discarded and the document is not checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 11.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 10.11, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p>
Scenario 5	No	No	n/a	Yes	<p>Any changes to the document are discarded and the document is closed. The checked-out status of the content item is cancelled on the server, which means that other users on the server can check out the file.</p>

Simple Document Close Message

Depending on your Desktop configuration, you may not see the special close dialog for managed documents. If there are **no unsaved changes** in the document, the document closes without any user interaction. If there are any **unsaved changes** in the document, you are prompted to specify whether these should be saved before closing the document. If you choose 'No', you will lose the changes. It is important to note that the document is *not* automatically checked back in to the content server and it remains checked out. Other users on the content server cannot check out the document until you check it back in or undo the check-out. The saved file is stored in a special cache on your local computer (see [Section 9.5, "Local Caching of Content Files"](#)). You can reopen the document and check it in using the **Check In** option (see [Section 11.8.1, "Checking In a Managed Document While Editing It"](#)), or you can check it in from Windows Explorer (see [Section 10.11, "Checking In Content Files"](#)).

If **no changes** were made to the document at all since you opened it, you are prompted to specify whether the checked-out status of the document should be canceled ("undo check-out") before the document is closed. This releases the document on the content server, so that other users may check it out.

11.9 Turning an Unmanaged Document into a Managed Document

If you have an existing, unmanaged Microsoft Office document on your local computer, you can check it in to a content server and make it available to the users on that server according to their assigned access privileges. You can either do this from the associated Microsoft Office application or from Windows Explorer.

Within the Office Application

To check in an existing, unmanaged Microsoft Office document:

1. Open an existing, unmanaged Office document in the Microsoft Office application using the application's built-in file-open features.
2. When you are ready to check the document in to a content server as a new content item, open the WebCenter Content menu or ribbon, and choose **Save As New**.

The Save dialog opens (see [Section A.11, "Save Dialog \(Save As New\)"](#)).

3. You can check in the document in either of two ways:
 - by using a check-in form (Oracle WebCenter Content Server instances only), or
 - by selecting a folder on a server where the document should be saved.

The file name that you specify will also be the content item title (minus the file extension).

By default, a file is closed in the Microsoft Office application after it is checked in to a content server. Select the **Reopen after check-in** check box if you want the document to be reopened automatically after it is checked in. (The file is also checked out of the content server again.) This is useful if you want to continue to work on the document after check-in.

From Windows Explorer

You can also turn an unmanaged Office document into a managed document from Windows Explorer, simply by dragging-and-dropping or copying-and-pasting the file into a content folder on a server. See [Section 10.6, "Creating New Content Files"](#) for further details.

11.10 Turning a Managed Document into an Unmanaged Document

After you have opened a managed Office document, you can 'unmanage' that document; that is, remove the document properties that associate it with a particular content server (see [Section 4.6, "Microsoft Office Document Properties"](#)). This effectively turns the document into a brand-new, unsaved document that you cannot check back in to the server as a new revision of the original document. You can, of course, check it in to the server as a new content item (using the Save As New option), or you can save it as a local file. Please note that the original content item remains available on the content server.

To turn the current managed document into a new, unmanaged document, open the WebCenter Content menu or ribbon and then choose **Unmanage** and click **OK** in the dialog reminding you of the consequences of this action.

11.11 Inserting Managed Content into Office Documents

This section covers these topics:

- [Section 11.11.1, "About Inserting Managed Content into Microsoft Office Files"](#)
- [Section 11.11.2, "Inserting Links"](#)
- [Section 11.11.3, "Inserting Files"](#)
- [Section 11.11.4, "Inserting Images"](#)

11.11.1 About Inserting Managed Content into Microsoft Office Files

Desktop ties in to the built-in object insertion features of Microsoft Office applications by enabling you to insert items from Oracle WebCenter Content Server instances into Word, Excel, and PowerPoint documents. You can insert links to files on a server, the actual contents of files from a server, or images from a server. The items are always inserted at the current cursor position in the Office document. The Office document into which you insert managed content or links to managed content do not have to be managed documents themselves.

Note: You can insert multiple items into a document at a time, but only if the Oracle WebCenter Content Server instance is running the Desktop 11gR1 component at least at the 11.1.1.6 level. If this is not the case, you can only insert one item at a time.

The following sections provide more information about inserting managed content:

- [Section 11.11.1.1, "Understanding Inserted Links"](#)
- [Section 11.11.1.2, "Understanding Inserted Files"](#)
- [Section 11.11.1.3, "Understanding Inserted Images"](#)

11.11.1.1 Understanding Inserted Links

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

When inserting links into 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 content items:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
- **HTML Rendition:** This links to an HTML version of the original file, as converted on the content server when the file is requested for viewing.
- **Content Information page:** This links to the page on the content server that provides metadata information about the content item (title, author, and so on). This page also includes links to the various available renditions of the content item.

- **Other renditions:** There may be additional, custom renditions available on an Oracle WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

Link Text

When inserting a hyperlink, you can provide a link text, which is the hyperlinked text that is inserted into the Microsoft Office document. The default is the title of the selected content item (as stored on the content server), but you can modify this as needed. If you provide no text at all, the link text will be the full URL to the selected link target.

Link to Latest Revision

When inserting a hyperlink, you can specify that the link should always point to the latest released revision of the file on the content server. This means that the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.

11.11.1.2 Understanding Inserted Files

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

File contents are inserted statically; that is, there is no dynamic link between the file contents in the 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) into an unsealed document.

File Rendition

When inserting the contents of a file from a content server, you can specify the file rendition that should be inserted:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
- **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).

- **Other renditions:** There may be additional, custom renditions available on an Oracle WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

11.11.1.3 Understanding Inserted Images

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

Inserted images are not linked to their content items on the server. This means that an inserted image in a document is not updated automatically if its source image is updated on the content server, or vice versa.

Whether an image can be inserted into the 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 WebCenter Content Server instance. The default is the **alternate file**, but server administrators may configure the content server to include other custom renditions of content items in this list.

Alternative Text

When inserting an image, you can specify the alternative text for the image, which is the text that appears when you hover the mouse cursor over the image in a web environment (that is, the text for the ALT attribute of the IMG tag). The default is the title of the selected content item (as stored on the content server), but you can modify this as needed.

11.11.2 Inserting Links

To insert hyperlink to one or more files on an Oracle WebCenter Content Server instance into the current Office document:

1. Move the cursor to the position in the Office document where you want to insert one or more hyperlinks.
2. **Microsoft Office XP (2002) or 2003:** On the **WebCenter Content** menu, choose **Insert...**

Microsoft Office 2007 or 2010: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens (see [Section A.19, "Insert Content Item Dialog"](#)).

3. Open the **Link** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to link to. Please note that the list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers. See [Section A.10, "Select Content Dialog"](#) for more information.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to link to, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected file, provide the **link text** for the hyperlink that will be inserted in the Office document. The default is the title of the selected content item (as stored on the content server), but you can modify this as needed. If you provide no text at all, the link text will be the full URL to the selected link target.
6. For each selected file, select the **file rendition** that the hyperlink should point to:
 - Native Rendition
 - Web-Viewable Rendition
 - HTML Rendition
 - Content Information page

For more information, see [Section 11.11.1.1, "Understanding Inserted Links."](#)

7. For each selected file, specify whether the hyperlink should always point to the **latest revision**. If you select the check box, the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.
8. Click **OK** to insert the hyperlink or hyperlinks into the Office document.

11.11.3 Inserting Files

To insert the contents of one or more files on an Oracle WebCenter Content Server instance into the current Office document:

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

Microsoft Office 2007 or 2010: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens (see [Section A.19, "Insert Content Item Dialog"](#)).

3. Open the **File** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server whose contents you want to insert. Please note that the list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers. See [Section A.10, "Select Content Dialog"](#) for more information.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files whose contents you want to insert, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected file, select the **file rendition** whose contents you want to insert:
 - Native Rendition
 - Web-Viewable Rendition

For more information, see [Section 11.11.1.2, "Understanding Inserted Files."](#)

6. Click **OK** to insert the contents of the selected file or files into the Office document.

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

11.11.4 Inserting Images

To insert one or more images on an Oracle WebCenter Content Server instance into the current Office document:

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

Microsoft Office 2007 or 2010: On the **WebCenter Content** ribbon, choose **Insert** in the **Insert** group.

In Microsoft Word and Excel, you can also right-click and choose **Insert WebCenter Content** from the context menu.

The Insert Content Item dialog opens (see [Section A.19, "Insert Content Item Dialog"](#)).

3. Open the **Image** panel.
4. Click **Browse** to open the Select Content dialog, where you can locate and select the image or images on the content server that you want to insert. Please note that the list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers. See [Section A.10, "Select Content Dialog"](#) for more information.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the image or images you want to insert, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

5. For each selected image, specify the alternative text, which is the text that appears when you hover the mouse cursor over the image in a web environment (that is, the text for the ALT attribute of the IMG tag). The default is the title of the selected content item (as stored on the content server).
6. For each selected image, select the **file rendition** that you want to insert:
 - Native Rendition
 - Web-Viewable Rendition

For more information, see [Section 11.11.1.3, "Understanding Inserted Images."](#)

7. Click **OK** to insert the selected image file or files into the Office document.

11.12 Comparing Managed Microsoft Word Documents

This section covers these topics:

- [Section 11.12.1, "About Comparing Managed Word Documents"](#)
- [Section 11.12.2, "Comparing a Word Document with a Different Revision"](#)
- [Section 11.12.3, "Comparing a Word Document with Another Document"](#)

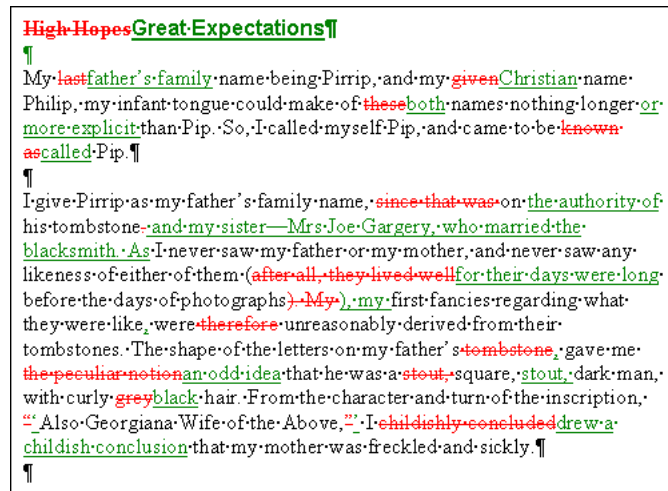
11.12.1 About Comparing Managed Word Documents

Desktop ties in to Microsoft Word's built-in document comparison features by enabling you to compare the current document in Word with a file on a content server. You can compare the current document with a different revision of that same document (providing the current document is managed on a content server) or with an altogether different content item on the server.

When you compare the documents, Microsoft Word shows the differences between them in a new document with marks that show where deletions, insertions, or other editing changes have been made in the original document. Please note that how the

changes are represented exactly depends on the version and configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification (Figure 11–2).

Figure 11–2 *Marked Differences in Word Document*



If you hover your mouse cursor over a marked change in the document, a screen tip is displayed providing content management information about that file, as shown in Figure 11–3. The following information is provided: the content ID, file size, and, if the file is currently checked out, the user name of the person who checked it out.

Figure 11–3 *screen Tip Showing Information About File Change*



11.12.2 Comparing a Word Document with a Different Revision

If the current managed Word document resides on an Oracle WebCenter Content Server instance and it is not a read-only copy (see Section 9.6, "Content Management Actions on Files"), you can compare it with a different revision of the same document. To do so, perform these steps:

1. Open the managed document in Microsoft Word (see Section 11.2, "Opening and Viewing an Existing Managed Document").
2. **Microsoft Word 2002 (XP) or 2003:** On the **WebCenter Content** menu, choose **Compare With** and then **Revision...**

Microsoft Word 2007 or 2010: On the **WebCenter Content** ribbon, choose **With Revision** in the **Compare** group.

Note: If the option to choose a different revision is not available, then the current document is either not managed by a content server or it is currently in read-only mode.

The Select Revision dialog opens, which shows all revisions of the current document on the server (see [Section A.20, "Select Revision Dialog"](#)).

3. The top of the dialog shows which revision is currently open in Microsoft Word, along with some information about the content item (title, server, content ID, author, and the like). At the bottom is a list of all existing revisions of the content item, along with their title, author, release date, and comments. If you would like to see more information about any particular revision, select that revision in the list and choose **Content Information...** to open that revision's content information page on the server.
4. Select the revision that you want to compare the current document with in the list of revisions, and click **OK**.

Microsoft Word's built-in comparison features are now used to compare the current document with the revision that you selected, and the changes are shown in a new document. How the changes are represented exactly depends on the version and configuration of your Microsoft Word application, but insertions and deletions are typically shown in different colors and formatting for easy identification.

11.12.3 Comparing a Word Document with Another Document

You can compare the current Word document (managed or unmanaged) with a different document on the content server. To do so, perform these steps:

1. Open the document in Microsoft Word (see [Section 11.2, "Opening and Viewing an Existing Managed Document"](#)).
2. **Microsoft Word 2002 (XP) or 2003:** On the **WebCenter Content** menu, choose **Compare With** and then **Content Item...**

Microsoft Word 2007 or 2010: On the **WebCenter Content** ribbon, choose **With Content Item** in the **Compare** group.

Note: If you want to compare the current managed Word document with a document on your local computer (not stored on a content server), simply use Word's built-in compare feature to select the file.

The Select Content dialog opens, where you can search for, or browse to, a Word document on a content server (see [Section A.10, "Select Content Dialog"](#)).

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.

Working with Managed E-mail

This section covers these topics:

- [Section 12.1, "About E-mail Client Integration"](#)
- [Section 12.2, "E-mail Specific Metadata on Oracle WebCenter Content Server"](#)
- [Section 12.3, "Default E-mail Metadata and File Names"](#)
- [Section 12.4, "Setting the E-mail Attachment Option"](#)
- [Section 12.5, "Checking In E-mail"](#)
- [Section 12.6, "Inserting Links to Content Files on a Server into E-mail"](#)
- [Section 12.7, "Attaching Content Files on a Server to E-Mail"](#)
- [Section 12.8, "Creating a New E-mail that Includes Links to a File"](#)
- [Section 12.9, "Opening Checked-In E-mail Messages"](#)
- [Section 12.10, "Working with Distribution Lists"](#)

Note: See also [Chapter 10, "Working with Managed Content Files in Windows Explorer."](#)

12.1 About E-mail Client 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 WebCenter Content Server only). You can also attach managed content items from the server as well as links to them to your outgoing e-mails.

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 5, "Integration into E-mail Clients"](#) for details on how the Desktop client software integrates with your e-mail client application.

See [Chapter 9, "Understanding Content Folders and Files"](#) for general information about content folders and files.

12.2 E-mail Specific Metadata on Oracle WebCenter Content Server

With the Desktop components installed on an Oracle WebCenter 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 12–1](#) below). These are all optional metadata fields, which means you do not need to provide values for them in order to check in an 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 12–1 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).

12.3 Default E-mail Metadata and File Names

Oracle WebCenter Content Server

Oracle WebCenter Content Server can store multiple files of the same name as separate content items. However, in the integration of Oracle WebCenter Content Server with your Windows desktop application, file names in content folders need to be unique (in the same way that a folder in Windows cannot contain two files of the same name). Because of this requirement, when you add an 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 *Our discussion.msg* is in a folder on the server and you add a second *Our discussion.msg* file to that same folder, then the second file becomes a new revision of the first file. If *Our discussion.msg* is in a folder and you add *Our recent discussion.msg* or *Our discussion.eml* to that folder, then they remain separate content items because they have different file names.

The file name that is displayed in the Name column in Windows Explorer or your 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 WebCenter Content Server is set up to automatically generate content IDs, then the content IDs follow the established numbering convention. If this option is not

enabled, checking in a new content item through Windows Explorer or an 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 WebCenter Content Server, there is no revisioning on these servers.)

12.4 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.

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 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Email Integration Settings...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Email Integration Settings**.

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

The Email Checkin Settings dialog opens (see [Section A.23, "Email Checkin Settings Dialog"](#)).

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 content 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.

12.5 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:

- [Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature"](#)
- [Section 12.5.2, "Checking In E-mail Messages By Dragging and Dropping"](#)
- [Section 12.5.3, "Checking In E-mail Messages with Attachments"](#)

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

You can check e-mail messages in to an Oracle WebCenter Content Server instance directly from your e-mail application (Microsoft Outlook or Lotus Notes). When you check an e-mail in to an Oracle WebCenter 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 [Section 12.5.2, "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 [Section 9.10, "Enabling Metadata Prompting for Content Folders"](#)). 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.

To check one or more e-mail messages in to an Oracle WebCenter 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 WebCenter Content Server instance. You can select multiple messages if you want. Each message will be checked in as a separate content item on the server.
3. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Mail Item....** Alternatively, you can also click the **Check In**

Mail Item button on the WebCenter Content toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **WebCenter Content** to enable it.)

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Mail Item**.

Lotus Notes: Open the **Actions** menu and then select **Check In Mail Item...**

4. If the e-mail message has any attachments, the Attachment Options dialog may be displayed, depending on your Desktop configuration (see [Section A.27, "Attachment Options Dialog"](#)).

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 [Section A.13, "Check In Content Dialog \(E-mail\)"](#)). (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 WebCenter 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 WebCenter Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle WebCenter Content Server check-in functionality.

7. In the **Profile** list, select the content profile that should be applied to the check-in form (providing any profiles are defined on the content server). Content profiles are used to limit the metadata fields shown on the check-in form (and also several other content server pages), depending on the type of content. For example, a "Sales" profile might show metadata fields for revenue numbers, sales forecasts, and the like, whereas a "Support" profile might show metadata fields for case number, status, and the like.

Please note that profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3 servers.

8. Complete the **check-in form**. 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 to "remember" the metadata used for the last check-in of an e-mail or attachment. For more information, see [Section 7.13, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

If you want the content item to show up in a content folder on the server, make sure that you specify the location in the **Folder** field.

All mandatory metadata fields are marked with an asterisk (*). The 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 WebCenter Content Server instance. If there are multiple messages or separate attachments for check-in, the Check In Content dialog reopens and you can repeat the check-in process for each item.

Tip: Attachments are always checked in first, followed by their associated 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.

12.5.2 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 [Section 12.5.1, "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 content 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 [Section 9.10, "Enabling Metadata Prompting for Content Folders"](#)).

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 WebCenter Content Server instance, you may be asked to provide metadata for the message, depending on the settings for that content folder (see [Section 9.10, "Enabling Metadata Prompting for Content Folders"](#)). If you are not prompted to provide metadata, the file inherits the default metadata assigned to the content folder (see [Section 9.4, "Content File Metadata"](#)).

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 WebCenter Content Server instance and metadata prompting is enabled for the content folder, the Check In Content dialog opens (see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#)). If metadata prompting is disabled for the folder on Oracle WebCenter 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 WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3 servers.

