

Oracle® Cloud

Collaborating on Documents with Oracle Content Management



F24095-64
September 2023



Oracle Cloud Collaborating on Documents with Oracle Content Management,

F24095-64

Copyright © 2019, 2023, Oracle and/or its affiliates.

Primary Author: Bruce Silver

Contributing Authors: Sarah Bernau, Ron van de Crommert

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Audience	ix
Documentation Accessibility	ix
Diversity and Inclusion	ix
Related Resources	ix
Conventions	x

1 Get Started

Overview of Oracle Content Management	1-1
Access Oracle Content Management	1-2
Understand Roles	1-2
Manage Assets	1-3
Collaborate on Documents	1-3
Build Sites	1-3
Integrate and Extend Oracle Content Management	1-4
Get Started	1-4
Key Concepts	1-5
Files and Folders	1-5
User Roles	1-6
Data Security	1-7
Synchronization	1-7
Mobile Apps	1-8
Sharing	1-9
Conversations	1-11
Annotating and Reviewing	1-12
Groups	1-13
Sign Up and Sign In	1-14
Learn About User Roles	1-14
Download the Apps	1-15
Supported Languages, Devices, and Software	1-16
Keyboard Shortcuts	1-17
Global Keyboard Shortcuts	1-17

Document View Keyboard Shortcuts	1-17
Calendar Keyboard Shortcuts	1-17
Content Type Editor Keyboard Shortcuts	1-18
Conversation Keyboard Shortcuts	1-18
Message List Keyboard Shortcuts	1-18
Posting or Replying Keyboard Shortcuts	1-19
Adding Annotations Using Keyboard Shortcuts	1-19
Icon Quick Reference	1-19
Web Client Icons	1-20
Mobile App Icons	1-21
Desktop Icons	1-21
Digital Asset Icons	1-22
Microsoft Radial Menu	1-23
Service Accessibility	1-23
Support	1-23

2 Manage Your Files and Folders

Get to Know the Documents Page	2-1
Work with Your Files and Folders	2-3
Customize Your Profile and Preferences	2-8
View Files	2-9
Upload Files	2-11
Download Files	2-12
Extract Multiple Files From A Compressed File	2-13
Search Content and Conversations	2-14
Lock a File	2-15
Edit a File	2-15
Use Metadata	2-16
Use Assets	2-16
Share Files and Folders	2-17
Use Conversations	2-17
Use Workflows	2-17

3 Work with the Desktop App

Set Up Local File Sync	3-2
Sync Subfolders and Files	3-4
Install and Configure the Desktop App	3-4
Set Notifications and Preferences	3-5
Sync Your Files	3-7

Sync Files in Multiple Accounts	3-9
Work with Synced Files	3-9
Share Files and Folders	3-12
Use Conversations	3-13

4 Work with Microsoft Office

Create Microsoft Office Files in the Web Client	4-1
Edit Microsoft Office Files	4-2
Use the Radial Menu	4-3
Add Links Using Microsoft Outlook	4-3
Disable the Desktop Add-In for Microsoft Outlook	4-4
Use Oracle Content as a Storage Option	4-5

5 Work with Oracle Content Management for Slack

Invoke the Oracle Content Management for Slack App	5-1
Authorize and Allow Slack and Oracle Content Management Access	5-3
Post Links to Oracle Content Management in Slack	5-3
Share Links from Oracle Content Management to Slack Channels	5-6

6 Work with Sauce Video

7 Use the Mobile Apps

Use the Android Mobile App	7-1
Get to Know the Android Mobile App	7-2
Sign In or Out	7-4
Set a Passcode	7-4
Access Multiple Oracle Content Accounts	7-5
Manage Notifications	7-5
Work with Files and Folders	7-5
View Files or File and Folder Details	7-7
Edit Files	7-8
Upload Files and Media	7-8
Download (Sync) Files	7-9
Search Content and Conversations	7-10
Use Assets	7-11
Share Files and Folders	7-12
Use Conversations	7-12
Use the iPhone/iPad Mobile App	7-13

Get to Know the iPhone/iPad Mobile App	7-14
Sign In or Out	7-16
Set a Passcode	7-16
Access Multiple Oracle Cloud Accounts	7-17
Manage Notifications	7-17
Work with Files and Folders	7-17
View Files or File Details	7-20
Edit Files	7-20
Upload Files or Media	7-21
Download Files or Media	7-22
Search Content and Conversations	7-23
Use Assets	7-24
Share Files and Folders	7-25
Use Conversations	7-26

8 Share Files and Folders

Sharing Overview	8-1
Roles	8-2
Shared Folder Permissions	8-3
Public vs. Members-Only Links	8-4
Share Files	8-5
Share Folders	8-6
Create Folder Links	8-6
Configure Access to Links	8-7
Add Folder Members	8-7
Add External Users	8-7
Stop Sharing	8-8
Check File Access History	8-8
Recover a Deleted File in a Shared Folder	8-9
Sharing Tips	8-9

9 Use Conversations

Conversations Overview	9-1
Get to Know the Conversations Page	9-3
Filter or Sort Conversations	9-5
Start a Conversation	9-5
Add or Remove People in a Conversation	9-5
Add or Remove Files in a Conversation	9-7
Manage Your Conversations	9-8

Add Annotations	9-8
Add Links to Another Conversation	9-9
Use Flags	9-9

10 Use Groups

Groups Overview	10-1
Create or Delete a Group	10-2
Add People to a Group	10-3
Join or Leave a Group	10-3

11 Troubleshoot

Troubleshoot Web Browser	11-2
I can't sign in	11-3
I can't move or copy a file	11-3
I don't see digital assets or content items	11-3
I can't upload or download a file	11-4
I can't find my downloaded files	11-4
I can't create a folder	11-4
I exceeded my storage quota but I didn't think I had that many files	11-4
I need to edit a file but it's locked by someone else	11-5
I can't edit an Office 365 file online	11-5
I'm having trouble loading the software	11-5
I'm having trouble viewing a file or video	11-5
There are multiple version numbers after a file name but I only uploaded one version	11-5
I don't see the folders that I expected to see in my folder list	11-5
URLs copied from a spreadsheet don't paste correctly	11-6
I don't see the results I expected when searching	11-6
Troubleshoot the Desktop App and Sync	11-7
I can't sign in to the desktop app	11-7
I don't see a folder to sync or I can't find a synced file	11-7
PDF files created in a synced folder disappear	11-8
Links in my synced files aren't working	11-8
I have sync problems or slow syncing	11-8
I can't change an Oracle Content account folder location	11-9
Icons in an Oracle Content account folder don't show sync status	11-10
My files aren't compressed when I add them to a compressed folder	11-10
I can't check for updates	11-10
Files and folders in my Oracle Content folder are wrong or out of date	11-11
I can't work with a file on my desktop after I rename it	11-11

I exited or quit the desktop app and don't know what's happened to sync	11-11
I can't restore a folder I deleted	11-12
Troubleshoot Microsoft Office Add-On	11-12
Why are there two Oracle Content storage services when using Microsoft Office?	11-12
My Office add-in or Outlook add-in isn't working	11-12
Links in Outlook email on a Mac don't work as I expect	11-13
Troubleshoot Mobile	11-13
I need to reset my passcode	11-14
I can't view a file when I have Viewer rights in a shared folder	11-14
I can't view a file that I downloaded	11-14
I'm having trouble viewing a video	11-14
I can't find my downloaded files on my device	11-14
My file didn't sync in the Android app	11-15
I got an error when transferring a file during sync in the Android app	11-15
My edits don't appear in a file I synchronized on my Android device	11-15
What do I do if my device is lost or stolen?	11-15
Troubleshoot Sharing	11-16
I shared a folder with someone, but they can't use it the way I expected	11-16
Someone sent me a folder link, but I can't access the files there	11-16
I stopped sharing a folder and now the subfolders aren't shared	11-16
I have a link to a file or folder but it requires an access code	11-17
I can't get a public link to send to someone in a folder that's shared with me	11-17
Files are missing from one of my folders that I shared	11-17
I can't create a public link to a folder I own	11-17

Preface

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

Audience

This publication is intended for Oracle Cloud users who want to work with files using a web browser, via the desktop synchronization application, or a mobile device.