7. Complete the **check-in form**. 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 to "remember" the metadata used for the last check-in of an e-mail or attachment. For more information, see [Section 7.13, "Setting Metadata To Be Remembered for Form-Based Check-Ins."](#)

If you want the content item to show up in a content folder on the server, make sure that you specify the location in the **Folder** field.

All mandatory metadata fields are marked with an asterisk (*). The 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.

12.5.3 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 12-2](#) below.

Table 12-2 Handling of E-mail Attachments

Check-in Method	Check in to Oracle WebCenter Content Server	Check in to Oracle Content DB or other WebDAV server
Check In Mail Item feature (see Section 12.5.1, "Checking In E-mail Messages Using the Check In Mail Item Feature")	Attachment are checked in according to the setting in the Email Checkin Settings dialog (see Section A.23, "Email Checkin Settings Dialog").	n/a
Dragging and dropping (see Section 12.5.2, "Checking In E-mail Messages By Dragging and Dropping")	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 WebCenter 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.

12.6 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 can right-click and insert links through the context menu.

To insert links to content items 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 2002, 2003, and 2007:** Open the **Tools** menu and then select **Get Attachment...** Alternatively, you can also click the **Get Attachment** button on the WebCenter Content toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **WebCenter Content** to enable it.)

Microsoft Outlook 2010: Open the Insert or Message ribbon and then select **Get Attachment**.

Lotus Notes: Open the **Actions** menu and then select **Get Attachment...**

4. The Get Attachment dialog opens (see [Section A.28, "Get Attachment Dialog"](#)).
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to link to in the e-mail. Please note that the list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers. See [Section A.10, "Select Content Dialog"](#) for more information.

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to include. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to include in the e-mail, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

6. In the Get Attachment dialog, select the **Link** panel.
7. For each selected file, provide the **link text** for the hyperlink that will be inserted in the 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,*" for example:

Latest Sales Report: http://server.example.com/cs/idcplg?IdcService=GET_FILE&dDocName=ID1003&RevisionSelectionMethod=LatestReleased

If you specify no link text, only the URL is inserted.

8. For each selected file, select the **file rendition** that the hyperlink should point to:

- **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
 - **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
 - **HTML Rendition:** This links to an HTML version of the original file, as converted on the content server when the file is requested for viewing.
 - **Content Information page:** This links to the page on the content server that provides metadata information about the content item (title, author, and so on). This page also includes links to the various available renditions of the content item.
9. For each selected file, specify whether the hyperlink should always point to the **latest revision**. If you select the check box, the link target will always be up to date. Otherwise, the hyperlink references a specific revision of the content item, which means it will point to an older revision of the file if that file is updated on the content server.
 10. Click **OK** to insert the hyperlink or hyperlinks into the e-mail message.

12.7 Attaching Content Files on a Server to E-Mail

You can attach one or more 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 attachment feature. To use this feature, you need to use Outlook's own HTML or text editor.

To attach content items 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 2002, 2003, and 2007:** Open the **Tools** menu and then select **Get Attachment...** Alternatively, you can also click the **Get Attachment** button on the WebCenter Content toolbar. (If this toolbar is not visible, choose **View**, then **Toolbars**, and then **WebCenter Content** to enable it.)
Microsoft Outlook 2010: Open the Insert or Message ribbon and then select **Get Attachment**.
4. The Get Attachment dialog opens (see [Section A.28, "Get Attachment Dialog"](#)).
5. Click **Browse** to open the Select Content dialog, where you can locate and select the file or files on the content server that you want to attach to the e-mail. Please note that the list of available servers includes only Oracle WebCenter Content Server instances, not Oracle Content Database or other WebDAV servers. For more information, see [Section A.10, "Select Content Dialog."](#)

You can select multiple files at the same time. When searching for files, select the check box for each item in the search results list that you want to attach to the e-mail. When browsing to files in content folders, hold the Shift key for consecutive selections and Ctrl for non-consecutive selections. Click **OK** when you are done.

After you have selected the file or files you want to attach to the e-mail, the **Content Item** field in the Insert Content Item dialog shows their content IDs. If you selected multiple files, the Content Item field shows the content ID of the first selected file, and you can use the dropdown list to go to a different file.

6. In the Get Attachment dialog, select the **File** panel.
7. For each selected file, select the **file rendition** that you want to attach to the e-mail:
 - **Native Rendition:** This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents).
 - **Web-Viewable Rendition:** This links to a version of the original file that can be viewed in a web browser. You may manually specify a file as the web-viewable rendition when checking a content item into the content server, but web-viewable renditions are often created automatically on the content server and checked in along with the native file (for example, a generated PDF version).
8. Click **OK** to attach the selected content item or items to the e-mail message.

12.8 Creating a New E-mail that Includes Links to a File

When you select a file in the content folder hierarchy, you see information about that file in the preview pane. For WebCenter Content Server instances, this will be the content information page from the server; for other servers, the preview pane lists some basic file information, including its URL. You can use the **Send link by e-mail** option in the preview pane to create a new e-mail that includes links to the currently selected file.

To create an e-mail that includes links to a file:

1. Select the file in the content folder hierarchy (in the mail pane, or in Windows Explorer, Microsoft Outlook, or Lotus Notes, as available).
2. **WebCenter Content servers:** From the **E-mail** menu, select **Send link by e-mail**.

A new e-mail message opens. The subject of the message is **Re:** followed by the title of the linked file. In the body of the e-mail, three links are inserted, one to the web-viewable version of the file, one to the native version of the file, and one to the content info page for the file. If you do not want to include one of these links, you can delete it before sending the e-mail.

Content DB or WebDAV servers: In the preview pane, select **Send link by e-mail**.

A new e-mail message opens. The subject of the message is **Re:** followed by the name of the file. In the body of the e-mail, enclosed in angle brackets, is a URL that points to a web-viewable version of the file on the server.

You can now complete the e-mail and send it.

12.9 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, but you can also search for them (see [Section 10.3, "Searching for Content Files"](#)). Once you have located the e-mail message you want to view, right-click the file and choose **View** from the context menu.

12.10 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 WebCenter 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 **WebCenter Content** 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](#)

12.10.1 Checking In a New Distribution List

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

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (You may be prompted to enter your login credentials first.)
4. Click **Add**.

The Edit Distribution List dialog opens (see [Section A.25, "Edit Distribution List Dialog"](#)).

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 WebCenter Content Server instance.

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

Once the distribution list is checked in to the content server, it is included in the Distribution List Checkin dialog for that server.

12.10.2 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 WebCenter Content Server instance. To do so, perform these steps:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (You may be prompted to enter your login credentials first.)

4. Click **Address Book**.

The Check In Distribution List From Address Book dialog opens (see [Section A.26, "Check In Distribution List From Address Book Dialog"](#)).

5. In the **Show lists from** list, select the group in Microsoft Outlook that contains the distribution list you are checking in to the content server.

6. From that group, select the distribution list that you want to check in.

If you want, click **Details...** to open the properties dialog for the distribution list, including the list of addressees. This dialog is the same one that displays in Microsoft Outlook for viewing the details of a distribution list. To modify the properties, follow the instructions in Microsoft Outlook Help.

7. When you are ready to check in the distribution list, click **Check in** in the Check In Distribution List From Address Book dialog to open the distribution list check-in form.

8. Specify the appropriate metadata for the distribution list and click **Check In**.

The distribution list is checked in to the current Oracle WebCenter Content Server instance.

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

Once the distribution list is checked in to the content server, it is included in the Distribution List Checkin dialog for that server.

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.

12.10.3 Editing a Distribution List

Once you check a distribution list in to an Oracle WebCenter Content Server instance, you can modify the list by adding, changing, or removing information. Also, you can clear the information in the name and address fields by clicking **Reset**.

Important: Changes you make to the list are reflected only in the version checked in to the content server. If the list is also used in Microsoft Outlook, that version remains unchanged. When you edit a distribution list that is checked in to the content server, you can create a new revision or a new content item when you save the list.

Adding a New Member to an Existing Distribution List

To add a new member to an existing distribution list:

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

2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (You may be prompted to enter your login credentials first.)
4. Select the distribution list that you want to add a new member to.
5. Click **Edit**.

The Edit Distribution List dialog opens (see [Section A.25, "Edit Distribution List Dialog"](#)).

6. The **List name** field shows the name of the current distribution list. You cannot modify this information.
7. To add a new list member, enter a new name in the **Name** and **Address** fields. When you first open the Edit Distribution List dialog, you see the name and address fields already populated with the details of the first member in the list. To add a new member, simply overwrite these values with the name and address of the new member. This will not remove the original first addressee in the list.
8. Click **Add** to add the new member to the distribution list.

Repeat steps 6 through 8 for each new member you want to add to the distribution list.

9. When you are finished adding new members to the distribution list, click **OK** to close the Edit Distribution List dialog.

A message appears, prompting you to either check in the distribution list as a new content item or as a revision to the existing item.

10. To check in the distribution list as a new content item, choose **New Content Item**. Then, provide a new name for the distribution list and click **OK** to open the content check-in form.

To check in the distribution list as a revision to the existing content item, choose **New Revision** to open the content check-in form.

11. Provide or modify the appropriate metadata for the distribution list as needed, and click **Check In**.

The distribution list is checked in to the current Oracle WebCenter Content Server instance.

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

Changing the Name or Address of a Distribution List Member

To change the name or address of a member of a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (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 opens (see [Section A.25, "Edit Distribution List Dialog"](#)).

6. The **List name** field shows the name of the current distribution list. You cannot modify this information.
7. Select the list member whose name or address you want to modify.
8. Update the **Name** and/or **Address** field as appropriate and click **Modify** to save the changes.

Repeat steps 7 and 8 for each list member whose name and/or address you want to modify.

9. When you are finished modifying list member information, click **OK** to close the Edit Distribution List dialog.

A message appears, prompting you to either check in the distribution list as a new content item or as a revision to the existing item.

10. To check in the distribution list as a new content item, choose **New Content Item**. Then, provide a new name for the distribution list and click **OK** to open the content check-in form.

To check in the distribution list as a revision to the existing content item, choose **New Revision** to open the content check-in form.

11. Provide or modify the appropriate metadata for the distribution list as needed, and click **Check In**.

The distribution list is checked in to the current Oracle WebCenter Content Server instance.

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

Deleting a Member from a Distribution List

To delete a member from a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (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 opens (see [Section A.25, "Edit Distribution List Dialog"](#)).

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 WebCenter 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.

12.10.4 Deleting a Distribution List

You can delete a distribution list from Oracle WebCenter Content Server. When you do so, all revisions of that distribution list will be removed. If the list is also used in Microsoft Outlook, it remains unchanged and is still available through Microsoft Outlook.

To delete a distribution list:

1. Open your e-mail application (Microsoft Outlook or Lotus Notes).
2. **Microsoft Outlook 2002, 2003, and 2007:** Open the **WebCenter Content** menu and then select **Check In Distribution List...**

Microsoft Outlook 2010: Open the **WebCenter Content** ribbon and then select **Check In Distribution List**.

Lotus Notes: Open the **Actions** menu and then select **Check In Distribution List...**

3. The Distribution List Checkin dialog opens (see [Section A.24, "Distribution List Checkin Dialog"](#)). (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.

Working with Managed Content in Workflows

This section covers these topics:

- [Section 13.1, "About Managed Content in Workflows"](#)
- [Section 13.2, "Viewing All Your Workflow Assignments"](#)
- [Section 13.3, "Approving or Rejecting Files in Workflows"](#)

13.1 About Managed Content in Workflows

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

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

- [Section 13.2, "Viewing All Your Workflow Assignments"](#)
- [Section 13.3, "Approving or Rejecting Files in Workflows"](#)

13.2 Viewing All Your Workflow Assignments

You can view all your current workflow assignments for an Oracle WebCenter Content Server instance in one convenient list in Windows Explorer 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 directly from the list.

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

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

1. Open Windows Explorer or your e-mail application, and make sure the folders pane is visible.
2. Open the **WebCenter Content Servers** node. If you do not see this node in your e-mail application, enable it first (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)).
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 a Content Server 11g 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 WebCenter Content Server's web interface (under My Content Server). You can work with the files in this list directly to review them (see [Section 13.3, "Approving or Rejecting Files in Workflows"](#) below).

13.3 Approving or Rejecting Files in Workflows

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

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

1. Open the **My Workflow Assignments** node on the Oracle WebCenter Content Server instance which stores the workflow items you need to review (see [Section 13.2, "Viewing All Your Workflow Assignments"](#) above). The list shows all files on the server that you have been assigned to review. (You will typically receive an e-mail notification that you should review a content item on the server.)
2. Open the document to be reviewed in its associated application. See [Section 10.9, "Opening Content Files"](#) for further details.
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.

For Office documents, you will typically see a special close dialog for managed documents (see [Section 4.4, "Close Dialog"](#)). 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**. Alternatively, open the **File** menu 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 opens where you must provide a reason for rejecting the file. After you click **OK**, the file is sent back to the most recent workflow step that permitted contribution. The users assigned to that contribution step receive an 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.

Working with Offline Content

This section covers these topics:

- [Section 14.1, "Online and Offline Mode"](#)
- [Section 14.2, "Making Folders and Files Available Offline"](#)
- [Section 14.3, "Viewing or Opening Offline Files"](#)
- [Section 14.4, "Refreshing Offline Content"](#)
- [Section 14.5, "Removing Offline Content"](#)
- [Section 14.6, "Working with a Content Server in Offline Mode"](#)
- [Section 14.7, "Using the Offline Content Manager"](#)

14.1 Online and Offline Mode

Folders and files can be in online and offline mode. In **online** mode, you need a live connection to the content server to have access to the folders and files on it. You log in to the server and then you have access to all folders and files in accordance with your assigned privileges (see [Section 7.10, "Connecting to a Content Server"](#)).

In **offline** mode, folders and files are downloaded from a content server and read-only copies are created in a special cache location on your local computer (see [Section 9.5, "Local Caching of Content Files"](#)). This means that you can view these folders and files (in read-only mode), even if you are not connected to the content server; in other words, when you are working with that server in offline mode (see [Section 14.6, "Working with a Content Server in Offline Mode"](#)). This may be useful in situations where you need access to content files, but you cannot connect to the server that they reside on. For example, you may need read-only access to a report or a presentation you are giving while traveling. 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.

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 14-1](#)), not the folder itself. Also, this action is performed on the snapshot of the folder at that given time. If you add any new files to the folder, these are not automatically made available offline. You will need to make the folder available offline again to include the new files in the folder.

Files that are available offline show a cylinder in their file icon, which can be either blue or gray (Figure 14–1). In addition, the **Make Available Offline** option in the file context menu has a check mark.

Figure 14–1 Offline Availability Icons



The cylinder is blue if the versions of your locally cached file copy and the original file on the content server match; that is, no new revision has been checked in to the content server since you selected the file for offline availability. In other words, your local file copy is up to date. The cylinder is gray if the offline and online file versions do not match. This would, for example, be the case if someone updated the original item on the content server, and your local copy is still an older revision. In other words, your local file copy is outdated. When online, you can update an offline content folder by right-clicking it and choosing **Refresh Offline Content** in the context menu. All offline files in that folder are then overwritten with the most recent revisions of those files on the content server.

14.2 Making Folders and Files Available Offline

To make files or folders available for offline use:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Click the content server 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 **Make Available Offline** option is also available on the **File** menu. The selected folders or 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 14–1), not the folder itself. Also, this action is performed on the snapshot of the folder at that given time. If you add any new files to the folder, these are not automatically made available offline. You will need to make the folder available offline again to include the new files in the folder.

For content items in a folder to be made available offline, they must actually reside in that folder. This means that content in query folders cannot be made available offline. The contents of these folders do not actually exist in the folders; they are just grouped there because their metadata matches the search criteria. The actual content items may exist under a different folder location, or they may not even appear in a 'standard' folder at all.

14.3 Viewing or Opening Offline Files

To view or open an offline file:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.

2. Click the content server which stores the offline file that you want to view or open. If prompted, log in by entering your user name and password for that server.
3. Navigate to the offline file in the content folder tree that you want to view or open, and select it.

or

Open the **Offline Files** node for the server to see all offline files and select the offline file that you want to view or open.

4. Right-click and choose **View** or **Open with...** to open the file in read-only or full edit mode, respectively. The **View** and **Open with...** options are also available on the **File** menu. For more information, see [Section 10.8, "Viewing Content Files"](#) and [Section 10.9, "Opening Content Files."](#)

14.4 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 14-1](#)). 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.

To refresh offline files:

1. Open Windows Explorer and expand the **WebCenter 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.

14.5 Removing Offline Content

To remove an offline file or folder, so they are no longer available offline:

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

14.6 Working with a Content Server in Offline Mode

After you have made files and folders (or rather, the files in them) available offline, you have access to them even if you are not connected to the content server; in other words, when you are working with that server in offline mode.

Tip: Before going offline, you may want to refresh your local offline content to ensure you have the most recent file copies on your computer. For more information, see [Section 14.4, "Refreshing Offline Content."](#)

To work with a content server in offline mode:

1. Open Windows Explorer and expand the **WebCenter Content Servers** node.
2. Select the content server that you want to work offline with.
3. Right-click and choose **Work Offline**. The server icon now shows a red offline indicator ([Figure 14–2](#)). In addition, the **Work Offline** option in its context menu is preceded by a check mark.

Figure 14–2 Offline Oracle WebCenter Content Server



After going to offline mode, you can only access files and folders on the server that you have checked out (see [Section 10.10, "Checking Out Content Files"](#)) or specifically made available offline (see [Section 14.2, "Making Folders and Files Available Offline"](#)). The content server in the integration hierarchy includes an **Offline Files** node, which lists all files on that server that are offline, including those that are not in a content folder. You can interact with these files directly from the list.

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.

14.7 Using the Offline Content Manager

This section covers these topics:

- [Section 14.7.1, "About the Offline Content Manager"](#)
- [Section 14.7.2, "Launching the Offline Content Manager"](#)
- [Section 14.7.3, "Filtering the List of Offline Content"](#)
- [Section 14.7.4, "Performing Content Management Tasks on Offline Content"](#)

14.7.1 About the Offline Content Manager

You will generally work with offline content using the normal integration features provided by Desktop. The Offline Content Manager is a special tool 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\Roaming\Stellent\SyndicationCache

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

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

14.7.2 Launching the Offline Content Manager

To launch the Offline Content Manager, do the following:

- **Windows 7 and Windows Vista:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list (not in your favorites!) while simultaneously holding the Shift and Ctrl keys.

Note: Make sure all folders are shown in Windows Explorer (which is not the default): click **Tools**, then **Folder Options**, then **General**, and then **Show all folders**.

- **Windows XP:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list while simultaneously holding the Shift and Ctrl keys. Alternatively, Shift+Ctrl+right-click the **WebCenter Content Servers** icon on your desktop.

The context menu now includes an option called **Offline Content Manager...** Choose this option to launch the Offline Content Manager (see [Section A.29, "Offline Content Manager Dialog"](#)).