Documentation Accessibility

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

Access to Oracle Support

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

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- *Getting Started with Oracle Cloud*
- *Managing Assets with Oracle Content Management*
- *Building Sites with Oracle Content Management*
- *Developing with Oracle Content Management As a Headless CMS*
- *Administering Oracle Content Management*
- *Integrating and Extending Oracle Content Management*

- *What's New for Oracle Content Management*
- *Known Issues for Oracle Content Management*

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.
<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.

1

Get Started

Oracle Content Management is a cloud-based content hub where you manage your content quickly and easily.

- [What's New](#)
- [Take a quick tour of Oracle Content Management](#) (English only)
- [Overview of Oracle Content Management](#)
- [Key Concepts](#)
- [Sign Up and Sign In](#)
- [Manage Your Password](#)
- [Download the Apps](#)
- [Supported Languages, Devices, and Software](#)
- [Keyboard Shortcuts](#)
- [Icon Quick Reference](#)
- [Service Accessibility](#)
- [Support](#)

Overview of Oracle Content Management

Whether you need to manage digital assets, publishing to multiple channels in various languages, or oversee business documents gathered from a variety of sources, Oracle Content Management helps you throughout the entire content lifecycle. Create, capture, organize, review, and protect all your content as it flows through your organization with integrated processes and data. Oracle Content Management is a cloud-based content hub, offering scalability, security, and governance, so you can eliminate the typical inefficiencies in content management—including organizing and tagging new content and locating existing documents—and do more with fewer resources.

Using Oracle Content Management for digital asset management, you can rapidly collaborate internally and externally on any device to approve content and create contextualized experiences. Built-in business-friendly tools make building new web experiences with stunning content a breeze. You can drive digital engagement with all your stakeholders using the same content platform and the same processes. Technical and organizational bottlenecks are gone, so you no longer have barriers to create engaging experiences, improving customer and employee engagement.

Using Oracle Content Management for business document management, you have the same collaboration capabilities internally and externally on any device to manage your content. Integrated tools such as content connectors enable you to upload content from third-part cloud storage, and Content Capture makes it easy to *automate* document discovery and capture.



Note:

Oracle Content Management Starter Edition has a limited feature set. To take advantage of the full feature set, upgrade to the Premium Edition.

Access Oracle Content Management

After you've been granted access to Oracle Content Management, you receive a welcome email with details about the instance URL and your user name. You'll need this information to log in to the service, so it's a good idea to keep it for future reference.

There are different ways to interact with Oracle Content Management:

- The web interface provides easy access from your favorite web browser. You can manage your content in the cloud, share files and folders with others, start and participate in conversations, create websites (if allowed), and more.
- The desktop app lets you keep your files and folders synchronized between the cloud and your computer. You can sync your own files and those shared with you, making sure you always have access to the latest versions.
- A Microsoft Office add-on gives you access to Oracle Content Management features directly from Microsoft Word, Excel, PowerPoint, and Outlook.
- Mobile apps for Android and iOS provide easy access on your phone or other mobile devices. The mobile apps are instantly familiar, because they look and act just like the service in your web browser. You can access your cloud content, search and sort your files and folders, share content, and work with conversations.
- REST APIs and SDKs provide developers with powerful tools to programmatically incorporate Oracle Content Management functionality into web applications and mobile apps.

Understand Roles

The Oracle Content Management features that you can access depend on the role you've been assigned. You'll see different options depending on your application role. Standard users can work with documents, conversations, and sites. Enterprise users can also access assets. Developers see options to build and customize website pieces such as templates, themes, components, and layouts. Administrators see options to configure the service, integrate the service with other business applications, and set up asset repositories.

There are different types of roles in Oracle Content Management:

- **Organization roles** — Your role within your organization determines what tasks you need to perform and how you use features.
- **Application roles** — Application roles control what features you see in Oracle Content Management.
- **Resource roles** (permissions) — What you can see and do with a resource, such as a document, content item, site, or template, depends on the role you're assigned when the resource is shared with you.

[Learn more...](#)

Manage Assets

Oracle Content Management offers enterprise users powerful capabilities to manage all your assets whether you need to manage digital assets, publishing to multiple channels in various languages, or oversee business documents gathered from a variety of sources. It provides a central content hub for all your assets, where you can organize them into repositories and collections, and create rules to define how they can be used and where.

There are also extensive management and workflow features to guide assets through their creation and approval process and to ensure that only authorized versions are available for use.

It's easy to tag and filter assets so you can quickly find the assets you need. And smart content features will tag and suggest assets automatically as you use them!

Create asset types to define what information you need to collect when users create assets. *Digital asset types* define the custom attributes required for your digital assets (files, images, and videos) and business documents. *Content types* group different pieces of content into reusable units. Users can then create digital assets, business documents, and content items based on these asset types for consistent use.

[Learn more...](#)

Collaborate on Documents

With Oracle Content Management, you can manage your content in the cloud, all in one place and accessible from anywhere.

You can group your files in folders and perform common file management operations (copy, move, delete, and so on) in much the same way as on your local computer. And since all your files reside in the cloud, you have access to them wherever you go, also on your mobile devices. If you install the desktop app, all your content can be automatically synchronized to your local computer, so you always have the most recent versions at your fingertips.

After you get all your content in the cloud, it's easy to share your files or folders to collaborate with others inside or outside your organization. Everyone you share your content with has access to the latest information—wherever they are, whenever they need it. You can grant access to entire folders or provide links to specific items. All access to shared items is recorded, so you can monitor how and when each shared item was accessed.

Conversations in Oracle Content Management allow you to collaborate with other people by discussing topics and posting comments in real time. You can start a stand-alone conversation on any topic, adding files as needed. Or you can start a conversation about a specific file, folder, asset, or site for quick and easy feedback.

All messages, files, and annotations associated with a conversation are retained, so it's easy to track and review the discussion. And your conversations live in the cloud, so you can also view them and participate on the go from your mobile devices.

[Learn more...](#)

Build Sites

With Oracle Content Management, you can rapidly build and publish marketing and community websites—from concept to launch—to provide engaging online experiences. The

process is completely integrated: content, collaboration, and creativity are combined in a single authoring and publishing environment.

To get started quickly, use an out-of-the-box template, drag-and-drop components, sample page layouts, and site themes to assemble a site from predefined building blocks. Or developers can create custom templates, custom themes, or custom components to create unique online experiences.

Add YouTube videos, streaming videos, images, headlines, paragraphs, social media links, and other site objects simply by dragging and dropping components into designated slots on a page. Switch themes and rebrand a site at the touch of a button to provide an optimized, consistent look and feel across your organization.

You can work on one or more updates, preview an update in the site, and then, when you're ready, publish the update with a single click.

In addition to creating and publishing sites in Site Builder, Oracle Content Management also supports 'headless' site development using REST APIs, React JS, Node JS, and other web technologies.

Learn more...

Integrate and Extend Oracle Content Management

As an Oracle Platform-as-a-Service (PaaS) offering, Oracle Content Management works seamlessly with other Oracle Cloud services.

You can embed the web UI into your web applications so users can interact with content directly. Use the Application Integration Framework (AIF) to integrate third-party services and applications into the Oracle Content Management interface through custom actions. Or develop content connectors to bring content that you have already created elsewhere into Oracle Content Management, manage it centrally, and use it in new experiences across multiple channels.

With a rich set of REST APIs and SDKs for content and site management, delivery, and collaboration, you can incorporate Oracle Content Management functionality into your web applications.

Create client applications that interact with your content SDKs and assets in the cloud. Develop custom integrations with collaboration objects or retrieve assets for use wherever you need them. You can access and deliver all your content and assets optimized for each channel, whether it's through a website, content delivery network (CDN), or mobile apps.

Learn more...

Get Started

To help you get started with Oracle Content Management, visit the [Oracle Help Center](#), which has lots of resources, including [documentation](#), [videos](#), [guided tours](#), and [developer information](#).

And if you need it, there's [support](#) and a [community](#) to help.

Key Concepts

Oracle Content Management provides a number of user-friendly tools that help you collaborate on documents with others within and outside your organization. These are some of the key concepts to understand about collaborating on documents with Oracle Content Management:

- [Files and Folders](#)
- [User Roles](#)
- [Data Security](#)
- [Synchronization](#)
- [Mobile Apps](#)
- [Sharing](#)
- [Conversations](#)
- [Annotating and Reviewing](#)
- [Groups](#)

Files and Folders

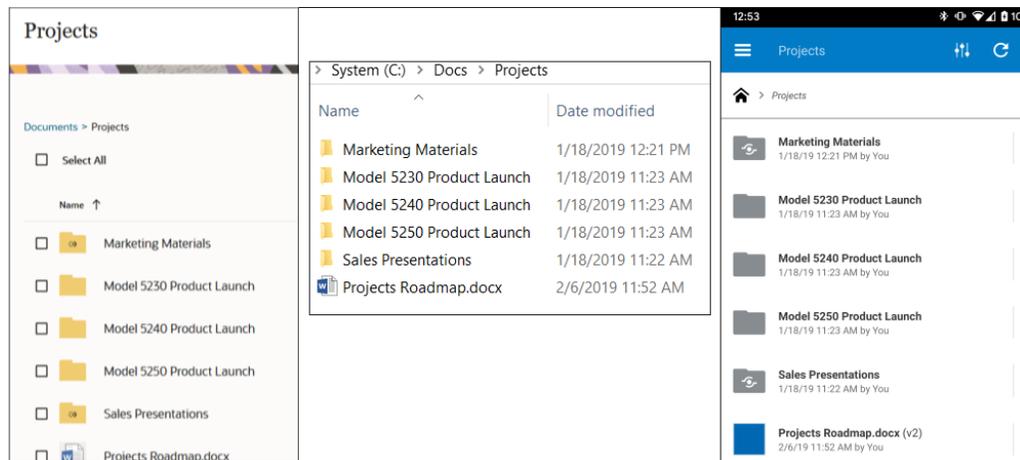
You work with your files in Oracle Content Management in much the same way as on your local computer. You can easily group your files into folders and perform a number of common operations to manage your content, such as copying, moving, renaming, and deleting files and folders. If you synchronize your content in the cloud to your local computer, your virtual folder structure is replicated on your computer. It is also shown in the mobile apps on your smartphone or tablet.

[Learn more...](#)



Note:

Oracle Content Management Starter Edition does not support managing documents, folders, and files. For a full feature set, consider upgrading to Oracle Content Management Premium Edition.



User Roles

What you see and what you can do in Oracle Content Management are determined by how resources are shared and what role you're assigned. Roles are assigned by your service administrator, the person who manages all the features of your Oracle Content Management service.

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

Some common **organization roles** include:

- **Anonymous user:** a person engaging with a public website or other digital experience. This user can download documents or make purchases via a digital channel.
- **Visitor:** someone engaging your website, mobile site or other digital experience to learn about the company. Visitors can interact with specific secure sites, make a purchase, and so on.
- **Employee:** a person who shares documents with coworkers and views documents that were shared. They may also collaborate through conversations and create team sites or partner sites from pre-built templates.
- **Content contributor:** a person who writes articles to be published to a channel.
- **Administrators:** *Repository administrators* create and maintain repositories used to store digital assets. *Site administrators* create and manage sites, either enterprise sites or standard sites. *Content administrators* review submitted content and submit content to translation vendors.
- **Developers:** developers create and maintain tools used for websites, such as templates, themes, and style sheets. Those kinds of tasks are described in detail in *Developing with Oracle Content Management As a Headless CMS*.

User roles include:

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

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

Resource roles include:

- **Viewer**: people who can view content but can't edit or download it.
- **Downloader**: people who can download the associated resource and save it to a personal computer.
- **Contributor**: people who can view, download, and edit the resource.
- **Manager**: people who have full control of a resource.

Learn more...

Data Security

Oracle Content Management uses a multilayered approach to protect your files in the cloud:

- **User name and password**: You need a user account to access the service. Accounts are set up and managed by your service administrator, the person in charge of managing the service for your organization.
- **File encryption**: Your files are protected using Transport Layer Security (TLS) technology. Files are encrypted while they're uploaded (in transit) and when they're stored (at rest) in the cloud. That prevents unauthorized use of the files.
- **Access control**: You have total control over who can access your files. You can add coworkers as members of a folder, and you set the access rights for those users when they're added. In addition to sharing folders, you can also share files using links. If you send a link to a member of a folder, that person can sign in and use the file in the service. If you send the link to a nonmember, that person is restricted from seeing other files in the folder.
- **Virus scanning**: When you upload files to the cloud, they can be checked by a virus scanner if that option is set by your service administrator. Any files found to be infected are quarantined in the Trash bin and a special icon marks the file as infected.
- **Passcodes on mobile devices**: When accessing your files on a mobile device, you can set a passcode to provide additional security. The passcode is a four-digit number that is set and managed by you on your device and it's used in addition to your user name and password. Any files that you download to your device are encrypted and you can't access those files outside of the Oracle Content Management app unless you specifically download the file for use on the device.

Learn more...

Synchronization

The Oracle Content Management desktop app for Windows and Mac lets you synchronize your Oracle Cloud content to all your computers and devices. After installing the application, enter your account information and choose the folders you want to sync. Once you've set things up, everything runs in the background. All cloud folders that you choose to sync are stored locally on your computer. The changes you make to your local files are automatically synced to your files in the cloud. And if you make changes to files in the cloud, then these changes are reflected in the copies on your local computer.

You can sync multiple Oracle Content Management accounts and multiple computers. With syncing both ways, your files in the cloud and on your local computers are always up to date.

The files on your mobile device are also current, so you'll always have the most recent version at your fingertips, wherever you are and whatever computer or mobile device you use.

[Learn more...](#)

 **Note:**

Oracle Content Management Starter Edition does not support the desktop app and synchronization. To take advantage of all Oracle Content Management has to offer, consider upgrading to the Oracle Content Management Premium Edition.

Sync Cloud Folders ?

Owned by You Shared with You

Automatically sync all cloud folders owned by you to your device

Name

- ▶ Projects
- ▼ 2020 Projects
 - Files in 2020 Projects
 - ▶ images
- ▼ 2021 Projects
 - Files in 2021 Projects
 - ▶ blog entries
 - ▶ images
 - ▶ videos

Next

Mobile Apps

Oracle Content Management offers mobile apps, so you have access to all your content in the cloud from your Apple or Android smartphone or tablet.