14.7.3 Filtering the List of Offline Content

The offline folders and files are shown by content server. 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.
- **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.
- **Content from certain servers:** You may choose to show or hide offline folders and files from one or more specific content servers.

To choose what to display in the list of offline content:

1. From the Offline Content Manager, click **Filter...**
The View Options dialog opens (see [Section A.30, "View Options Dialog"](#)).
2. Select or clear the check boxes of the items you want to show or hide in the offline content list.
3. Click **OK**.

14.7.4 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 [Section A.29, "Offline Content Manager Dialog"](#)) 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).

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 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. For more information, see [Section 10.8, "Viewing Content Files."](#)

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.

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.

User Interface

This section describes the user interface screens and dialogs associated with the Oracle WebCenter Content: Desktop 11gR1 client software.

Server Dialogs

- [Section A.1, "Add Server Dialog"](#)
- [Section A.2, "Server Options Dialog"](#)
- [Section A.3, "Server Properties Dialog"](#)
- [Section A.4, "Edit Server List Dialog"](#)
- [Section A.5, "Edit Server Dialog"](#)

Content Management Dialogs

- [Section A.6, "Column Settings \(or Choose Details\) Dialog"](#)
- [Section A.7, "Folder Properties Dialog"](#)
- [Section A.8, "Folder Information page"](#)
- [Section A.9, "Update Metadata Dialog"](#)
- [Section A.10, "Select Content Dialog"](#)
- [Section A.11, "Save Dialog \(Save As New\)"](#)
- [Section A.12, "Check In Content Dialog \(Check In With Metadata\)"](#)
- [Section A.13, "Check In Content Dialog \(E-mail\)"](#)
- [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#)
- [Section A.15, "Check In Document Dialog"](#)
- [Section A.16, "Save Changes and Check In Document Dialog"](#)
- [Section A.17, "Content Item Properties Dialog"](#)
- [Section A.18, "Content Query Capture Dialog"](#)
- [Section A.19, "Insert Content Item Dialog"](#)
- [Section A.20, "Select Revision Dialog"](#)
- [Section A.21, "Check-in Comment Dialog"](#)
- [Section A.22, "Recent Check-in Comments Dialog"](#)

E-mail Dialogs

- [Section A.23, "Email Checkin Settings Dialog"](#)
- [Section A.24, "Distribution List Checkin Dialog"](#)
- [Section A.25, "Edit Distribution List Dialog"](#)
- [Section A.26, "Check In Distribution List From Address Book Dialog"](#)
- [Section A.27, "Attachment Options Dialog"](#)
- [Section A.28, "Get Attachment Dialog"](#)

Offline Content Manager Dialogs

- [Section A.29, "Offline Content Manager Dialog"](#)
- [Section A.30, "View Options Dialog"](#)
- [Section A.31, "Offline Folder Properties Dialog"](#)
- [Section A.32, "Offline Content Item Properties Dialog"](#)

Note: Depending on your Windows operating system and your configuration, the dialogs 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

Add Server

Server Name: OK

Server Type: **WebCenter Content Server** Cancel

Server WebDAV URL

Enter the URL of your WebDAV server.

Typically, WebCenter Content Server's WebDAV interfaces have URLs of the following form:

`http://server/cs/idcplg/webdav`

CGI URL

Enter the CGI URL of your WebCenter Content Server.

Typically, CGI URLs have the following form:

`http://server/cs/idcplg`

Single Sign-On

Use Single Sign-On


Single Sign-On URL:

Options...

Help

Element	Description
Server Name	This is the name of the content server connection, and is the name that will be displayed in the list of available servers. The name you enter here will be used to pre-fill the server URL boxes on this dialog. If you enter a name for the connection that is not the same as the name of the server, you must change the entries in the server URL boxes accordingly.

Element	Description
Server Type	<p>Select the type of content server:</p> <ul style="list-style-type: none">■ WebCenter Content Server: This is an instance of Oracle WebCenter Content Server. 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. This server type was called 'UCM Content Server' in earlier Desktop releases.■ Content DB Server: This is an Oracle Content Database (Oracle Content DB) server. These servers offer some content management integration. You can open files directly from the server and save files to it, but you cannot search for files on the server using the Desktop client software.■ WebDAV Server: This is a server (not an Oracle WebCenter Content Server or Oracle Content Database 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 the Desktop client software. <p>Contact your content server administrator for assistance if you are not sure which server type to choose.</p>
Server WebDAV URL	<p>This box contains a suggested value if you have already entered a name into the Server Name box. You can change the suggested value if it is not appropriate.</p> <p>Enter the WebDAV URL of the content server. This information is needed to access the resources provided by the server. The URL for Oracle WebCenter Content Server instances typically has the following form:</p> <pre>http[s]://host-name:[port]/web-root/idcplg/webdav</pre> <p>For example:</p> <pre>http://server:7044/idc/idcplg/webdav http://server.example.com:16200/cs/idcplg/webdav https://server/cs/idcplg/webdav</pre> <p>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.</p> <p>Contact your system administrator if you do not know exactly what URL to use.</p>

Element	Description
CGI URL	<p>This box contains a suggested value if you have already entered a name into the Server Name box. You can change the suggested value if it is not appropriate.</p> <p>Enter the CGI URL of the content server. This box is available only for servers of type 'WebCenter Content Server'. By default, the CGI URL is the same as the WebDAV URL (see above), without '/webdav'.</p> <p>If you log in to an Oracle WebCenter 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 (?).</p>  <p>Contact your system administrator if you do not know exactly what URL to use.</p> <p>There is no CGI URL section if Windows Explorer is the only integration on your computer.</p>
Use Single Sign-On	<p>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'.</p> <p>Contact your system administrator if you do not know what URL to use.</p>
Single Sign-On URL	<p>The Single Sign-On URL box is available only if you have selected the Use Single Sign-On check box.</p> <p>Enter the URL of the single sign-on (SSO) server that is used to control access to the content server.</p> <p>Contact your system administrator if you do not know exactly what URL to use.</p>
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 Section A.2, "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 'WebCenter Content Server'.
Help	Click this button to display context-sensitive help information for this dialog.

A.2 Server Options Dialog

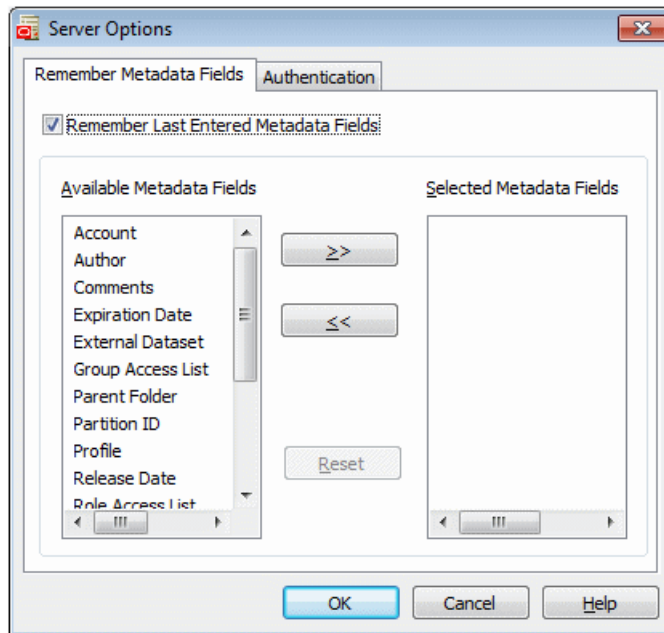
The Server Options dialog is used to configure a number of settings for an Oracle WebCenter Content Server connection. It has two tabs:



- [Server Options: Remember Metadata Fields](#)
- [Server Options: Authentication](#)

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 WebCenter 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 WebCenter 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	When Remember Last Entered Metadata Fields is selected, this box lists all available metadata fields on the content server whose values can be remembered for 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.
Selected Metadata Fields	This box lists all metadata fields on the content server whose values will be remembered with every 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.

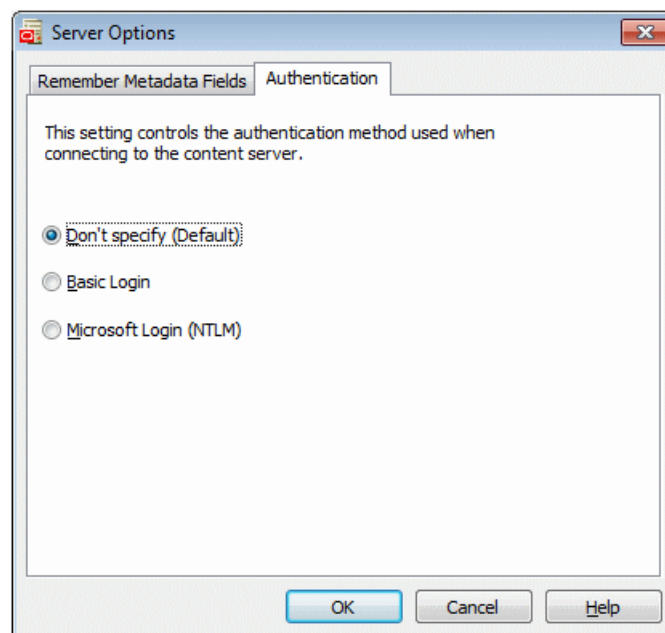
Element	Description
OK	Click this button to close this dialog and submit any changes you made.
Cancel	Click this button to close this dialog and cancel any changes you made.
Help	Click this button to display context-sensitive help information for this dialog.

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 WebCenter 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



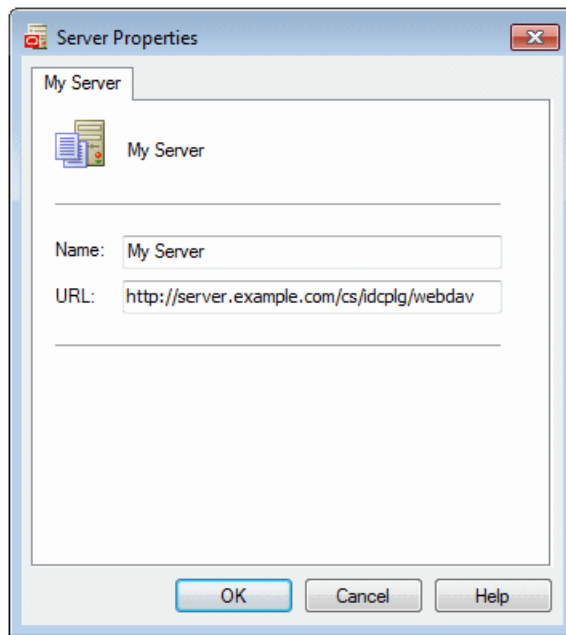
Element	Description
Don't specify (Default)	Select this option if you want to use whatever authentication method is currently set up for the content server. It is recommended that you use this setting unless you are told to use a different one.
Basic Login	Select this option if you want to force Content 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*



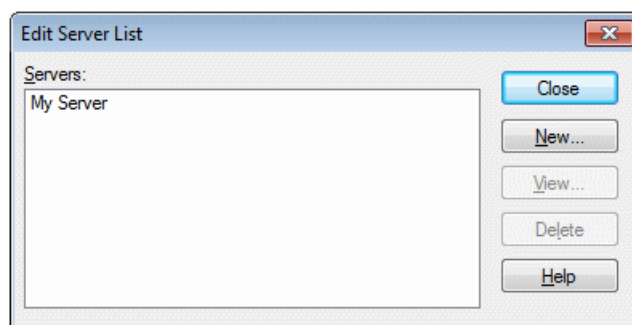
Element	Description
Name	This is the name of the content server connection as specified on the Add Server dialog (see Section A.1, "Add Server Dialog"). Please note that you cannot edit the name of a server that has any offline files or checked-out content items (in other words, there are files in the offline cache for that server).
URL	This is the WebDAV URL for the content server as specified on the Add Server dialog (see Section A.1, "Add Server Dialog"). 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.
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 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

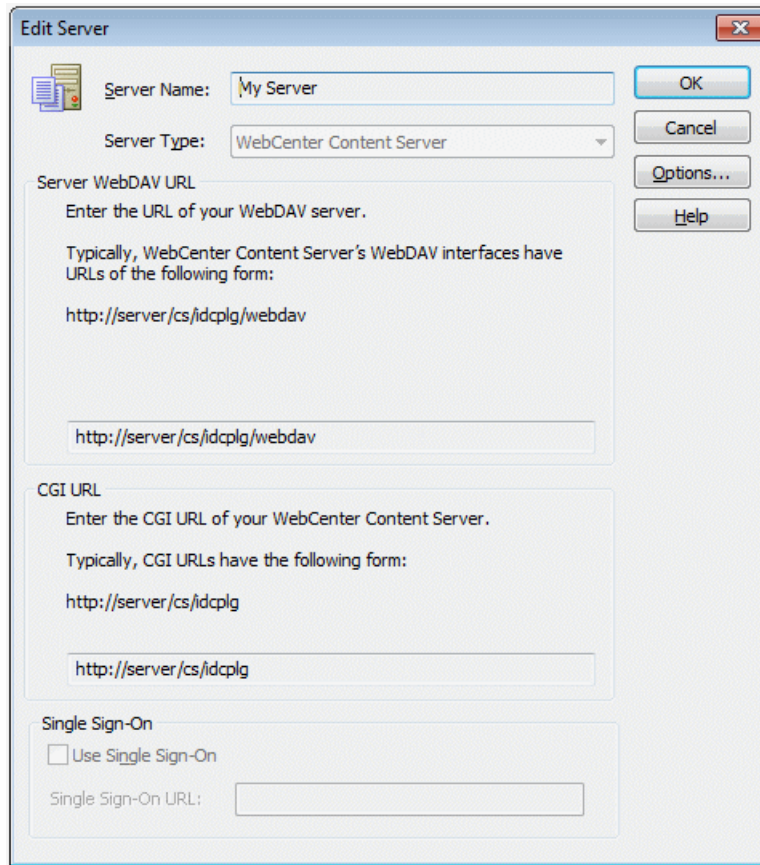


Element	Description
Servers	This area lists all defined content server connections for your own computer.
Close	Click this button to close this dialog.
New...	Click this button to open the Add Server dialog (see Section A.1, "Add Server Dialog"), where you can define a new content server connection.
View...	Click this button to open the Edit Server dialog (see Section A.5, "Edit Server Dialog"), 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 (see [Section A.1, "Add Server Dialog"](#)). You cannot edit any of the server properties, but you can click the **Options...** button to open the Server Options dialog (see [Section A.2, "Server Options Dialog"](#)), where you can set some options for the server connection (only for servers of type 'WebCenter Content Server').

Figure A-6 Edit Server Dialog



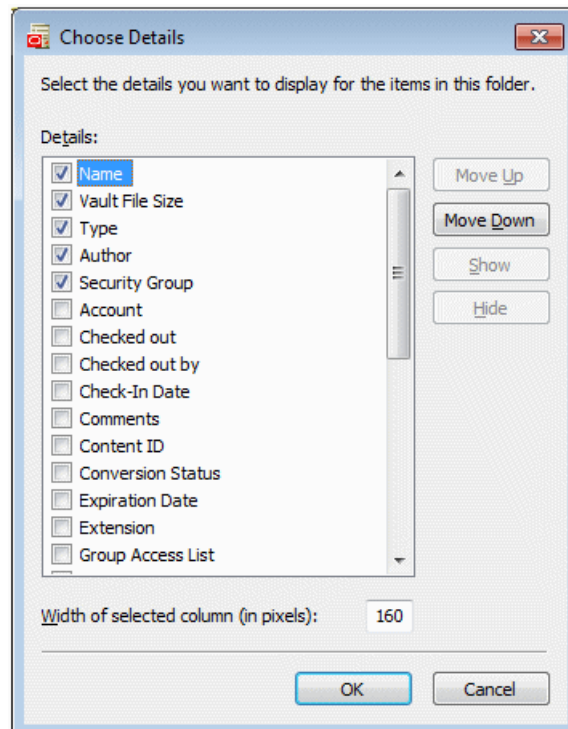
Element	Description
Server Name	This is the name of the content server connection as specified on the Add Server dialog (see Section A.1, "Add Server Dialog"). You cannot edit this information. If you want to change the name of a server, you should remove the server connection and re-create it using the name you want.
Server type	This is the type of the content server as specified on the Add Server dialog (see Section A.1, "Add Server Dialog"). Three types are supported: WebCenter 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 Section A.1, "Add Server Dialog"). 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 WebCenter Content Server instance as specified on the Add Server dialog (see Section A.1, "Add Server Dialog"). 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 'WebCenter Content Server'. 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	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 Section A.2, "Server Options Dialog"), where you can set a number of options for an Oracle WebCenter Content Server connection.
Help	Click this button to display context-sensitive help information for this dialog.

A.6 Column Settings (or Choose Details) Dialog

The Column Settings (or Choose Details) 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 (or Choose Details) Dialog

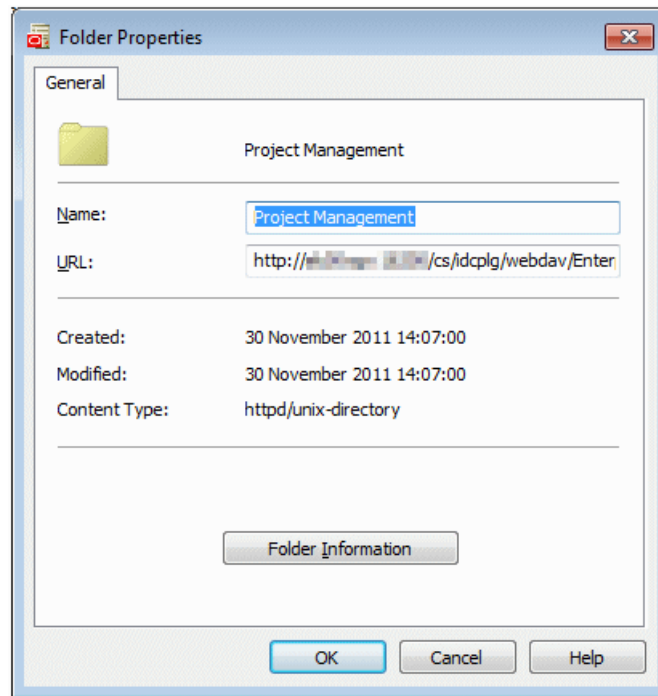


Element	Description
Column names	Select the check box of each column that you want to display for the integration folders and their files in the content pane of Windows Explorer and e-mail clients (Microsoft Outlook and Lotus Notes). The columns are displayed left to right in the order they are listed 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.)
Width of selected column (in pixels)	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.