The mobile apps are instantly familiar, because they look and act just like the service as accessed from your web browser. You can add, rename, delete, and move files,

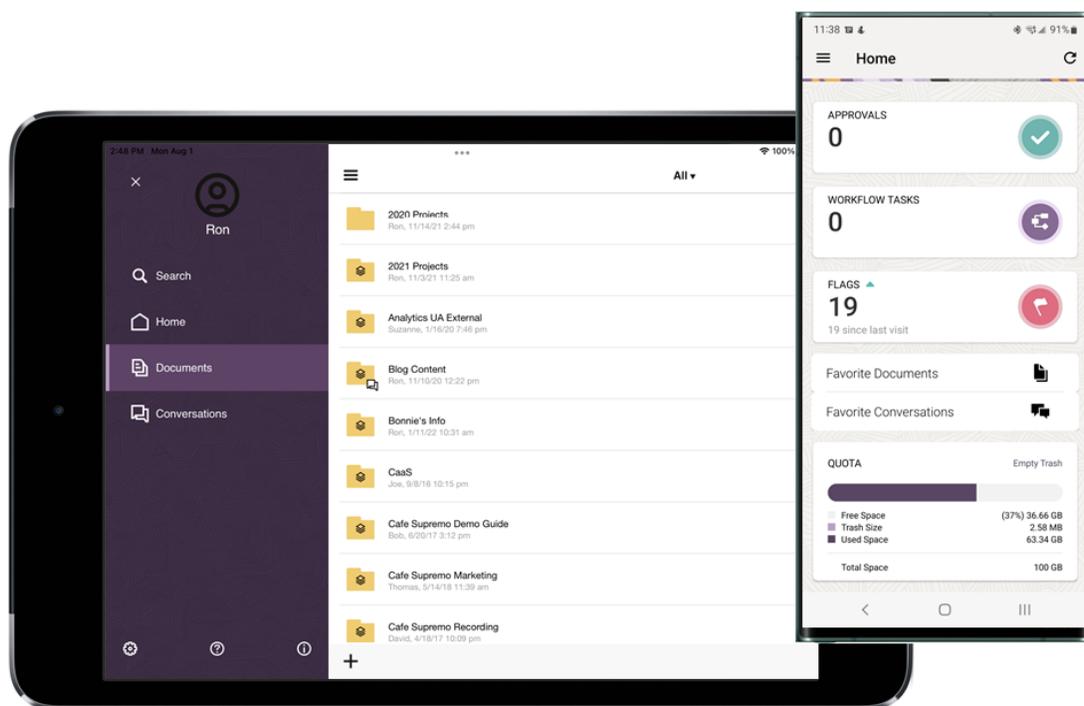
and manage your content. You can also share content and use conversations like you do in a web browser. You'll have all your latest files and discussions at your fingertips wherever you are, whenever you need them.

You can download the mobile apps from the Oracle Content Management web interface or directly from the [Apple App Store](#) or [Google Play](#).

[Learn more...](#)

Note:

Oracle Content Management Starter Edition does not support the mobile apps. To take advantage of all Oracle Content Management has to offer, consider upgrading to the Oracle Content Management Premium Edition.



Sharing

With all your content in the cloud, it's easy to share your files or folders to collaborate with others inside or outside your organization. Everyone you share your content with has access to the latest information—wherever they are, whenever they need it.

You can share an entire folder by adding **members** to that folder. This gives them access to everything in that folder and all subfolders. Members must log in to their Oracle Content Management account to access the shared folder.

Another way to share your content is to create **links** to files or folders. You can send these links to other people to give them convenient access to your content. Links to shared files always point to the latest revisions, so they never get outdated.

You can create **members-only links**, which can only be used by members of the folder who sign in to their accounts. If you create a members-only link to a file, you can choose to let recipients view the file online in their web browser or download it directly without viewing. You can add recipients by searching for their names or email addresses.

You can also create **public links** to files or folders. These can be used by anyone, even without an Oracle Content Management account. A service administrator may limit the use of public links, depending on the policies in your organization. You can also turn off public links in any of the folders that you own (in the folder properties).

You decide what public link recipients can do with your shared content. You may allow people to only view shared files online, or you may decide they should also be able to download files or edit them and upload new versions. You can name your public links so you can easily identify which links are used for what purpose.

For added security, you can limit access to registered Oracle Content Management users only. You can also create public links that expire automatically on a specific date or protect them with an access code.

All access to shared items is recorded, so you can monitor how and when each shared item was accessed. Open an item's properties in your web browser to view its access history. You see actual user names for member links and link names for public links.

[Learn more...](#)

Share Link: Draft - Project Plans.docx ✕

Send links to easily share this content with people. You can create different links with specific permissions.

This link is

Send To

[Edit Link Options](#)

Pick Existing Link

Link Permissions

People using this link will be able to view the content online.

Who can access this link?

Anyone with a link, without signing in

Link Expiration Date

This public link will stop working at the end of the selected day.

Link Access Code

Enter an access code, 8 characters or more, to protect this public link.

Conversations

Conversations in Oracle Content Management allow you to collaborate with other people by discussing topics and posting comments in real time. You can start a conversation on any topic, adding files as needed. Or you can start a conversation about a specific file, folder, asset, or site for quick and easy feedback.

Just start a conversation and then add people to it by clicking the + icon and typing their names. All members can add new messages to a conversation or reply to existing ones. You can also indicate that you particularly like specific comments. To add a message, type it in the

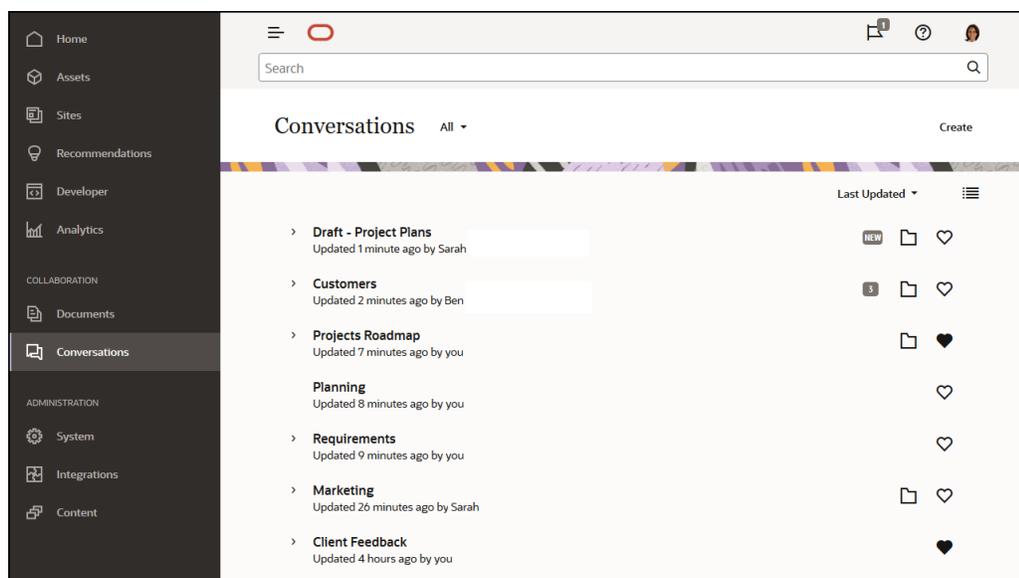
box at the bottom and click Post. You can use some basic formatting such as bold, italics, and underline.

If you want to draw other people's attention to a particular item in a conversation, you can flag them. They will receive an email to point them to the item or to request a reply.

In addition to posting messages, you can also add a file to a conversation to solicit feedback or support the discussion. You add a file by clicking the paperclip icon at the bottom of the screen. You can upload a file directly from your computer or use one that's already in Oracle Content Management.

All messages, files, and annotations associated with a conversation are retained, so it's easy to track and review the discussion. In addition, all your conversations live in the cloud, so you can also view them and participate on the go from your mobile devices.