A.7 Folder Properties Dialog

The Folder Properties dialog enables you to view and modify some properties of an existing content 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



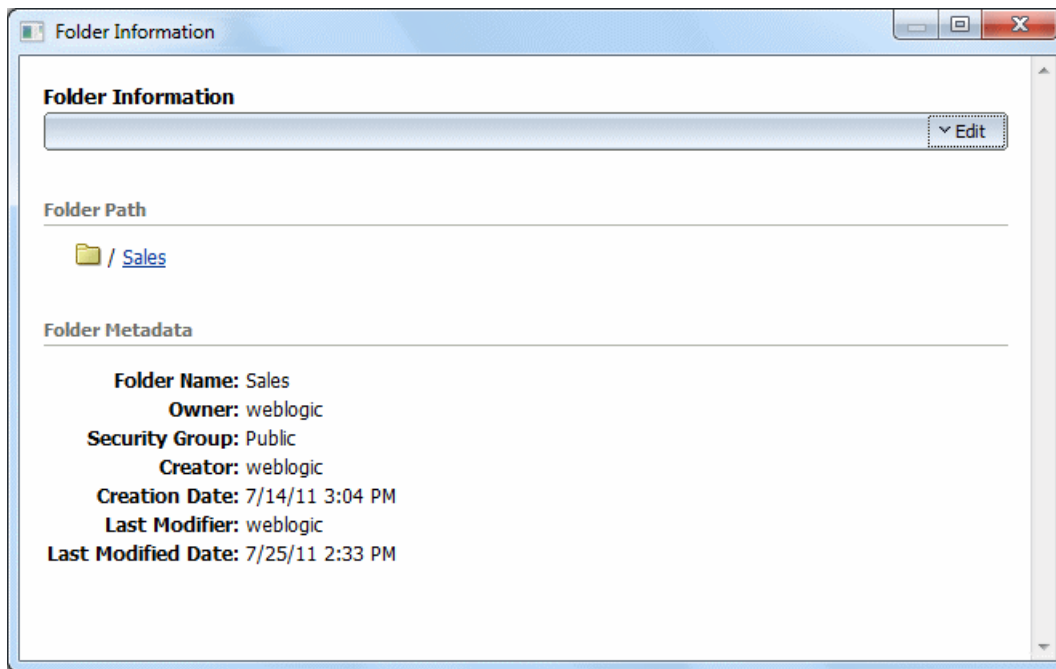
Element	Description
Name	<p>This is the name of the folder as specified when the folder was originally created. You can change the folder name, providing no other folder of the same name already exists. If you change the name of the folder here, it is also automatically changed in folder hierarchy on the content server.</p> <p>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.</p>
URL	This is the WebDAV URL of the folder.
Created	This is the date and time that the content folder was originally created.
Modified	This is the date and time that the content 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 content folder ("httpd/unix-directory").
Content Information (or Folder Information)	<p>This button is displayed for servers of type 'WebCenter Content Server' only.</p> <p>Click this button to open the Hierarchical Folder Information page, which shows a number of content management properties of the content folder. See Section A.8, "Folder Information page" below for further information.</p>
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 Folder Information page

The Folder Information page shows the properties of the current content folder. If you want to modify some folder properties, choose **Metadata Values** from the Edit menu in the top-right corner of the page.


Note: The look and feel of this page as well as the information provided on it depends on the content server configuration (including the folders feature).

Figure A-9 Hierarchical Folder Information page



Element	Description
Virtual Folder Name	This is the name of the content folder.
Owner	This is the user name of the person who "owns" the content 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).

Element	Description
Enable Metadata Prompts	<p>If this property is set to 'Yes', you are prompted to provide metadata if you drag and drop a new file to a content 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.</p> <p>If you drag and drop an existing file into a content 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).</p> <p>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 content 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.</p> <p>Please note that this field may not be available, depending on the content server configuration (more specifically, the Folders component version).</p>
Title	This is the title of the content 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 WebCenter Content Server documentation for more information on content types.
Security Group	<p>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 WebCenter Content Server documentation for more information on security groups.</p> <p>If a content item is copied from one content 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.</p>
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	<p>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 <i>and</i> 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 content folder hierarchy.</p> <p>If this property is set to 'False', the folder is visible to all users who have permission to the folder's security group.</p> <p>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:</p>  <p>Please note that this property is available only when the system administrator has enabled the hide/unhide feature on the content server.</p>
Read Only	<p>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.</p> <p>If this property is set to 'False', all folder operations are available.</p> <p>Please note that this property is available only when the system administrator has enabled the read-only feature on the content server.</p>
Inhibit Propagation	<p>If this property is set to 'True', no folder metadata is changed during metadata propagation from a higher-level folder.</p> <p>If this property is set to 'False', the folder is included in metadata propagation from a higher-level folder.</p>
Force Folder Security	<p>If this property is set to 'True', the security group and account of a content item that is copied into the content folder are always changed to match the security group and account of the target folder.</p> <p>If this property is set to 'False', a content item that is copied into the content folder retains its security group and account even they are different from the security group or account of the target folder.</p>
Folder Actions menu	<p>This menu has the following options:</p> <ul style="list-style-type: none"> ■ 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. <p>Please note that this menu may contain additional options, depending on the content server configuration.</p>

A.9 Update Metadata Dialog

The Update Metadata dialog enables you to view or edit the properties of a content folder on an Oracle WebCenter Content instance.

Figure A-10 Update Metadata Dialog

Element	Description
Filename	The name of the file whose metadata you can update.
Assign Info Form	Shows metadata options and default metadata values. You can make changes as needed. When you are done making changes, click OK .
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and save the changes.
Cancel	Click this button to close the dialog without saving the changes.

A.10 Select Content Dialog

The Select Content dialog is used to select one or more files 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 panels, each representing a way to select a file:

- **Search:** This page enables you to search for files on an Oracle WebCenter Content Server instance that meet your search criteria. You can then select one or more files in the search results list for further use. For more information, see [Section A.10.1, "Select Content: Search."](#)
- **Browse:** This page enables you to navigate to files on a content server and select one or more of them for further use. For more information, see [Section A.10.2, "Select Content: Browse."](#)
- **Offline Files:** This page lists all files that are currently in your local Desktop file cache. You can select any of these files for further use. For more information, see [Section A.10.3, "Select Content: Offline Files."](#)

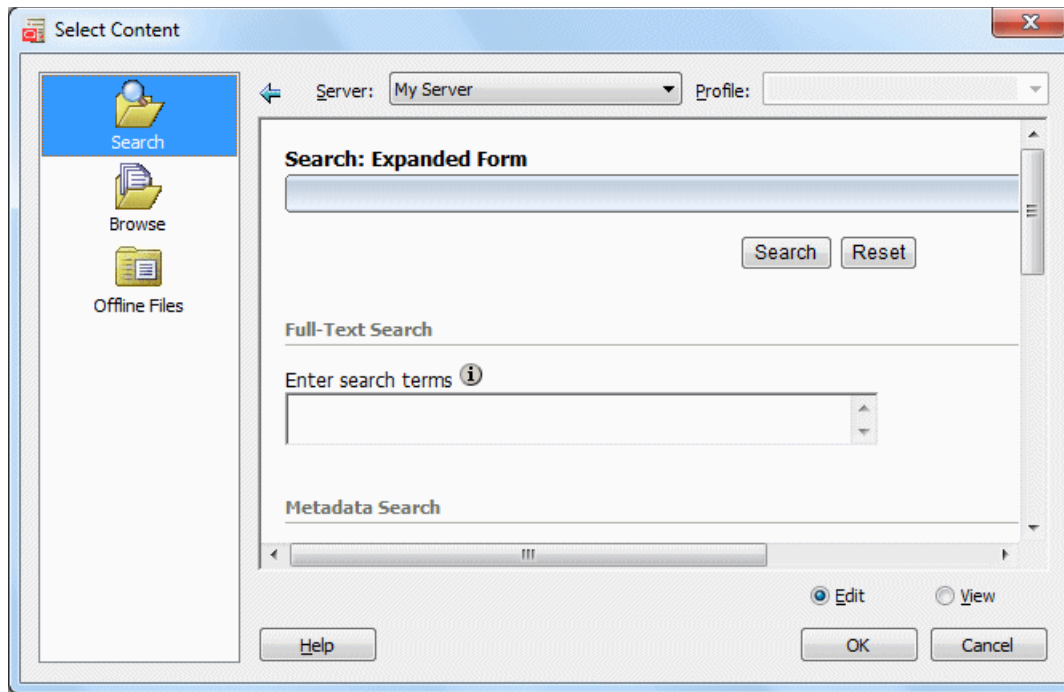
A.10.1 Select Content: Search

The Search panel in the Select Content dialog enables you to search for files on an Oracle WebCenter Content Server instance and select one or more of them 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 one or more files 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 WebCenter Content Server documentation.

Figure A-11 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-12 Search Results List

Search Results Found 3 items					
Change View Search Actions					
Filter by Category: Content Type:Document Security Group:Public					
Search Form --> Search Results					
Select	ID	Title	Date	Author	Actions
Select	DADV MH0030 444000003	Sales Report 2012	7/21/11	weblogic	
Select	DADV MH0030 444000002	Sales Report 2010	7/21/11	weblogic	
Select	DADV MH0030 444000001	Sales Report 2011	7/19/11	weblogic	

Depending on the application context, you may be able to select only one item or multiple items from the search results list. If you can select only one item for further processing, each item in the list has a **Select** button. If you can select multiple items, each item has a selection check box.

You can 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.

Element	Description
	Click the Browse icon to open the Browse page (see Section A.10.2, "Select Content: Browse").
	Click the Offline Files icon to open the Offline Files page (see Section A.10.3, "Select Content: Offline Files"). 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 WebCenter 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 WebCenter 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 WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3. Contact your content server administrator if you need any assistance.
Search form	This is the standard search form on an Oracle WebCenter 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.

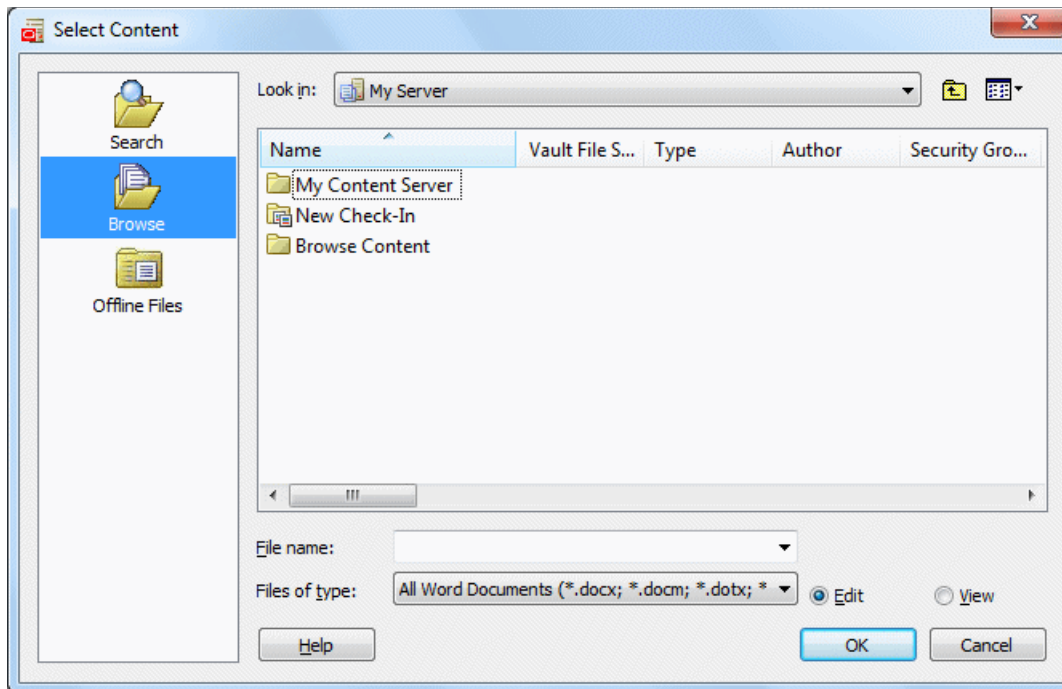
Element	Description
Edit / View	<p>These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the WebCenter Content menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application.</p> <p>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.</p> <p>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 WebCenter Content menu or ribbon).</p>
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.10.2 Select Content: Browse


The Browse panel in the Select Content dialog enables you to navigate to files on a content server and select them 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-13 Browse Panel of Select Content Dialog



Element	Description
	Click the Search icon to open the Search page (see Section A.10.1, "Select Content: Search").
	This is the icon of the current dialog.
	Click the Offline Files icon to open the Offline Files page (see Section A.10.3, "Select Content: Offline Files"). Please note that this option may not be available, depending on the context in which you are selecting a file.
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.

Element	Description
	<p>Click this icon to select the view mode of the content area:</p> <ul style="list-style-type: none"> ▪ Large Icons: This view mode displays your files and folders as large application icons with their names shown below the icons. ▪ Small Icons: This view mode displays your files and folders as small application icons with their names shown next to 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	<p>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).</p> <p>If you want, you can show or hide the preview pane in the content area: right-click, then choose View, and then Preview Pane.</p>
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	<p>These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the WebCenter Content menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application.</p> <p>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.</p> <p>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 WebCenter Content menu or ribbon).</p>
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.10.3 Select Content: Offline Files

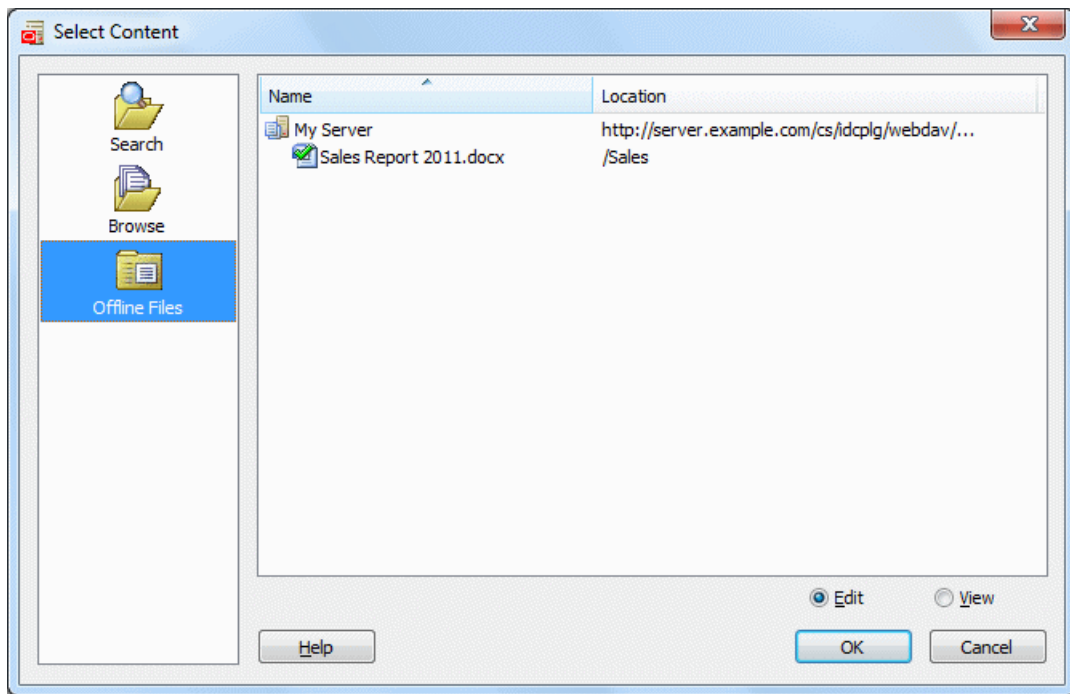
The Offline Files panel in the Select Content dialog enables you to select files in the Desktop file cache on your local computer to be opened or viewed in its native




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. For more information, see [Section 9.7, "Content File Status."](#)

Figure A-14 Offline Files Panel of Select Content Dialog



Element	Description
	Click the Search icon to open the Search page (see Section A.10.1, "Select Content: Search").
	Click the Browse icon to open the Browse page (see Section A.10.2, "Select Content: Browse").
	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 content 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	<p>These options are available only when you are opening a file in Microsoft Word, Excel, or PowerPoint using the WebCenter Content menu or ribbon. They allow you to select whether you want to open the file for editing or viewing in the current Office application.</p> <p>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.</p> <p>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 WebCenter Content menu or ribbon).</p>
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.11 Save Dialog (Save As New)

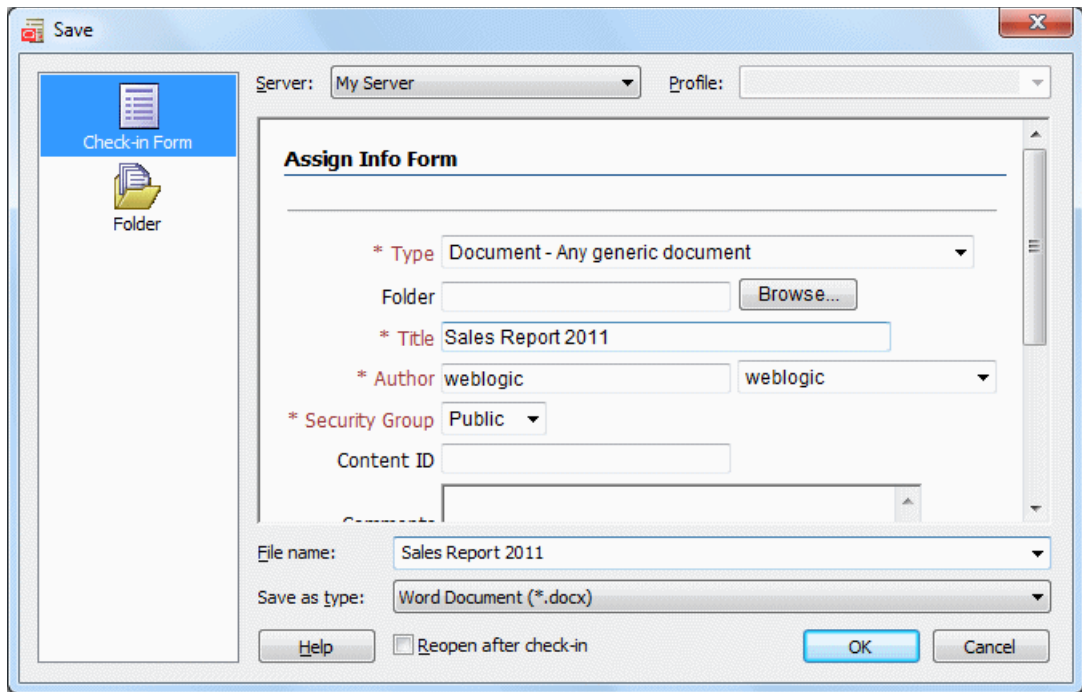
The Save dialog is used to save the current document in a Microsoft Office application and check it in to a content server as a new content item. This dialog has two pages, each representing a way to check in a file:



- **Check-in Form:** This page enables you to check the file in to an Oracle WebCenter Content Server instance using a check-in form on that server. For more information, see [Section A.11.1, "Save: Check-in Form."](#)
- **Folder:** This page enables you to check the file in to a content server by saving it into a folder on that server. For more information, see [Section A.11.2, "Save: Folder."](#)

A.11.1 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 WebCenter Content Server instance as a new content item using a check-in form on that server.

Figure A-15 Check-In Form Panel of Save Dialog



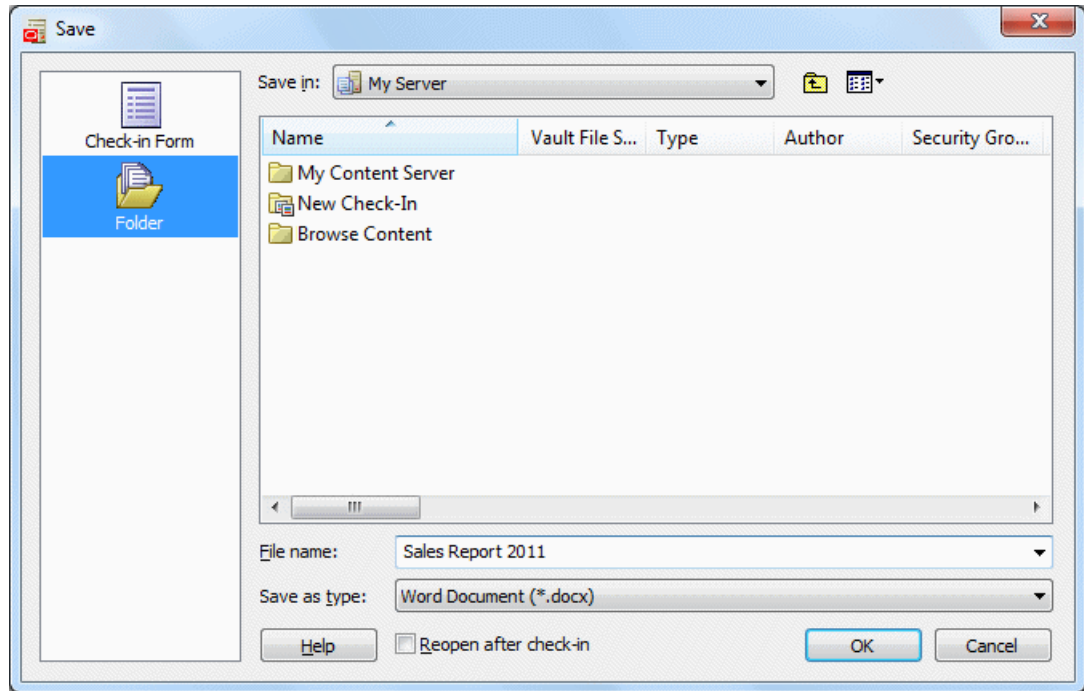
Element	Description
	This is the icon of the current dialog.
	Click the Folder icon to open the Folder page (see Section A.11.2, "Save: Folder").
Server	<p>Select the content server that you want to check the item in to. If you select a different server than the current one, you may be prompted to provide your login name and password (depending on the server configuration).</p> <p>Please note that the list of available servers only includes Oracle WebCenter Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle WebCenter Content Server check-in functionality.</p>
Profile	<p>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.</p> <p>Please note that profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3. Contact your content server administrator if you need any assistance.</p>





Element	Description
Check-in form	<p>This is the standard content check-in form on an Oracle WebCenter 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).</p> <p>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).</p> <p>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.</p> <p>All mandatory metadata fields are marked with an asterisk (*). The item cannot be checked in if any of these fields is empty.</p>
File name	<p>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).</p>
Save as type	<p>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 or .docx), XML files (.xml), single-file web pages (.mht), document templates (.dot), Rich Text Format files (.rtf), or plain text files (.txt).</p> <p>Please note that if you save and check in a document in a file format that does not support embedded Office properties (for example, RTF, XML, or plain text) and you open that file in view ("read-only") mode, you will not be able to check out the file from within the application (using the Check Out option in the WebCenter Content menu or ribbon).</p> <p>This option is not available in Microsoft PowerPoint.</p>
Reopen after check-in	<p>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.</p>
Help	<p>Click this button to display context-sensitive help information for this dialog.</p>
OK	<p>Click this button to close the dialog and check the file in to the content server using the metadata specified.</p>
Cancel	<p>Click this button to close the dialog without check the file in to the content server.</p>

A.11.2 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–16 Folder Panel of Save Dialog



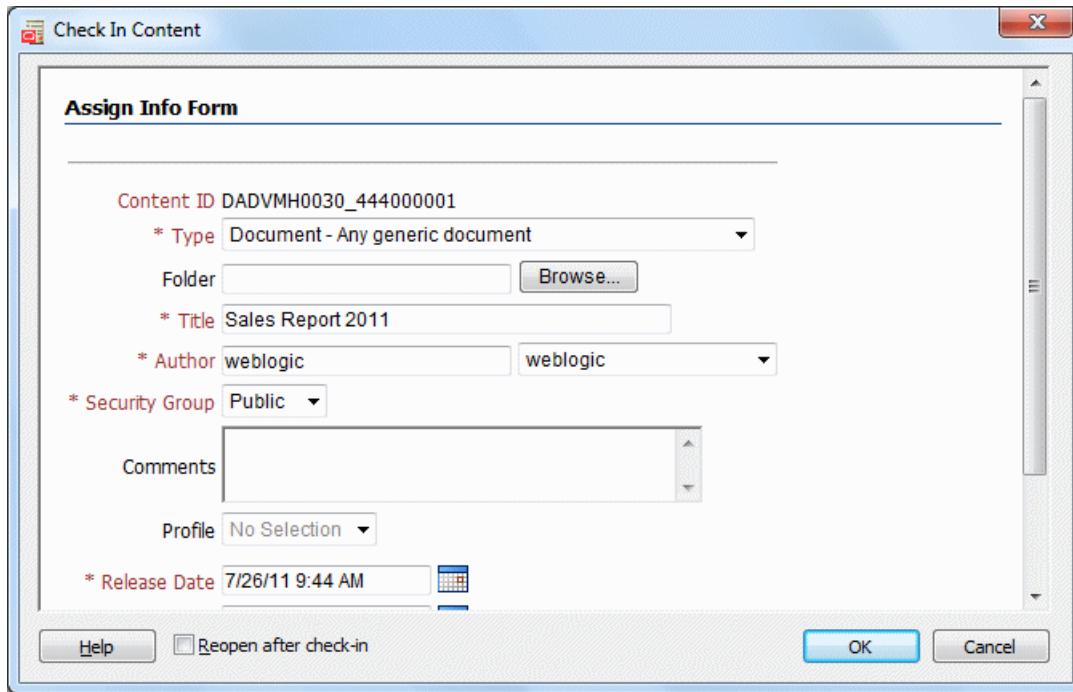
Element	Description
	Click the Check-in Form icon to open the content check-in form (see Section A.11.1, "Save: Check-in Form").
	This is the icon of the current dialog.
Save in	Select the content server that you want to check the item in to. If you select a different server than the current one, you 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: <ul style="list-style-type: none"> ■ 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).

Element	Description
Content area	This area shows the contents of the selected server or folder in the integration hierarchy. You can navigate to the content 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 WebCenter Content Server instances).
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	<p>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 or .docx), XML files (.xml), single-file web pages (.mht), document templates (.dot), Rich Text Format files (.rtf), or plain text files (.txt).</p> <p>Please note that if you save and check in a document in a file format that does not support embedded Office properties (for example, RTF, XML, or plain text) and you open that file in view ("read-only") mode, you will not be able to check out the file from within the application (using the Check Out option in the WebCenter Content menu or ribbon).</p> <p>This option is not available in Microsoft PowerPoint.</p>
Reopen after check-in	<p>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.</p>
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.12 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 WebCenter 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-17 Check In Content Dialog (Check In With Metadata)



Element	Description
Check-in form	<p>This is the standard content check-in form on an Oracle WebCenter 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).</p> <p>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.</p> <p>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.</p> <p>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.)</p> <p>All mandatory metadata fields are marked with an asterisk (*). The item cannot be checked in if any of these fields is empty.</p>
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.13 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 WebCenter 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-18 Check In Content Dialog (E-mail)

Element	Description
Server	<p>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).</p> <p>Please note that the list of available servers only includes Oracle WebCenter Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers. This is because this page uses standard Oracle WebCenter Content Server check-in functionality.</p>
Profile	<p>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.</p> <p>Please note that profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3. Contact your content server administrator if you need any assistance.</p>

Element	Description
Check-in form	<p>This is the standard content check-in form on an Oracle WebCenter 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).</p> <p>The following defaults are used for some of the metadata fields:</p> <ul style="list-style-type: none"> ■ 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. <p>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 to "remember" the metadata used for the last check-in of an e-mail or attachment. For more information, see Section 7.13, "Setting Metadata To Be Remembered for Form-Based Check-Ins."</p> <p>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.</p> <p>All mandatory metadata fields are marked with an asterisk (*). The e-mail message cannot be checked in if any of these fields is empty.</p> <p>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.</p>
Help	Click this button to display context-sensitive help information for this dialog.
OK	<p>Click this button to close the dialog and check the e-mail message in to the content server using the metadata specified.</p> <p>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.</p>

Element	Description
Cancel	<p>Click this button to close the dialog without checking the e-mail message in to the content server.</p> <p>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.</p>

A.14 Check In Content Dialog (Metadata Prompt)

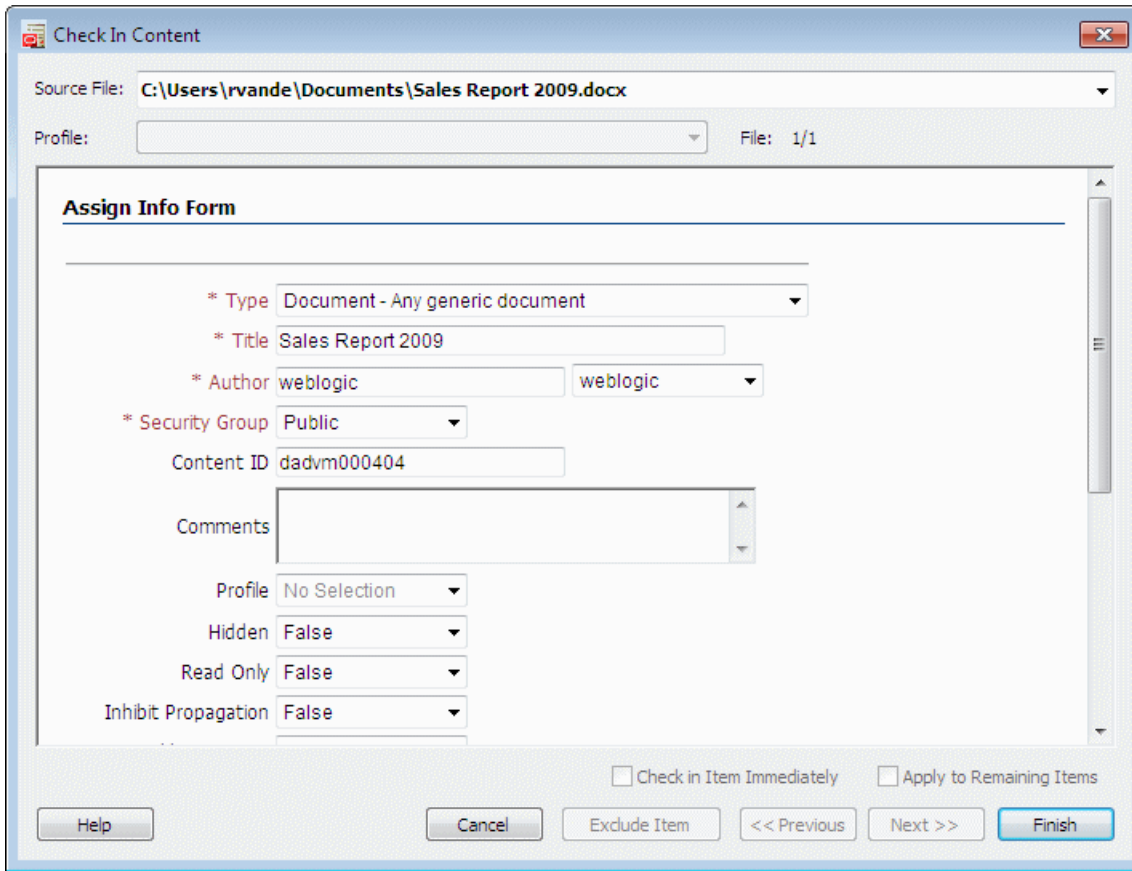
The Check In Content dialog is used to provide metadata for one or more new files that you drag and drop or copy and paste into a content folder on an Oracle WebCenter Content Server instance, before these files are checked in to the content server from your local computer, network share, or other content 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 or copy and paste an existing file into a content 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 content folder (see [Section A.8, "Folder Information page"](#)). Otherwise, a new file is always checked in to the content server automatically using the default metadata for the content folder as defined by the content server administrator. If no default metadata has been defined for the folder, you are always prompted to provide the metadata regardless of the folder setting.

You can drag and drop individual files into a content 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 content ID and title are always considered properties specific to a file and are never automatically shared between files, even if you are specifying metadata for groups of files.

Figure A-19 Check In Content Dialog (Drag and Drop)



Element	Description
Source File	<p>This field shows the full path and file name of the current file. If multiple files are dragged and dropped into the content folder, you can use the dropdown list to select a different file in the batch. Files whose metadata has not yet been set are displayed in bold in the list.</p> <p>This field is not available if the "Apply to Remaining Items" check box is selected.</p>
Profile	<p>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.</p> <p>If the content folder has a default content profile assigned to it, that profile is the default selected profile in this dialog. You may not be able to change the content profile selection, depending on the Desktop configuration on your computer (see Section B.3, "Disabling Overriding the Default Content Profile Selection").</p> <p>Please note that profiles are available only if you are connecting to Oracle WebCenter Content Server 11gR1. They are not available for Oracle Content Server 10gR3. Contact your content server administrator if you need any assistance.</p>

Element	Description
File	<p>This shows the number of current files as well as the total number of files in the current batch. For example, "1/4" means that this is the first file of a total of four new files to be checked in to the content server.</p>
Check-in form with metadata fields	<p>This is the standard content check-in form on an Oracle WebCenter 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 for the current item to its initial state (that is, remove any data that you entered on the form).</p> <p>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.</p> <p>All mandatory metadata fields are marked with an asterisk (*). The item cannot be checked in if any of these fields is empty.</p> <p>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.</p> <p>The default title for content items is the file name without the file extension (for example, 'Sales_Report_2010'). For e-mail messages, the default title is the subject line (for example, 'RE: Your sales report'). You may change the title if you want.</p> <p>The metadata for a file is set as soon as you move away from that file's check-in form by clicking the Previous or Next button, or by selecting a different file in the Source File list. To indicate metadata has been set for a file, it is no longer displayed in bold in the list. You can always return to a file to change its metadata before checking it in (unless you chose to check it in immediately; see the next field).</p> <p>You can specify metadata for multiple files at the same time by selecting the "Apply to Remaining Items" check box (see below). 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 with the "Apply to Remaining Items" check box selected.</p>
Check in Item Immediately	<p>Select this check box if you want to upload the current file and check it in to the content server immediately after clicking the Previous or Next button, or selecting a different file in the Source File list. The file is then removed from the Source File list.</p> <p>This check box is available only if multiple files are being checked in to the content server.</p>
Apply to Remaining Items	<p>Select this check box if you want the current metadata (except for the content ID and title) to be applied to the current file as well all remaining files in the batch whose metadata has not yet been set; that is, those that are displayed bold in the Source File list. Please note that the content ID and title are always considered properties specific to a file and is never automatically propagated to other files, even with this check box selected.</p> <p>This check box is available only if multiple files are being checked in to the content server and there are still files in the batch whose metadata is not set (that is, displayed bold in the Source File list).</p> <p>Please note this feature is not available in Microsoft Outlook.</p>

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

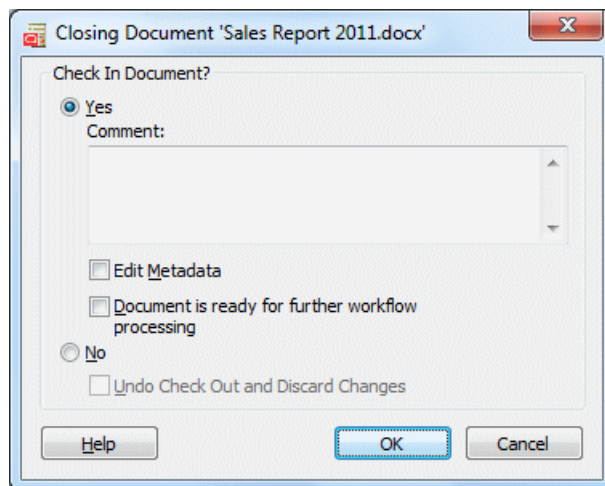
A.15 Check In Document Dialog

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 opens (see [Section A.16, "Save Changes and Check In Document Dialog"](#)).

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 Check In Document Dialog



Element	Description
Check In Document? (Yes/No)	<p>Select Yes if you want to check the document in to the content server as a new revision.</p> <p>Select No if you do not want to check the document in to the content server.</p>
Edit Metadata	<p>This check box is available only if the current file is checked out of an Oracle WebCenter Content Server instance, not an Oracle Content Database server or other WebDAV server.</p> <p>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 Section A.12, "Check In Content Dialog (Check In With Metadata)"). When you are ready, click OK in the Save dialog to submit the file to the content server.</p>
Document is ready for further workflow processing	<p>This check box is displayed only if the file is currently in a workflow and you were assigned editing privileges for this workflow item.</p> <p>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. For more information, see Section 13.3, "Approving or Rejecting Files in Workflows."</p> <p>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.)</p>
Undo Check Out and Discard Changes	<p>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.</p> <p>This check box is available only if the content item is currently checked out.</p>
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 WebCenter 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 Scenario	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 1	Yes	No	n/a	<p>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.</p> <p>After the file has been checked in to the content server, it is closed in the Microsoft Office application.</p>
Scenario 2	Yes	Yes	n/a	<p>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.</p> <p>After the file has been checked in to the content server, it is closed in the Microsoft Office application.</p>
Scenario 3	No	n/a	No	<p>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.</p> <p>The file is stored in a special cache on your local computer (see Section 9.5, "Local Caching of Content Files"). You can reopen the file from the Select Content dialog (see Section A.10.3, "Select Content: Offline Files") or using the Offline Content Manager.</p> <p>After the file has been saved to the local cache, it is closed in the Microsoft Office application.</p> <p>You should use the application's built-in save-as feature if you want to save the file in a different location than the local cache (that is, as an unmanaged file on your own computer).</p>
Scenario 4	No	n/a	Yes	<p>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.</p>

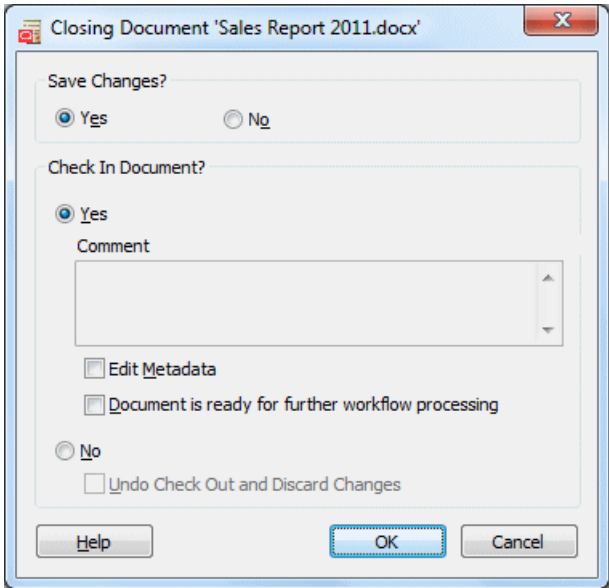
A.16 Save Changes and Check In Document Dialog

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 opens (see [Section A.15, "Check In Document Dialog"](#)).