[Learn more...](#)



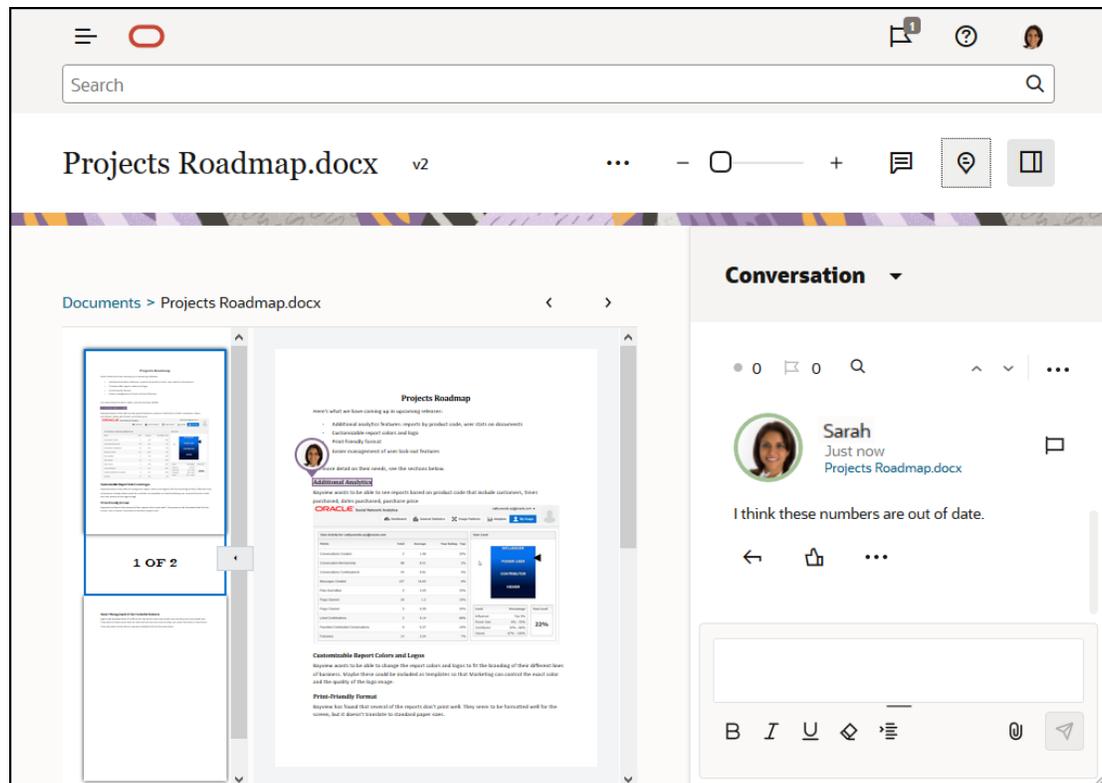
Annotating and Reviewing

Annotations are a great way to review documents or images in real time and to solicit feedback from others.

You can easily add annotations to any file that you have access to in Oracle Content Management, either as part of a conversation or on its own. Open the document or image in the file viewer and click the pushpin icon. You can then mark an area in the viewer and add a comment. If the file is already part of a conversation, your comment will be added to that conversation, and others can view your comment and respond to it. Otherwise a new conversation is created specifically about the file you annotated.

All annotations and comments are saved in the cloud, so you'll access to them in your mobile app, too. You can even respond to comments directly from your smartphone or tablet.

[Learn more...](#)



Groups

Groups in Oracle Content Management allow you to quickly share and communicate with many people at a time. For example, you can share a file with a group or add a group to a conversation, just like you would with individual users. Then everyone in the group has access to that shared file or conversation.

Your service administrator may set up groups for your organization, but you can also create your own groups. You join and create groups from your user menu in the top-right corner of the Oracle Content Management web interface.

If you join an existing group, you'll be included in any sharing that takes place for that group. For example, if someone adds the group as a member to a folder, then you'll have access to that folder, too.

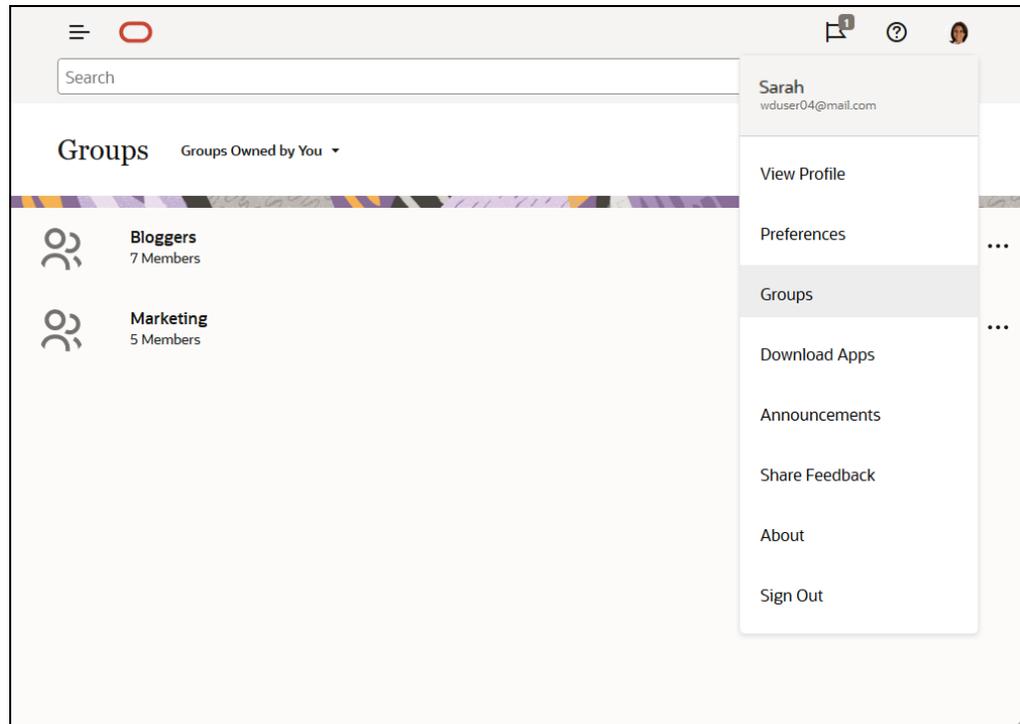
When creating a group, you can make it a **public group**, so everyone can see the group in the list of public groups. If you want, you can also allow people to add themselves to the group. This can be useful, for example, if you want to set up a conversation to gather feedback from a large number of people.

A **private group** lets you limit membership, but people who aren't members can find the group and use it just like they would any group, to share conversations or folders. For example, you could create a group for the sales department. Anyone not in the group can still use that group to collaborate with that department.

A **closed group** offers the tightest control. No one can see the group unless they're already a member and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming merger. The group and its conversations are hidden from everyone except the members of the group.

You add people to a group by searching for their names or email addresses and then assigning roles to them. If you have a manager role in groups owned by someone else, you can add people to those groups.

[Learn more...](#)



Sign Up and Sign In

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

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

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

Learn About User Roles

What you see and what you can do in Oracle Content Management are determined by how resources are shared and what role you're assigned. Roles are assigned by your

service administrator, the person who manages all the features of your Oracle Content Management service.

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

Some common **organization roles** include:

- **Anonymous user:** a person engaging with a public website or other digital experience. This user can download documents or make purchases via a digital channel.
- **Visitor:** someone engaging your website, mobile site or other digital experience to learn about the company. Visitors can interact with specific secure sites, make a purchase, and so on.
- **Employee:** a person who shares documents with coworkers and views documents that were shared. They may also collaborate through conversations and create team sites or partner sites from pre-built templates.
- **Content contributor:** a person who writes articles to be published to a channel.
- **Administrators:** *Repository administrators* create and maintain repositories used to store digital assets. *Site administrators* create and manage sites, either enterprise sites or standard sites. *Content administrators* review submitted content and submit content to translation vendors.
- **Developers:** developers create and maintain tools used for websites, such as templates, themes, and style sheets. Those kinds of tasks are described in detail in *Developing with Oracle Content Management As a Headless CMS*.

User roles include:

- **Administrators**, including a *cloud account administrator*, an *identity domain administrator*, *site administrators*, *content administrators*, *repository administrators*, *storage administrator*, and an *entitlement administrator*.
- **Developers**, including *enterprise developers* and *standard developers*.
- **Users**, including *standard users*, *enterprise users*, and *integration users*.
- **Visitors**

Resource roles include:

- **Viewer:** people who can view content but can't edit or download it.
- **Downloader:** people who can download the associated resource and save it to a personal computer.
- **Contributor:** people who can view, download, and edit the resource.
- **Manager:** people who have full control of a resource.

Learn more...

Download the Apps

Oracle Content Management has several apps and extensions, which you can download on the Download Apps page. When accessing Oracle Content Management in a web browser, click your user name, and then click **Download Apps**.