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-21 Save Changes and Check In Document Dialog



Element	Description
Save Changes? (Yes/No)	<p>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.</p> <p>Select Yes if you want to save the changes you made.</p> <p>Select No if you want to discard the changes you made.</p>
Check In Document? (Yes/No)	<p>Select Yes if you want to check the document in to the content server as a new revision.</p> <p>Select No if you do not want to check the document in to the content server.</p> <p>You cannot check in the file if you choose not to save the changes.</p>
Comment	<p>Optionally, enter a comment that will be added to the checked-in content item (in the xComment metadata field). There may be a default comment if one has been defined. The maximum number of characters is set by the content server administrator (on the DesktopIntegrationSuite component configuration page).</p>
Edit Metadata	<p>This check box is available only if the current file is checked out of an Oracle WebCenter Content Server instance, not an Oracle Content Database server or other WebDAV server.</p> <p>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 Section A.12, "Check In Content Dialog (Check In With Metadata)"). When you are ready, click OK in the Save dialog to submit the file to the content server.</p>

Element	Description
Document is ready for further workflow processing	<p>This check box is displayed only if the file is currently in a workflow and you were assigned editing privileges for this workflow item.</p> <p>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. For more information, see Section 13.3, "Approving or Rejecting Files in Workflows."</p> <p>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.)</p>
Undo Check Out and Discard Changes	<p>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.</p> <p>This check box is available only if the content item is currently checked out.</p>
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 WebCenter 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 Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 1	Yes	Yes	No	n/a	<p>Any unsaved changes to the document are saved, and the document is automatically checked in to the content server as a new revision of the existing content item, inheriting all metadata from the previous revision.</p> <p>After the document has been checked in to the content server, it is closed in the Microsoft Office application.</p>

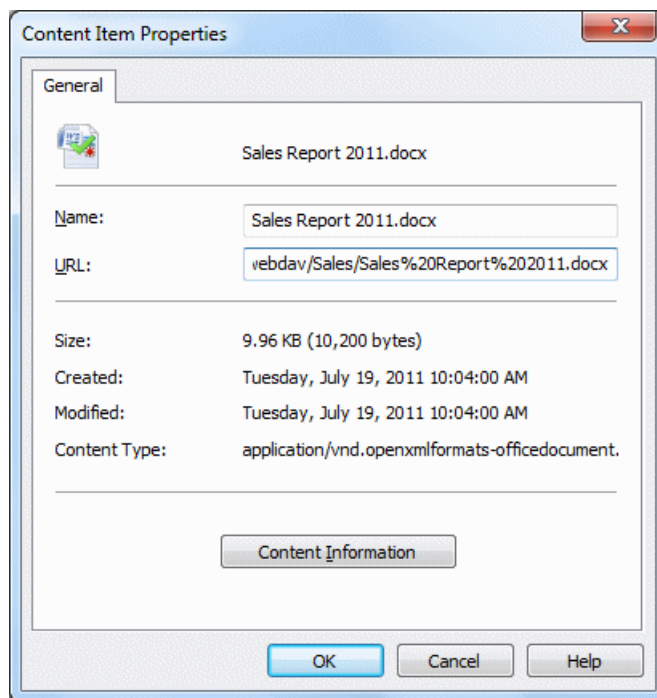
Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 2	Yes	Yes	Yes	n/a	<p>Any unsaved changes to the document are saved, and you are given the opportunity to modify the file's metadata before check-in. When you are done, the file is checked in to the content server as a new revision of the existing content item.</p> <p>After the document has been checked in to the content server, it is closed in the Microsoft Office application.</p>
Scenario 3	Yes	No	n/a	n/a	<p>Any unsaved changes to the document are saved, but the document is not automatically checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 11.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 10.11, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p> <p>You should use the application's built-in save-as feature if you want to save the file in a different location than the local cache (that is, as an unmanaged file on your own computer).</p>
Scenario 4	No	No	n/a	No	<p>The changes to the document are discarded and the document is not checked in to the content server; it remains checked out. This means that other users on the server cannot check out the file until you check it back in or undo the check-out.</p> <p>The file is stored in a special cache on your local computer. You can reopen and check in the document using the Check In option (see Section 11.8.1, "Checking In a Managed Document While Editing It"), or you can check it in from Windows Explorer (see Section 10.11, "Checking In Content Files").</p> <p>After the document has been saved to the local cache, it is closed in the Microsoft Office application.</p>

Save Scenario	Save Changes	Check In	Edit Metadata	Undo Check-Out	Action
Scenario 5	No	No	n/a	Yes	Any changes to the document are discarded and the document is closed. The checked-out status of the content item is cancelled on the server, which means that other users on the server can check out the file.

A.17 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-22 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.

Element	Description
Content Information	This button is displayed for servers of type 'WebCenter Content Server' only. 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.18 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 WebCenter 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–23 Content Query Capture Dialog

The screenshot shows a window titled "Specify Search Parameters" with a close button in the top right. Inside, there is a "Profile:" dropdown menu currently set to "Standard Search". Below this is a section titled "Content Query Capture" which contains a "Search Forms" dropdown menu, "Search" and "Reset" buttons, and a "Full-Text Search" section with an "Enter search terms" input field and an information icon. The "Metadata Search" section follows, containing several rows of search criteria: "Content ID" (Contains), "Title" (Contains), "Type" (Matches), "Security Group" (Matches), "Author" (Contains), "Release Date" (From/To with calendar icons), "Expiration Date" (From/To with calendar icons), "Comments" (Contains), and "Profile" (Matches). Each criterion has a dropdown menu and an input field. There are also two "No Selection" dropdown menus on the right side of the metadata search section.

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 WebCenter Content Server 11gR1 or Oracle Content Server 11gR1. They are not available for Oracle Content Server 10gR3. 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 WebCenter 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.19 Insert Content Item Dialog

The Insert Content Item dialog is used to select one or more files on an Oracle WebCenter Content Server instance for insertion into the current Microsoft Office document (Word, Excel, or PowerPoint). You search for files using the standard search features of the content server (browsing or criteria-based query, if available). This dialog comprises multiple panels, each representing a different item to insert:

- **Link:** This page enables you to select one or more files on a content server and insert hyperlinks to these files into the current Microsoft Office document. For more information, see [Section A.19.1, "Insert Content Item: Link."](#)
- **File:** This page enables you to select one or more files on a content server and insert the contents of these files into the current Microsoft Office document. For more information, see [Section A.19.2, "Insert Content Item: File."](#)
- **Image:** This page enables you to select one or more image files on a content server and insert these images into the current Microsoft Office document. For more information, see [Section A.19.3, "Insert Content Item: Image."](#)

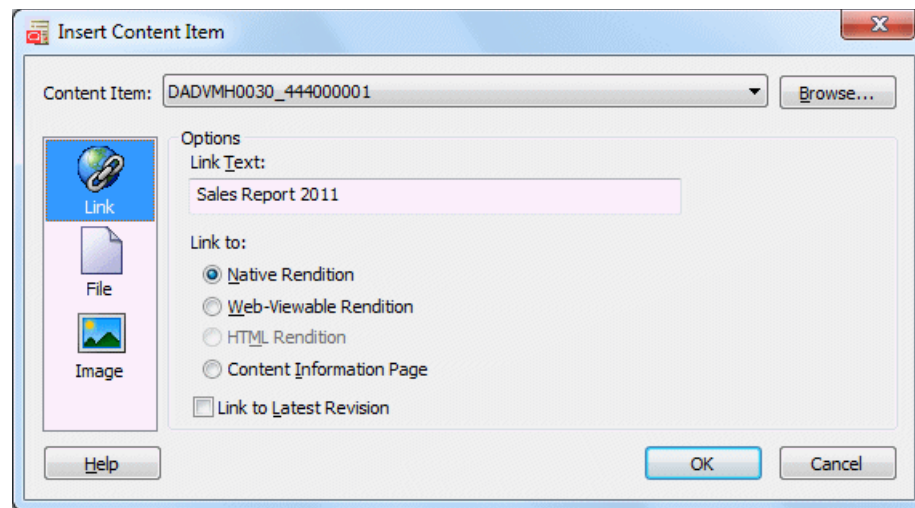
For more information, see also [Section 11.11, "Inserting Managed Content into Office Documents."](#)

Note: You cannot insert content items from Oracle Content Database servers or other WebDAV servers.

A.19.1 Insert Content Item: Link

The Link panel of the Insert Content Item dialog enables you to select one or more files on an Oracle WebCenter Content Server instance and insert hyperlinks to these files into the current Microsoft Office document. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For each selected content item, you can set the hyperlink text and also choose the file rendition and revision that the hyperlink should point to. The hyperlinks are inserted at the current cursor position in the document.

Figure A-24 Link Panel of Insert Content Item Dialog



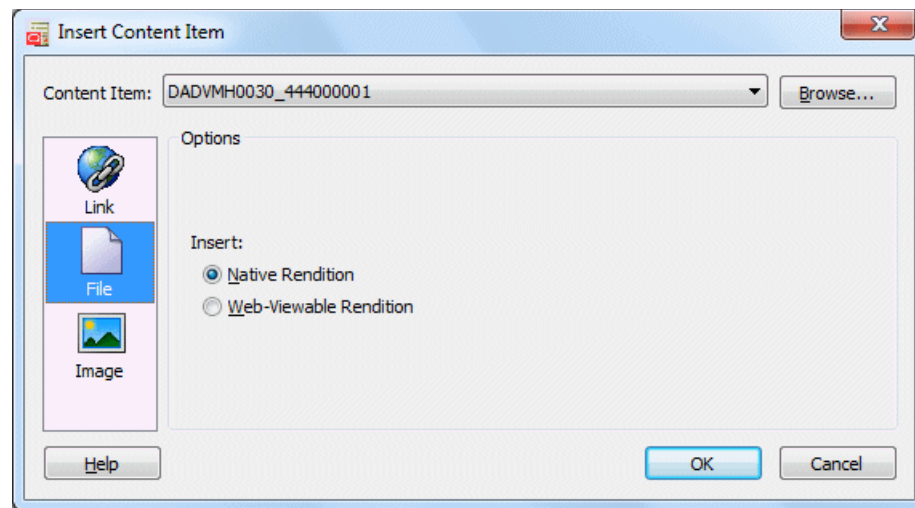
Element	Description
Content Item	This field shows the content ID of a selected file on a content server that the hyperlink will point to. If you selected multiple files, then you can use the dropdown list to review each selected item.
Browse	Click this button to open the Select Content dialog, where you can select one or more files on an Oracle WebCenter Content Server instance. You search for the file using the standard search features of the content server (browsing or criteria-based query, if available). For more information, see Section A.10, "Select Content Dialog."
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	<p>This lists all available file targets that the hyperlink can point to:</p> <ul style="list-style-type: none"> ■ Native Rendition: This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents). ■ Web-Viewable Rendition: This links to a version of the original file that can be viewed in a web browser. 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 WebCenter Content Server instance. The default is the alternate file, but server administrators may configure the content server to include other custom renditions of content items in this list.
Link to Latest Revision	<p>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.</p> <p>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.</p>
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and insert hyperlinks to the selected content items into the current Microsoft Office document.
Cancel	Click this button to close the dialog without doing anything.

A.19.2 Insert Content Item: File

The File panel of the Insert Content Item dialog enables you to select one or more files on an Oracle WebCenter Content Server instance and insert the contents of these files into the current Microsoft Office document at the current cursor position. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For each selected content item, 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-25 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. If you selected multiple files, then you can use the dropdown list to review each selected item.
Browse	<p>Click this button to open the Select Content dialog, where you can select one or more files on an Oracle WebCenter Content Server instance. You search for files using the standard search features on the content server (browsing or criteria-based query, if available). For more information, see Section A.10, "Select Content Dialog."</p> <p>When browsing to files on the content server, you will, by default, only see files of formats that are appropriate for the current Office application (for example, *.doc, *.docx, *.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 files whose formats are compatible with the current Office application (for example, native word-processing or text files when you are in Microsoft Word).</p>

Element	Description
Insert	<p>This lists all available file targets whose content can be inserted in the current Microsoft Office document:</p> <ul style="list-style-type: none"> Native Rendition: This inserts the contents of the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents). Web-Viewable Rendition: This 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 WebCenter Content Server instance. The default is the alternate file, but server administrators may configure the content server to include other custom renditions of content items in this list. <p>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'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.</p> <p>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.</p> <p>If you want to insert an image, make sure that you go to the Image panel (see Section A.19.3, "Insert Content Item: Image") and select an image file there.</p>
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.

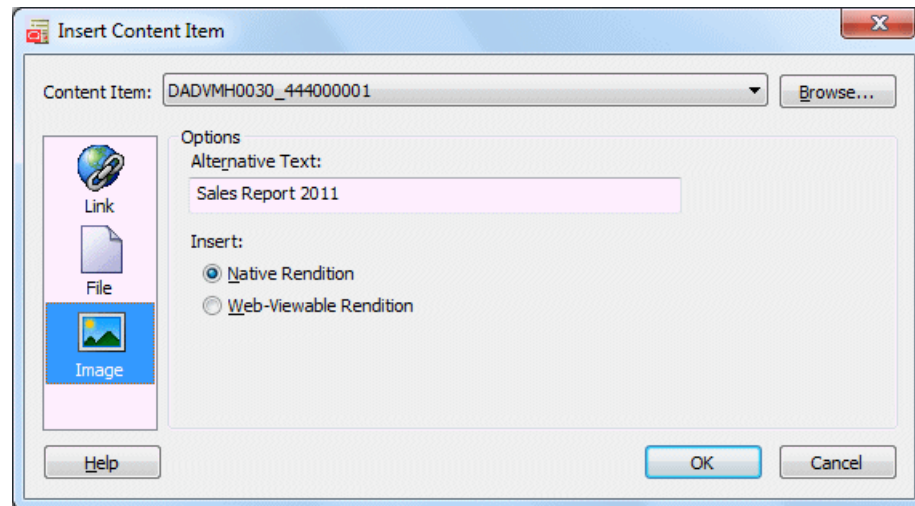
A.19.3 Insert Content Item: Image

The Image panel of the Insert Content Item dialog enables you to select one or more image files on an Oracle WebCenter Content Server instance and insert these images into the current Microsoft Office document. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For each selected content item, 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 images are inserted at the current cursor position in the Office document, in line with text.

Please note that the inserted images are not linked to their respective content items 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–26 Image Panel of Insert Content Item Dialog

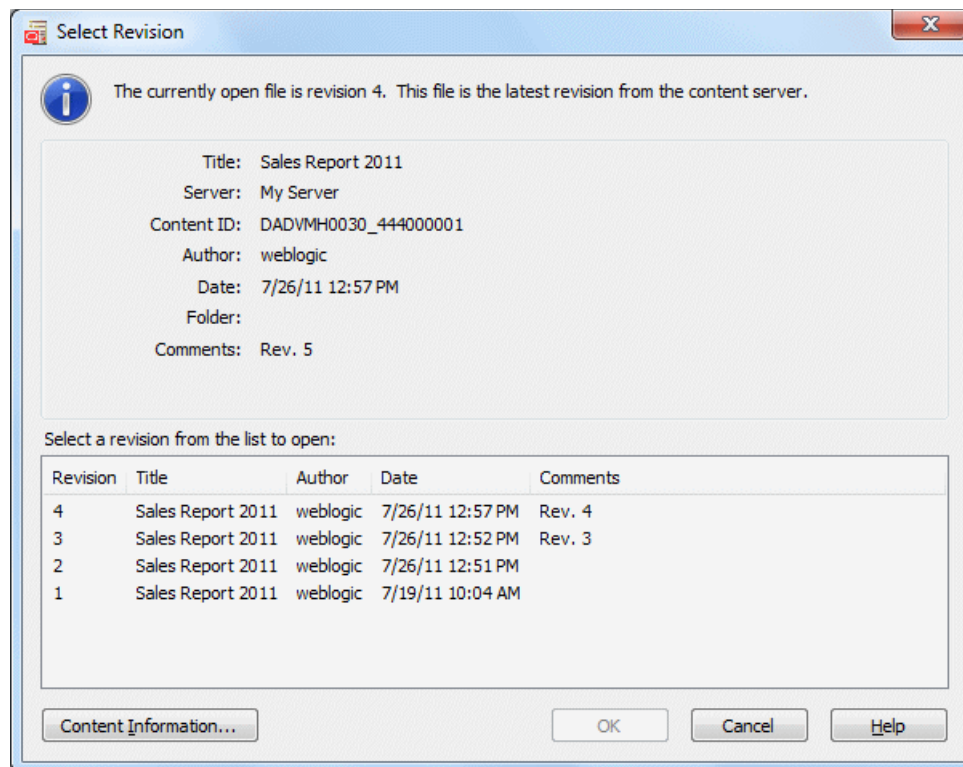


Element	Description
Content Item	This field shows the content ID of the selected image file on the content server that will be inserted in the current Microsoft Office document. If you selected multiple files, then you can use the dropdown list to review each selected item.
Browse	Click this button to open the Select Content dialog, where you can select one or more image files on an Oracle WebCenter Content Server instance. You search for files using the standard search features on the content server (browsing or criteria-based query, if available). For more information, see Section A.10, "Select Content Dialog."
Alternative Text	This is the alternative text for the selected 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	<p>This lists all available image file targets that can be inserted in the current Microsoft Office document:</p> <ul style="list-style-type: none">■ 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 WebCenter Content Server instance. The default is the alternate file, but server administrators may configure the content server to include other custom renditions of content items in this list.
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.20 Select Revision Dialog

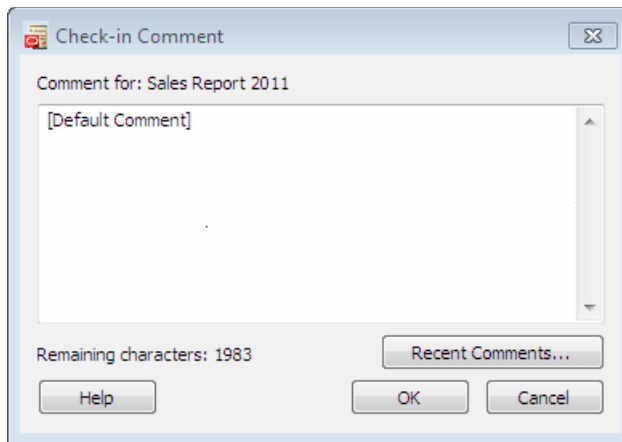
The Select Revision dialog enables you to select a revision of a Microsoft Office document on the content server that you want to open in the application or compare with the revision of that document that is currently open in Microsoft Word.