- **Oracle Content desktop app**—Use the [desktop app](#) to keep your files and folders synchronized between the cloud and your computer. You can sync your own files and those shared with you, making sure you always have access to the latest versions. You can download the Windows version (on the **Windows** page) or the macOS version (on the **macOS** page).
When you install the desktop app, an [add-in for Microsoft Office](#) is automatically installed so you can work with synced files directly from Microsoft Office 2016 or later versions. If your system administrator enabled Microsoft Office Online integration, you can work in Microsoft Office Online directly from the web client.
- **Oracle Content mobile apps**—Use the [mobile apps](#) to access Oracle Content Management on your phone or other mobile devices. The mobile apps are instantly familiar, because they look and act just like the service in your web browser. You can access your cloud content, search and sort your files and folders, share content, and work with conversations.
The mobile apps are available in the appropriate app store ([Apple App Store](#) or [Google Play](#)). You can also find the mobile apps using the QR codes on the **iOS** or **Android** pages. Alternatively, you can access Oracle Content Management through a browser on your mobile device, and you'll be prompted to download the mobile app.
- **Oracle Content Capture client**—If you have the Capture Client user role, you have access to the Content Capture client. The Content Capture client enables you to scan and import documents, using the industry-standard TWAIN interface to scan from desktop scanners or other TWAIN-compliant input devices. You can then review, edit, index, and release those documents so that they can be further processed. You can download the client from the **Windows** page.
- **Oracle Content extension for Adobe**—The Oracle Content extension for Adobe enables you to use the assets stored in Oracle Content Management in your Adobe Creative Cloud applications and save your Adobe Creative Cloud images as assets in Oracle Content Management. You can download the Windows version (on the **Windows** page) or the macOS version (on the **macOS** page).
- **Sauce Video mobile apps**—[Sauce Video](#) is the video creation platform for teams. It provides a fast, easy, and affordable way to create video together anywhere, anytime. The Sauce Video mobile apps enable you to create video on your phone or other mobile devices.
The Sauce Video mobile apps are available in the appropriate app store ([Apple App Store](#) or [Google Play](#)). You can find the Sauce Video mobile apps using the QR codes on the **iOS** or **Android** pages.

Supported Languages, Devices, and Software

By default, the web interface language type matches the web browser locale, but you can override that in your user preferences. Click the menu next to your user name and select **Preferences** then choose your language option. If you change your language setting, that won't take effect until the next time you sign in.

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

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

Keyboard Shortcuts

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

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

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

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

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

Global Keyboard Shortcuts

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

Document View Keyboard Shortcuts

Document viewing tasks — tasks you can perform when viewing a document in the web client using keyboard shortcuts.

Task	Keyboard Shortcut
Show or hide the toolbar.	Shift+z
Toggle the document view between Actual size, Fit width, and Fit page.	z
Zoom out incrementally.	-
Zoom in incrementally.	+
Toggle between standard view and full-screen mode.	f

Calendar Keyboard Shortcuts

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

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

Content Type Editor Keyboard Shortcuts

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

Conversation Keyboard Shortcuts

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

Message List Keyboard Shortcuts

Task	Keyboard Shortcut
Post a message.	t
Reply to selected message.	r

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

Posting or Replying Keyboard Shortcuts

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

Adding Annotations Using Keyboard Shortcuts

To add an annotation to an image or file:

1. Preview the file or image to annotate.
2. Navigate to the annotation icon () using the Tab key.
3. Activate the icon using Shift+Enter or Shift+Space. An annotation is placed on the item and a toolbar popup appears.
4. Use the arrow keys to move the annotation and use Shift+Arrow keys to size the annotation square.
5. Navigate to the **OK** button to exit the annotation popup and then add the annotation text using the keyboard.

Icon Quick Reference

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

- [Web Client Icons](#)
- [Mobile App Icons](#)
- [Desktop Icons](#)
- [Digital Asset Icons](#)
- [Microsoft Radial Menu](#)

Web Client Icons

Here's a quick look at the icons you might see in your web client.

Icon	Meaning
 (on the left top)	Click to show or hide the side navigation menu.
 (on the left bottom)	Click to expand or contract the side navigation menu.
	Click to open a selected folder or item.
	Click to view a selected item.
	Click to edit a selected item.
	Click to move the selected item or items to another location.
	Click to copy the selected item or items.
	Click to rename a selected item.
	Click to extract a selected compressed file.
	Click to download a selected item and store it for use on your local computer.
	Click to download a folder or multiple selected items in a .zip file.
	Click to create a link for an object to share with others.
	Click to mark an item or folder as a favorite.
	Click to upload an item to a selected folder, or to upload a new version of a selected item.
	Click to lock or unlock an item. If an item has been locked by someone it can't be used by someone else until the file is unlocked.
	Click to add a selected item or items to an asset repository.
	Click to delete the selected asset, assets, or folders.
 (on the right)	Click to change how you view the items on the page, such as in a table, list, or grid.
	A folder that hasn't been shared with anyone.
	A folder that was shared with you or that you shared with others.
	Shows that a conversation has been started about a file or folder. A conversation is a place where you can share comments with people about a particular item. Click or tap to open the conversation.
	Click to see menu options that might not fit on the menu bar.

Icon	Meaning
	Click to open the side panel to start a conversation or view a conversation that's already started, as well as access a drop-down menu to view metadata and API information.
	Click to close the side panel.
	In table view, click to organize columns and choose which columns are displayed.
	In table view, click in a column header to sort the table display.
	Click to view a list of conversation posts others have assigned to you, or filter to show flags you have assigned to others.
	Click to manage metadata of a file or folder.
	(shows when viewing tags and metadata in the sidebar)

Mobile App Icons

Here's a quick look at the icons you might see in your mobile app.

Icon	Meaning
	Tap to open the left navigation panel.
	Tap to sort the list of objects.
	A folder that hasn't been shared with anyone.
	A folder that was shared with you or that you shared with others.
	The small conversation icon at the bottom of a folder or document shows that a conversation has been started about the folder or file. A conversation is a place where you can share comments with people about a particular item. To open the conversation, tap  , then tap Go to Conversation .
	Tap to create a link for a file or folder so you can share it with others.
	Tap to view or edit the members of the folder.
	Tap to mark an object as a favorite.
	Tap to see menu options for the object.

Desktop Icons

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

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

Digital Asset Icons

When using digital assets, the status of an asset is indicated by an icon at the bottom of the asset tile.

-  Published
-  Approved
-  Rejected
-  Draft
-  Translated
-  In Review

When editing asset attributes, additional icons are used to represent various actions.

Icon	Description
	Click to add a new media item from Documents, your computer, or an external source such as Google Drive (if configured by your administrator).
	Click to select an existing media item from an asset repository, or to select an existing content item to reference.
	Click to edit the media, media attribute, or content item.
	Click to remove the selected media or content item.
	Click to create a new content item using a content type.

Microsoft Radial Menu

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

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



Service Accessibility

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

Keyboard shortcuts are described in detail in [Keyboard Shortcuts](#).

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

Support

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

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

2

Manage Your Files and Folders

The Basics

- [Get to Know the Documents Page](#)
- [Work with Your Files and Folders](#)
- [Customize Your Profile and Preferences](#)
- [View Files](#)

Work with Files and Folders

- [Create Microsoft Office Files in the Web Client](#)
- [Upload Files](#)
- [Download Files](#)
- [Search Content and Conversations](#)
- [Lock a File](#)
- [Edit a File](#)
- [Use Metadata](#)
- [Use Assets](#)

Collaborate with Others

- [Share Files and Folders](#)
- [Use Conversations](#)
- [Use Workflows](#)

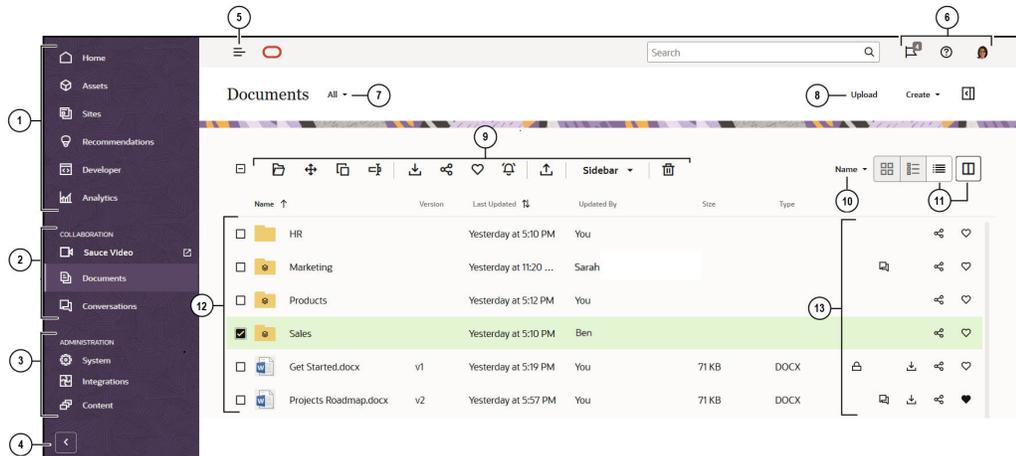
Get to Know the Documents Page

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

Note:

Oracle Content Management Starter Edition has a limited feature set that does not support Documents or the desktop and mobile apps. To take advantage of the full feature set, upgrade to the Premium Edition.

By default you see the **table view** of the Documents page:



Item	Description
1	The navigation panel is where you can switch between features. The options you see on this panel depend on the user role you've been given. For example, only enterprise users will see options for Assets . Click Home to display a page that includes links to recent items, documentation, guided tours, and other helpful links.
2	The collaboration section provides access to your documents, conversations , and to the Sauce Video application if your service administrator has enabled it. Sauce video is the video creation platform that provides teams a fast, easy, and affordable way to create video together anywhere, anytime, using the web app as well as mobile apps.
3	If you have administrative privileges, you'll see options that let you set up system-wide options; integrate Oracle Content Management with other services; and configure repositories, localization policies, and other features related to digital asset management.
4	Click the arrow to expand navigation to show text for the menu options in the navigation menu or collapse it to show an icon-only navigation menu.
5	Click the show/hide navigation icon to open or close the navigation panel.
6	The user area is where you can change your preferences or find the desktop and mobile apps. Click your user picture to change your defaults. If you have notifications from conversations, the flag will show the number of notifications.
7	Filter what you see to view only the files and folders owned by you, shared with you, your favorites, or what's in your trash folder.
8	Upload new files, create new folders or files , or view file and folder properties () by clicking the appropriate option.
9	Select a file or folder and then perform an action such as changing membership on an item or deleting an item. To be notified when changes happen to a specific folder, select it and click  or right-click on the folder and select Subscribe to notifications from the contextual menu.
10	Sort your content list by name or by date.
11	Click the view icon to display items in a list view, a grid view, or a table view. In table view, click the table preferences icon () to organize columns and choose which columns are displayed in the table. Click the column sort icon () in a column header to sort the table display.

Item	Description
12	Your file and folder list shows the types of files as well as if folders are shared  or are your own unshared folders  .
13	Next to each file and folder you see information related to the item: file version, date and time the item was last updated, who updated the item, file size and type, and the following icons. <ul style="list-style-type: none">  : The lock icon shows that a file has been locked by a user.  : The conversation icon shows that a conversation has been started to discuss the item.  : Click the download icon to download a item to your computer.  : Click the share icon to create a link to the item to share with others.  : Click the favorite icon to make the item easier to find.  : Click to be notified when changes happen to a specific folder. What notifications you receive and when are specified in your profile notification preferences.

Folders

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

- Click **Share Link** to create a link for the folder.
- Click **Members** to add members to the folder. Note that you can't share your Digital Assets folder.
- Click **Upload** to add new content to the folder.
- Click **Create** to create a subfolder.
- Click **More Actions** to see additional options for the file or folder.
- Click  to open the sidebar where you can start or view a conversation about the folder or item you're viewing, or view metadata for the item.

Work with Your Files and Folders

You can organize and work with any kind of file that's allowed by your service administrator (the person in charge of managing Oracle Content Management). You can upload and download documents, video files, pictures and graphics—all the files you might need for your projects.

Although not discussed in this topic, you can also upload templates and other files needed for your websites. This includes the digital assets, such as pictures or videos, that you might need on your website. Those are managed using the digital asset manager. You can also create content items, which are blocks of content based on a content type created by your administrator.

This topic discusses the following areas:

- [Change Your View of the Documents Page](#)
- [Folder Actions](#)

- [File Actions](#)
- [File and Folder Icons](#)
- [Storage Quota](#)

Change Your View of the Documents Page

You can change your view of the Documents page to suit your needs.

Task	Description
Filter your view of files and folders	To filter what you see, click the Documents menu. You can view all items, items owned by you, shared items, favorites, or items in your Trash folder.
Sort your files and folders	To sort your file and folder list, click the sort option (Name or Last Updated) at the top right corner of the file list.
Change the view of your files and folders	You can view your files and folders in a list view, a grid view, or a table view. To change the view, click the view menu icon () to the right of the sort menu, and select the view you want.

Folder Actions

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



Note:

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

Task	Description
Create a new folder	Browse to where you want to create a new folder, click Create , then select Folder . Add a name and, optionally, a description.
Open a folder	Select a folder and choose Open in the right-click menu or click  in the actions bar.
Share a folder	Select a folder and choose Share Link in the right-click menu or click  in the actions bar or next to the folder. You can set whether the link is public or for members only, permissions for the link, and other settings.
View or edit the members of a folder	Select a folder, then choose Members in the right-click menu or select Sidebar in the actions bar and choose Members . If your service administrator has enabled inclusion of external users, then you can choose to allow them access to the folder or not. External users can collaborate on objects to which they're given access, but they cannot be assigned the manager role. This safely limits their ability to create and remove content.
Copy or move folders	Select one or more folders, then choose Copy or Move in the right-click menu or in the actions bar click  to copy or  to move. If you copy a folder to the same location, the copy is renamed with a number added to the name. For example, <i>Sales(2)</i> .

Task	Description
Delete folders	Select one or more folders, then choose Delete in the right-click menu or click  in the actions bar. If you delete a folder, it's moved to your cloud Trash folder, just like on your local computer. If you change your mind, go to the Trash folder and restore the deleted item. To check your Trash, in the Documents menu, click Trash . Deleted items stay in the Trash until one of the following events happens: <ul style="list-style-type: none"> You permanently delete them. Your Trash quota is reached. The Trash is automatically cleared out according to the schedule set by your service administrator, the person in charge of managing the service for your organization.
Rename a folder	Select the folder to rename, then choose Rename in the right-click menu or click  in the actions bar.
Tag a folder	Select one or more folders, then choose Tags and Metadata in the right-click menu or click Sidebar in the actions bar and choose Tags and Metadata . Tagging an item is similar to adding a keyword for the item, letting you group items later for use or for searching.
View folder properties	Select a folder, then choose Properties in the right-click menu or click Sidebar in the actions bar and choose Properties .
Change folder ownership	You can transfer ownership of a folder to another person. When you do, the folder and its content will be added to the quota of the person assuming new ownership. To change the folder owner, select the folder, view folder properties and click Change Owner , then select the name of the new owner from the list. Add an optional message to be sent to the new owner or use the default message as given.
Change folder sharing settings	You can control sharing settings such as whether people can create public links to the folder and the default role assigned for public links. To change sharing settings, select the folder, view folder properties and click the Sharing tab, then edit the settings.
Add a folder to your favorites	To add a folder to your favorites, choose Add to Favorites in the right-click menu or click  in the actions bar. To view your favorites, in the Documents menu, click Favorites .