Figure A–27 Select Revision Dialog

Element	Description
Content information area	This area provides metadata information about the current content item revision, such as the title, content ID, author, folder location, and so on.
Revision history	This list shows all existing revisions of the current content item, along with their title, author, release date, and comments. You can select any revision from the list.
Content Information...	Click this button to open the content information page of the selected content item revision.
OK	Click this button to close the dialog and open the selected content item revision in the Office application or compare it with the document revision currently open in Microsoft Word.
Cancel	Click this button to close the dialog without doing anything.
Help	Click this button to display context-sensitive help information for this dialog.

A.21 Check-in Comment Dialog

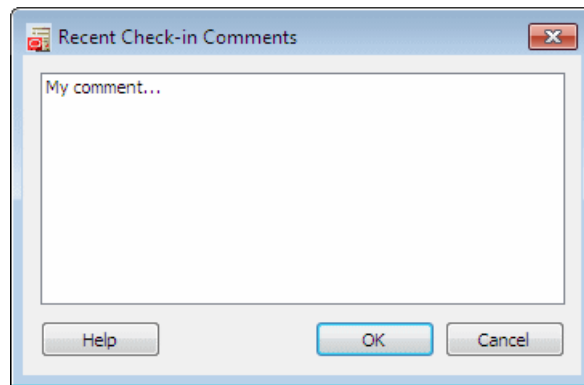
The Check-in Comment dialog enables you to add a comment to a file that is about to be checked in. You can enter a new comment or reuse or edit one that was recently added to a managed content item.

Figure A–28 Check-in Comment Dialog

Element	Description
Comment entry box	Enter a comment that will be added to the checked-in content item (in the xComment metadata field). There may be a default comment if one has been defined. The maximum number of characters is set by the content server administration (on the DesktopIntegrationSuite component configuration page).
Recent Comments...	Click this button to open the Recent Check-in Comments dialog, where you can see a list of comments that were recently added to documents and re-use them. See Section A.22, "Recent Check-in Comments Dialog."
Remaining characters	This shows the number of characters that you can still enter for the current comment. The maximum number of characters is set by the content server administrator (on the DesktopIntegrationSuite component configuration page). The default is 2,000 characters.
Help	Click this button to display context-sensitive help information for this dialog.
OK	Click this button to close the dialog and use the current comment as metadata of the checked-in item. If there was already comment assigned to the item, this will be replaced.
Cancel	Click this button to close the dialog without doing anything. The item will be checked in with the existing comment (or no comment if none was there already).

A.22 Recent Check-in Comments Dialog

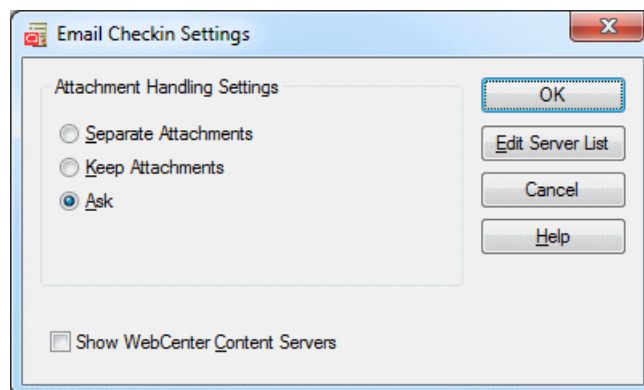
The Recent Check-in Comments dialog shows comments that were recently added to checked-in content items on your computer, in reverse chronological order (that is, the most recent is at the top). You can select a comment in the list and then use it for the file being checked in (as-is or after editing).

Figure A–29 Recent Check-in Comments Dialog

Element	Description
Recent comments list	This list shows comments that were recently added to checked-in content items on your computer, in reverse chronological order (that is, the most recent is at the top). Click on a comment to select it.
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 recent comment in the Check-in Comment dialog (see Section A.21, "Check-in Comment Dialog"), where you can reuse it as-is or edit it before checking in the file.
Cancel	Click this button to close the dialog without doing anything. You will return to the Check-in Comment dialog.

A.23 Email Checkin Settings Dialog

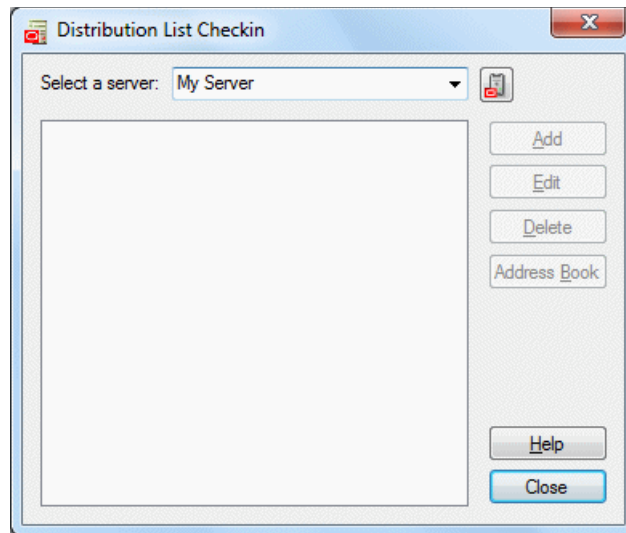
The Email Checkin Settings dialog enables you to set some configuration options for checking e-mail messages in to the content server. You can specify how e-mail attachments are handled, and also whether the integration folders should be shown in the folders list of your e-mail client.


Figure A–30 Email Checkin Settings Dialog

Element	Description
Attachment Handling Settings	<p>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:</p> <ul style="list-style-type: none"> ■ 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. <p>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 content folder. In that case, e-mail is always checked in with its attachments embedded, regardless of this setting.</p>
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 Section A.4, "Edit Server List Dialog"), 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.
Show WebCenter Content Servers	<p>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).</p> <p>You must restart your e-mail application for the integration hierarchy to be displayed. You will see a folder called WebCenter Content Servers at the bottom of the folders pane in your e-mail application. For more information, see Chapter 5, "Integration into E-mail Clients."</p>

A.24 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 WebCenter Content Server instance, and you can add, edit, or delete distribution lists.

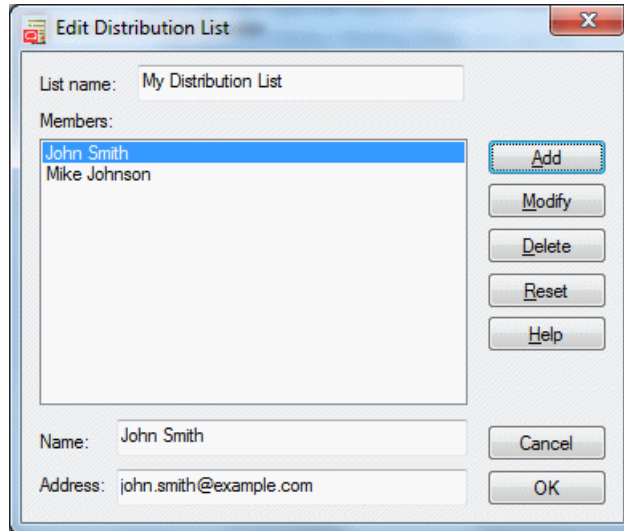
Figure A–31 *Distribution List Checkin Dialog*

Element	Description
Select a server	<p>This list includes all defined Oracle WebCenter Content Server connections on your computer. You can switch between content servers by selecting a different item on the list.</p> <p>Please note that the list of available servers only includes Oracle WebCenter Content Server instances; it does not show any Oracle Content Database servers or other WebDAV servers.</p> <p>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).</p>
	<p>Click this button to open the Edit Server List dialog (see Section A.4, "Edit Server List Dialog"), where you can manage your defined content server connections.</p>
Distribution list area	<p>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.</p>
Add	<p>Click this button to open the Edit Distribution List dialog (see Section A.25, "Edit Distribution List Dialog"), where you can define a new distribution list.</p>
Edit	<p>Click this button to open the Edit Distribution List dialog (see Section A.25, "Edit Distribution List Dialog"), where you can edit the selected distribution list.</p>
Delete	<p>Click this button to delete the selected distribution list.</p>
Address Book	<p>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. For more information, see Section A.26, "Check In Distribution List From Address Book Dialog."</p>
Help	<p>Click this button to display context-sensitive help information for this dialog.</p>
Close	<p>Click this button to close this dialog and submit any changes you made.</p>

A.25 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–32 *Edit Distribution List Dialog*



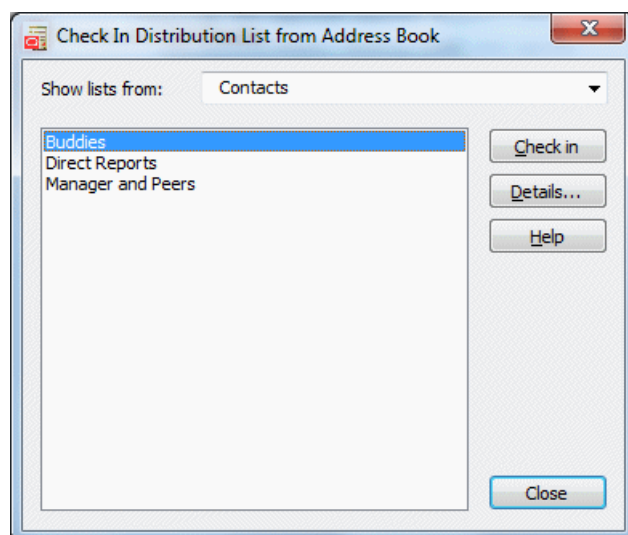
Element	Description
List name	This field shows the name of the currently selected e-mail distribution list. You cannot edit this information. If you want to manage a different e-mail distribution list, click Cancel to close this dialog and select the correct distribution list in the Distribution List Checkin dialog (see Section A.24, "Distribution List Checkin Dialog").
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.

Element	Description
OK	Click this button to submit any changes you made, close this dialog, and open a check-in form for the distribution list.

A.26 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–33 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.

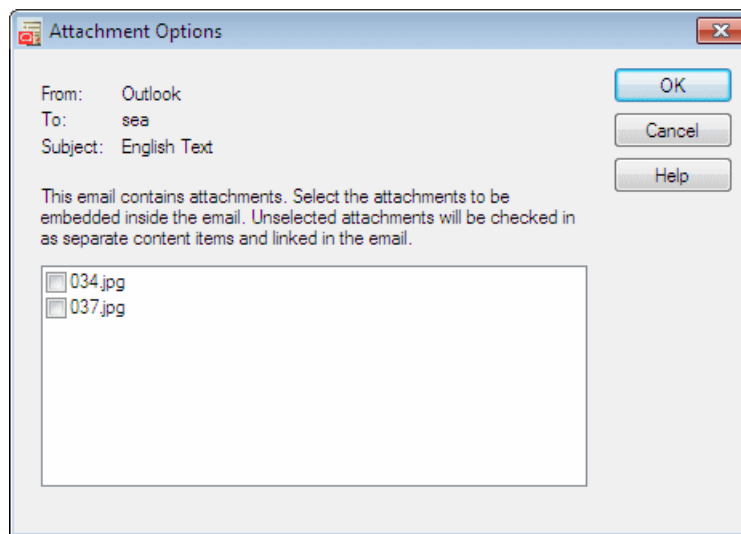
A.27 Attachment Options Dialog

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 WebCenter 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 [Section A.23, "Email Checkin Settings Dialog"](#)).

Figure A-34 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.28 Get Attachment Dialog

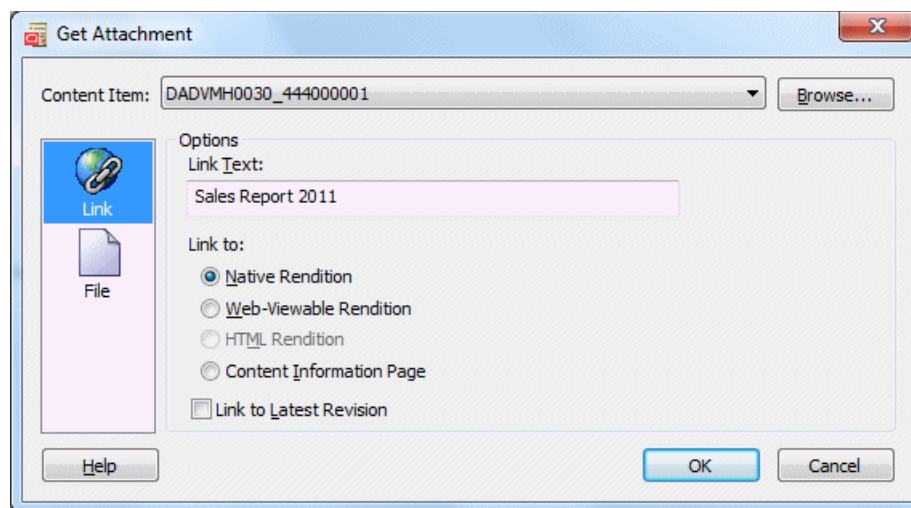
The Get Attachment dialog is used to retrieve one or more files from an Oracle WebCenter Content Server instance and attach them to the current e-mail message. This dialog comprises multiple panels, each representing a different item to attach to the e-mail:

- **Link:** This page enables you to select a file on a content server and attach it to the current e-mail message. For more information, see [Section A.19.1, "Insert Content Item: Link."](#)
- **File:** This page enables you to select a file on a content server and attach it to the current e-mail message. For more information, see [Section A.19.2, "Insert Content Item: File."](#)

A.28.1 Get Attachment: Link Panel

The Link panel of the Get Attachment dialog enables you to select one or more files on an Oracle WebCenter Content Server instance and insert hyperlinks to these files into the current e-mail message in your e-mail application. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For each selected content item, you can set the hyperlink text and also choose the file rendition and revision that the hyperlink should point to. The hyperlinks are inserted at the current cursor position in the e-mail message.

Figure A-35 Link Panel of Get Attachment Dialog



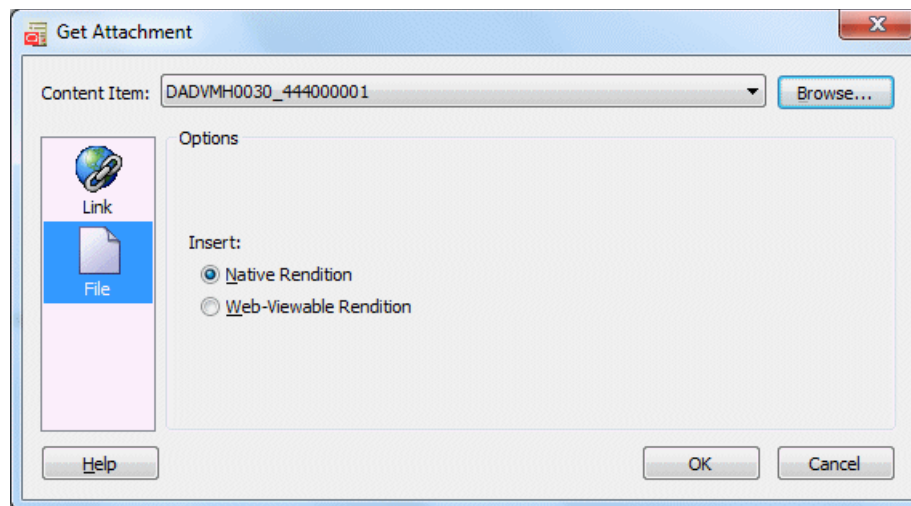
Element	Description
Content Item	This field shows the content ID of a selected file on the content server that the hyperlink will point to. If you selected multiple files, then you can use the dropdown list to review each selected item.
Browse	Click this button to open the Select Content dialog, where you can select one or more files on a content server. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For more information, see Section A.10, "Select Content Dialog."

Element	Description
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.
Link to	This lists all available file targets that the hyperlink can point to: <ul style="list-style-type: none"> ■ Native Rendition: This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents). ■ Web-Viewable Rendition: This links to a version of the original file that can be viewed in a web browser. 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 WebCenter Content Server instance. The default is the alternate file, but server administrators may configure the content server to include other custom renditions of content items in this list.
Link 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 hyperlinks to the selected content items into the current e-mail message Office document.
Cancel	Click this button to close the dialog without doing anything.

A.28.2 Get Attachment: File Panel

The File panel of the Get Attachment dialog enables you to select one or more files on an Oracle WebCenter Content Server instance and attach these files to the current e-mail message. You search for files using the standard search features of the content server (browsing or criteria-based query, if available). For each selected content item, you can choose the file rendition that should be attached (native or web-viewable).

Figure A-36 File Panel of Get Attachment Dialog

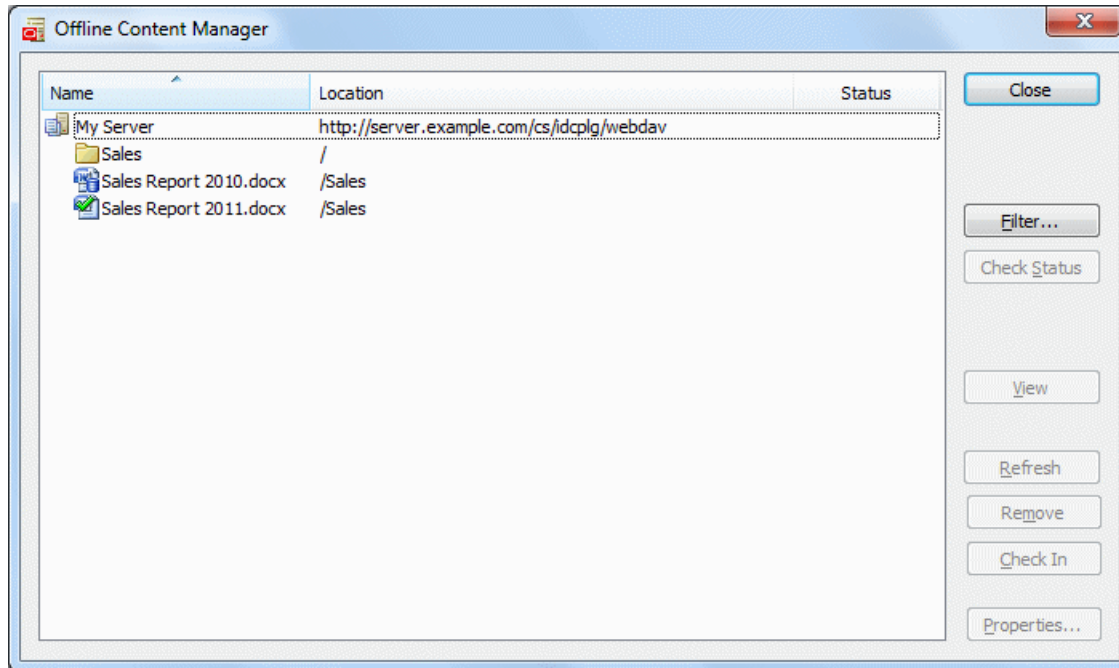


Element	Description
Content Item	This field shows the content ID of the selected file on the content server that will be attached to the current e-mail message. If you selected multiple files, then you can use the dropdown list to review each selected item.
Browse	Click this button to open the Select Content dialog, where you can select one or more files on a content server. You search for files using the standard search features on the content server (browsing or criteria-based query, if available). For more information, see Section A.10, "Select Content Dialog."
Insert	This lists all available file targets whose content can be attached to the current e-mail message: <ul style="list-style-type: none"> ▪ Native Rendition: This links to the native file; that is, the original file as created in its associated application (for example, .doc or .docx files for Microsoft Word documents). ▪ Web-Viewable Rendition: This links to a version of the original file that can be viewed in a web browser. 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 WebCenter Content Server instance. The default is the alternate file, but server administrators may configure the content server to include other custom renditions of content items in this list.
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 items to the current e-mail message.
Cancel	Click this button to close the dialog without doing anything.

A.29 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–37 Offline Content Manager

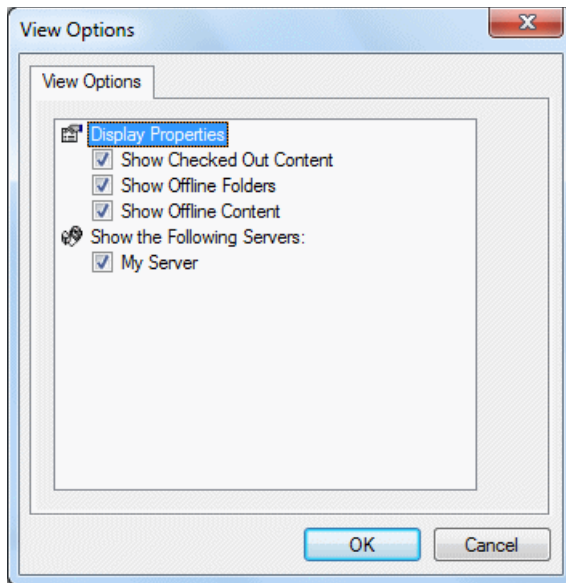


Element	Description
List of offline content	This list shows all files and folders that are currently in your offline cache, grouped by content server, along with their location and status. You can right-click any of the items in the list to see relevant content management tasks (which can also be performed using the buttons to the right of the list). For more information, see Section 14.7.4, "Performing Content Management Tasks on Offline Content." Files in the offline content list show their content management status as overlays on their application icons. For more information, see Section 9.7, "Content File Status."
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. For more information, see Section A.30, "View Options Dialog."

Element	Description
Check Status	<p>Click this button to check the current status of the selected folder or file. Desktop 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.)</p> <p>If an item no longer exists on the content server, you will be given the opportunity to remove it from the offline content list.</p>
View	<p>Click this button to open the selected content file in its associated application in read-only mode. For more information, see Section 10.8, "Viewing Content Files."</p>
Refresh	<p>Click this button to refresh the selected offline folder or file.</p> <p>If you refresh an offline file, the offline copy in your local cache is updated to the latest released version on the content server.</p> <p>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. For more information, see Section 14.2, "Making Folders and Files Available Offline."</p>
Remove	<p>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.</p>
Check In	<p>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.</p>
Properties...	<p>Click this button to show the properties dialog for the selected folder or file. For more information, see Section A.31, "Offline Folder Properties Dialog," or Section A.32, "Offline Content Item Properties Dialog."</p>

A.30 View Options Dialog

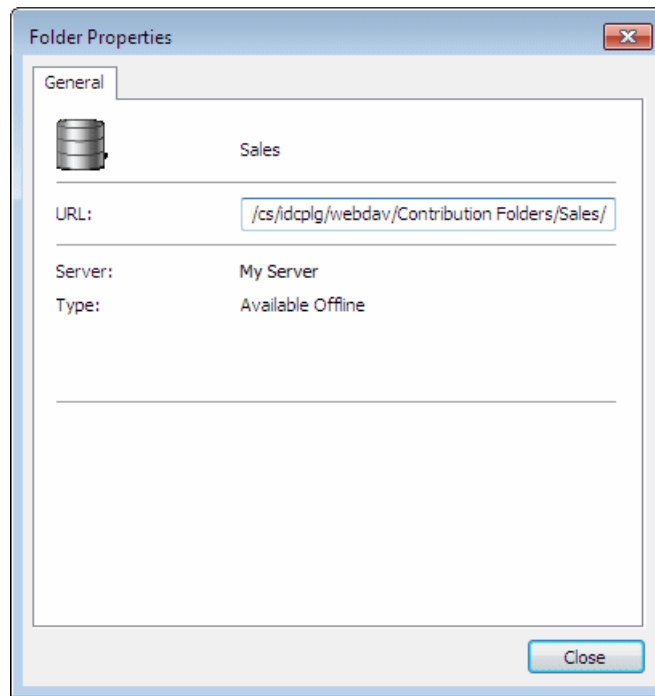
The View Options dialog enables you to filter the offline content list to show only certain types of offline content or content from certain servers.

Figure A-38 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. For more information, see Section 14.2, "Making Folders and Files Available Offline."
Show Offline Content	Select this check box to show all content files marked to be available offline in the list. For more information, see Section 14.2, "Making Folders and Files Available Offline."
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.31 Offline Folder Properties Dialog

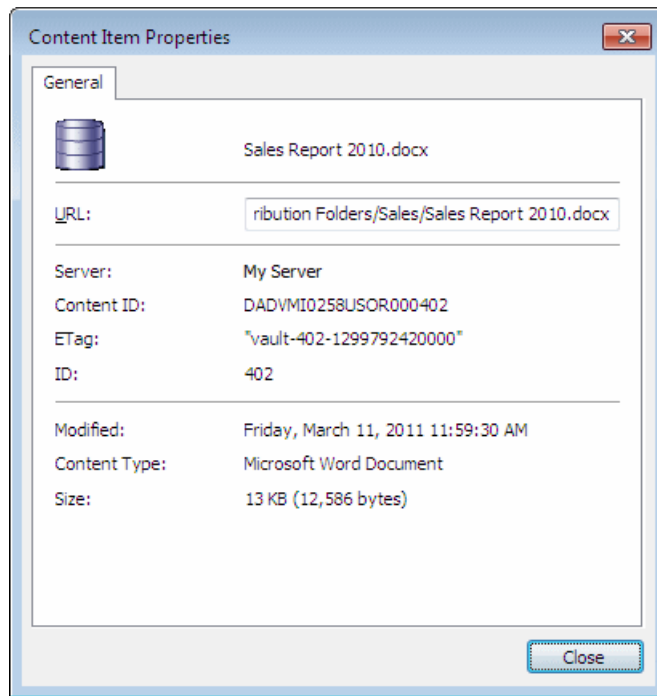
The Folder Properties dialog shows a number of properties of an offline content folder. It resembles the standard folder properties dialog in Windows, but includes some additional elements specific to offline content folders. You cannot modify any of the information in this dialog.

Figure A–39 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 'WebCenter Content Server' only. Click this button to open the Hierarchical Folder Information page, which shows a number of content management properties of the offline content folder. For more information, see Section A.8, "Folder Information page."
Close	Click this button to close this dialog.

A.32 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-40 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 determine changes to files.
ID	This is a unique identifier of the current revision of the offline content file on Oracle WebCenter 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 'WebCenter Content Server' only. Click this button to open the standard content information page for the offline file, as retrieved from the content server.
Close	Click this button to close this dialog.

Advanced Client Configuration

This section covers these topics:

- [Section B.1, "Setting Windows Explorer Integration Options"](#)
- [Section B.2, "Changing the Location of the Local File Cache"](#)
- [Section B.3, "Disabling Overriding the Default Content Profile Selection"](#)

Important: This section deals with advanced configuration on your computer. Make sure that you consult with your system administrator to verify you are allowed to perform the tasks in this section.

Note: For administrative Desktop tasks, see *Managing Oracle WebCenter Content*.

B.1 Setting Windows Explorer Integration Options

Desktop offers a number of advanced configuration options that enable you to fine-tune the way it works with Windows Explorer on your computer. To see the advanced options dialog, do the following:

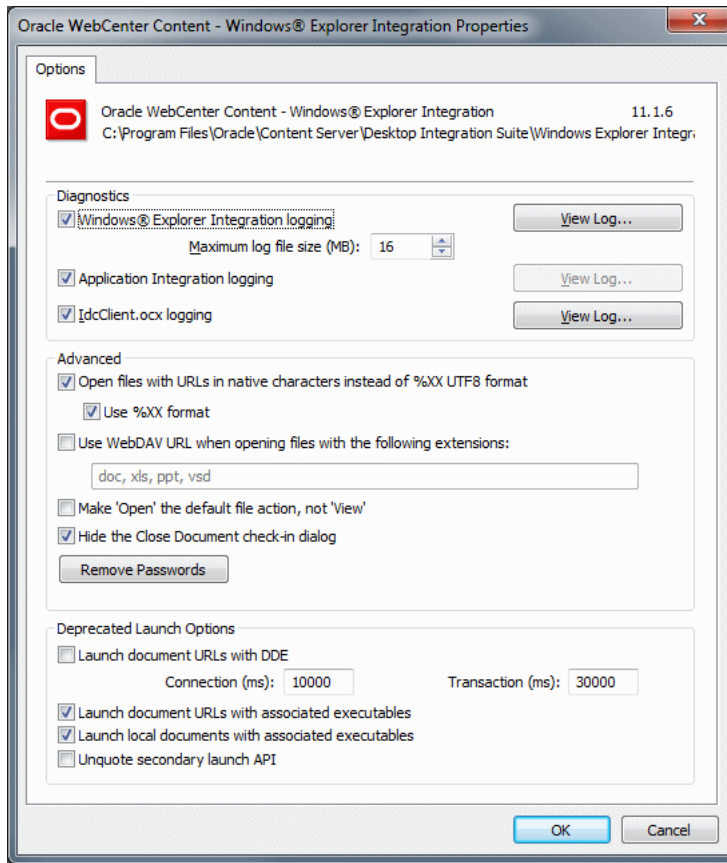
- **Windows 7 and Windows Vista:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list (not in your favorites list!) while simultaneously holding the Shift and Ctrl keys.

Note: Make sure all folders are shown in Windows Explorer (which is not the default): click **Tools**, then **Folder Options**, then **General**, and then **Show all folders**.

- **Windows XP:** Open Windows Explorer and then right-click the **WebCenter Content Servers** item in the folders list while simultaneously holding the Shift and Ctrl keys. Alternatively, Shift+Ctrl+right-click the **WebCenter Content Servers** icon on the Windows desktop.

The context menu now includes an option called **Properties....** Choose this option to open the Windows Explorer Integration Properties dialog ([Figure B-1](#)).

Figure B-1 Windows Explorer Integration Properties Dialog



Important: Modify these settings only if you know what you are doing or if specifically instructed to do so, for example by an Oracle support engineer. Changing these settings may break your Desktop client installation!

Note: Your system administrator may have set up your computer to prevent you from making any changes to the configuration settings in this dialog. If that is the case, you can change a setting, but the changes will not "stick" after you click OK.

Element	Description
Windows Explorer Integration logging	Select this check box if you want errors that occur during software execution to be written to a log file. This may be useful for troubleshooting and diagnostic purposes. The log file is called WebDAVClient.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable).
Maximum log file size (MB)	Specify the maximum file size that the Windows Explorer integration log file is allowed to have (in megabytes). Once the log file exceeds this size limit, it is deleted and a new log file is started.

Element	Description
Application Integration logging	Select this check box if you want normal Desktop operations, such as program calls and the like, to be written to a log file. This can be useful for troubleshooting and diagnostic purposes. The log file is called DIS_Log.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable). There is no size limit to this log file other than any dictated by the file system.
IdcClient.ocx logging	Select this check box if you want the IdcClient operations to be written to a log file. This can be useful for troubleshooting and diagnostic purposes. The IdcClient handles communications with content servers. The log file is called IdcClient.log, and it is located in the Windows temp directory (as defined by the %TEMP% system variable). There is no size limit to this log file other than any dictated by the file system.
View Log...	Click any of these buttons to view their associated log file.
Open files with URLs in native characters instead of %XX UTF8 format	Select this check box if you want URLs to be encoded in the operating system's native encoding (for example, Big-5) rather than Unicode.
Use %XX format	Select this check box to encode all URL bytes in the %XX escaped format, except for the following characters: a-z A-Z 0-9 ! # \$ & ' () + - . ; = _.
Use WebDAV URL when opening files with the following extensions	Select this check box if you want files with the specified file extensions to be opened via WebDAV rather than downloading them and then opening them from the offline cache. In other words, the WebDAV URL is provided to the application, so that it acts as a WebDAV client. Use commas to separate the file extensions.
Make 'Open' the default file action, not 'View'	Select this check box if you want a content file on a server to be opened rather than viewed when you select it in the integration hierarchy in Windows Explorer and press Enter or double-click it. Please note that local copies of managed documents always open in full edit mode regardless of this setting. For a comparison of the 'view' and 'open' actions, see Section 9.6, "Content Management Actions on Files."
Hide the Close Document check-in dialog	Select this check box if you do not want to see the special close dialog for managed documents in Microsoft Office applications (see Section 4.4, "Close Dialog"). Instead, managed documents are saved in much the same way as unmanaged Office documents ("Do you want to save the changes?").
Remove Passwords	Click this button to remove the cached passwords for all content server connections on your computer. This forces a login prompt the next time you connect to a server, which may be useful if the incorrect login credentials were inadvertently cached for a content server.
Launch document URLs with DDE	Select this check box to attempt to open URLs using a DDE transaction instead of a ShellExecute API call. The connection and transaction are timeout values (in milliseconds) that help to ascertain if the DDE conversation has succeeded.
Launch document URLs with associated executables	Select this check box to issue a call to ShellExecute using the document's associated executable as the exe and the URL as the document argument. (This is done for URLs.)

Element	Description
Launch local documents with associated executables	Select this check box to issue a call to ShellExecute using the document's associated executable as the exe and the file path as the document argument. (This is done for files on the file system; that is, those that are checked out and cached locally on the disk.)
Unquote secondary launch API	Select this check box to call ShellExecute without the document path surrounded by quotes.
OK	Click this button to close this dialog and submit any changes you made.
Cancel	Click this button to close this dialog and cancel any changes you made.

B.2 Changing the Location of the Local File Cache

Desktop uses temporary storage cache on the file system of client computers. For more information, see [Section 9.5, "Local Caching of Content Files."](#) By default, this storage cache is located in the following directory:

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

However, this may not comply with your organization's standards for where data should be stored on client computers. To accommodate for this, you can use the following Windows Registry keys to modify the location of the temporary storage cache on a client computer (the paths below are examples):

Important: Check with your system administrator whether you are allowed to make changes to the Windows registry. Also, changing the registry, if done incorrectly, may affect the stability of your computer. Do not edit the Windows registry unless you are confident about doing so.

```
[HKEY_CURRENT_USER\Software\Oracle\Universal Content Management\Desktop
Integration Suite\WebDAV]
"Syndication Dir"="H:\Application Data\SyndicationCache"
```

Please note the following:

- The AppData structure in Windows Vista and Windows 7 is hidden by default. You must enable the option to view hidden folders in Windows Explorer.
- This registry value is not included by default; you must add it manually.
- The registry value is a string value.
- Any files already in the offline cache are not automatically moved from the old to the new location. It is therefore recommended that you empty your offline cache before changing its location. For more information, see [Section 14.7, "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 this registry key affects the offline cache location for *all* defined server connections. You cannot change the cache location setting for individual content servers. However, the settings are user-specific, so if there are multiple user accounts on the computer, the settings apply to the current user only.
- Your system administrator may have disabled the ability to make changes to the Desktop configuration settings on your computer.

B.3 Disabling Overriding the Default Content Profile Selection

If you are prompted to provide metadata when dragging and dropping or copying and pasting a new file into a folder that has a default content profile assigned to it, you can normally change that profile in the content check-in dialog (see [Section A.14, "Check In Content Dialog \(Metadata Prompt\)"](#)).

You can use the following Windows Registry key to disable the ability to override the default content profile selection:

```
[HKEY_CURRENT_USER\Software\Oracle\Universal Content Management\Desktop  
Integration Suite]  
"Metadata Prompts Allow Any Profile"=dword:00000000
```

Important: Check with your system administrator whether you are allowed to make changes to the Windows registry. Also, changing the registry, if done incorrectly, may affect the stability of your computer. Do not edit the Windows registry unless you are confident about doing so.

Please note the following:

- This registry value is not included by default; you must add it manually.
- The registry value is a dword value.
- Setting the value to '0' prevents you from changing the default content profile selection in the content check-in dialog. The default value is '1'.
- If you are using 32-bit Microsoft Office on 64-bit Windows, you do not need to use Wow6432Node.
- Your system administrator may have disabled the ability to make changes to the Desktop configuration settings on your computer.

Uninstalling the Desktop Client Software

This section covers these topics:

- [Section C.1, "Uninstalling the Desktop Client Software Completely"](#)
- [Section C.2, "Uninstalling Individual Desktop Components"](#)

C.1 Uninstalling the Desktop Client Software Completely

To completely uninstall the Desktop client software:

Note: Make sure that you hide the WebCenter Content Servers hierarchy in Lotus Notes prior to uninstalling the Desktop client software (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)). If you do not, you will continue to see the WebCenter 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 WebCenter Content: Desktop**.
4. Do the following, depending on your operating system:
 - Windows XP: Click **Remove**.
 - Windows Vista and Windows 7: Right-click and choose **Uninstall**.

The Desktop uninstall wizard is launched.
5. Click **Yes** when asked if you are sure that you want to remove the Desktop client software from your computer.

The software is removed from the client computer.
6. Restart your computer.

Considerations

Please note the following:

- If you reinstall the Desktop client software (for example, during an upgrade), any server connections that you set up earlier will continue to be available after reinstalling the software.
- Uninstalling the Desktop client software from your computer will not remove any Oracle WebCenter Content search providers from your web browsers.

C.2 Uninstalling Individual Desktop Components

To uninstall individual Desktop components:

Note: Make sure that you hide the WebCenter Content Servers hierarchy in Lotus Notes prior to uninstalling the Desktop client software (see [Section 5.5, "Showing or Hiding the WebCenter Content Servers Hierarchy"](#)). If you do not, you will continue to see the WebCenter 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 WebCenter Content: Desktop**.
4. Click **Change** to start the Desktop install wizard.
5. Go through the installation procedure (see [Section 2.5, "Installing the Latest Version of the Desktop Client Software"](#)) and unselect the application(s) that you no longer want to integrate with Content Server.
6. Restart your computer.

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