File Actions

The following table lists common actions you can perform on files from the actions bar or right-click menu. Depending on how wide your browser window is, the actions bar may not show all menu options. If you don't see an option when you select an item, click **More** in the actions bar to see the hidden options. Some actions are available through the sidebar and can also be accessed by first clicking  to open the sidebar, or selecting **Sidebar** on the actions bar.

Note:

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

Task	Description
Upload a file	Browse to where you want to upload the file, choose Upload in the right-click menu or click  in the actions bar, then select the file from your computer.
Create a new Microsoft Office file	Browse to where you want to create a new file, click Create , then select the type of Microsoft Office file you want to create.
View a file	Select a file, then choose View in the right-click menu or click  in the actions bar. If you selected a Microsoft Office file and your system administrator has enabled Microsoft Office Online integration, to view the file click View in the actions bar and select either View in [Office] Online (for example, "View in Word Online") or Web Preview to view the document in Oracle Content Management.
Edit a file	Select a file, then choose Edit in the right-click menu or click  in the actions bar. The desktop client opens the file in the associated program on your computer. If you haven't already installed the desktop client, you'll be prompted to do so. If you selected a Microsoft Office file and your system administrator has enabled Microsoft Office Online integration, you can edit the file in Office Online by clicking Edit and selecting Edit in [Office] Online (for example, "Edit in Word Online") or selecting Edit in [Office] (desktop) to edit the file in the desktop client.
Download a file	Select a file and choose Download in the right-click menu or click  in the actions bar or next to the file, then select where on your computer you want to store the file.
Download multiple files as a .zip file	Select the folders or files to download and choose Download in the right-click menu or click  in the actions bar, then select where on your computer you want to store the .zip file.
Extract multiple files from a compressed file	You can upload compressed files and extract them within Oracle Content Management. This is a useful way to easily create a hierarchy of folders and files, or to revision multiple files at once. Select the compressed file to extract and choose Unzip in the right-click menu or click  in the actions bar. Select from the options in the dialog and click Unzip to extract the file.
Lock a file	You can lock a file so no one else can edit the file. To lock a file, select it, then choose Lock in the right-click menu or click  in the actions bar. When you're done with the file, you can unlock it.
Share a file	Select a file and choose Share Link in the right-click menu or click  in the actions bar or next to the file. You can set whether the link is public or for members only, permissions for the link, and other settings.
Add a file to Assets	Select one or more files and choose Add to Assets in the right-click menu or click  on the actions bar, then select the repository you want to store the asset in.

Task	Description
Copy files	Select one or more files and choose Copy in the right-click menu or  in the actions bar. If you copy a file to the same location, the copy is renamed with a number added to the name. For example, <i>Sales Report(2).doc</i> .
Move files	Select one or more files and choose Move in the right-click menu or  in the actions bar.
Delete files	Select one or more files and choose Delete in the right-click menu or  from the actions bar. If you delete a file, it's moved to your cloud Trash folder, just like on your local computer. If you change your mind, go to the Trash folder and restore the deleted item. To check your Trash, in the Documents menu, click Trash . Deleted items stay in the Trash until one of the following events happens: <ul style="list-style-type: none"> You permanently delete them. Your Trash quota is reached. The Trash is automatically cleared out according to the schedule set by your service administrator, the person in charge of managing the service for your organization.
Upload a new version of a file	Select a file and choose Upload New Version in the right-click menu or click  in the actions bar, then select the new version from your computer.
View and manage file version history	To view the history of a file, select it and choose Version History in the right-click menu or click Sidebar in the actions bar and select Version History . When viewing a file, click the version number next to the file name to see the version history. Click a specific version in the history to view it. To make a previous version the current version, on the Version History tab, click Make Current for the version you want to use as the current version. You can also delete previous versions or download older versions by clicking Delete or Download .
Rename a file	Select the file to rename and choose Rename in the right-click menu or click  in the actions bar. You can't change a file extension.
Tag a file	Select one or more files and choose Tags and Metadata in the right-click menu or click Sidebar in the actions bar and select Tags and Metadata . Tagging an item is similar to adding a keyword for the item, letting you group items later for use or for searching.
View file properties	Select a file and choose Properties in the right-click menu or click Sidebar in the actions bar and select Properties .
View file access history	To view who has accessed a file, view file properties and click the Access History tab.
Add a file to your favorites	To add a file to your favorites choose Add to Favorites in the right-click menu or click  in the actions bar or next to a file. To view your favorites, in the Documents menu, click Favorites .

File and Folder Icons

Icon	Description
	A plain folder indicates one of your personal folders.
	A folder with a shared icon indicates that you shared the folder or someone else has shared a folder with you.
Various file icons	File icons show the file extension.
	The conversation icon shows that there's a conversation started for that item.
	The lock icon shows that a file is locked.
	Click the download icon to download a file.
	Click the share icon to share a file or folder with other people.
	Click the favorite icon to add the file or folder to your favorites.

Storage Quota

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

- In your web browser, click your user name and then click **Preferences**. Select **Documents** from the **Preferences** menu.
- On your mobile device, tap the **Settings** icon to open your settings information.

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

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

Customize Your Profile and Preferences

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

- **General:** You can change your date format and language.
- **Notifications:** You can change whether or not you are notified by email, slack, or both when certain activities happen, such as if you are added to a folder, or flagged in a conversation. If you subscribe to a folder, you can specify the types of actions to that folder to be notified about. For example, you can be notified when content is added or updated, the folder is moved or renamed, or other actions occur.

 **Note:**

You need to [authorize the Oracle Content App](#) in your Slack Workspace to activate Slack Notifications.

By default, you will not be notified if flagged in a conversation, even if the flag is requesting a response or set to urgent. To be notified, you must explicitly enable the preference to do so. You can also receive a daily digest of activities.

- **Conversations:** You can change the way messages are managed and change your membership options in conversations.
- **Documents:** You can view your space quota and the notifications you'd like to set when document-specific behavior occurs. You can also specify if you'll allow public links to your files and folders, and what the default role for new public links should be. You can also set the maximum role you'll allow for any public links that are created. Overall sharing rules are set for the entire system by your service administrator, so some of these options may not be available.
- **Linked devices:** This shows any mobile devices or desktop apps that are linked to your account. If you change devices or lose one, you can click **Revoke** and your sign-in session is ended. All local content stored on the device for that account is deleted.

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

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

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

View Files

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

Depending on how wide your browser window is, the menu bar may not show all menu options. If you don't see an option when you select an item, click ******* in the menu bar to see the hidden options. For some of the actions, a floating toolbar is used. If the floating toolbar is not visible, hover at the bottom of the document until it appears, or enter **Shift+z** on the keyboard.

Figure 2-1 Floating Toolbar



 **Note:**

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

Task	Description
View the file in Microsoft Office Online	If you're viewing a Microsoft Office file and your system administrator has enabled Microsoft Office Online integration, you can view the file in Microsoft Office Online by clicking View , then choosing View in [Office] Online (for example, "View in Word Online").
Edit the file in Microsoft Office	If you're viewing a Microsoft Office file and your system administrator has enabled Microsoft Office Online integration, you can edit the file in Microsoft Office Online by clicking Edit , then choosing Edit in [Office] Online (for example, "Edit in Word Online"). If you've installed the desktop client, you can instead edit the file on your computer by clicking Edit in [Office] (desktop) (for example, "Edit in Word (desktop)").
Share a link to the file	Click Share Link . You can set whether the link is public or for members only, permissions for the link, and other settings.
Download the file	Click Download to save a copy of the file to your computer.
View the file in full-screen mode	In the floating toolbar, click the full-screen icon  to hide the interface and view the document in full-screen mode. Click the icon again or press f on your keyboard to exit full-screen mode. Use the arrows in the full-screen mode to move to other files in the folder. Use the controls on the floating toolbar to zoom in or out of the view.
Add the file to your favorites	Click Add to Favorites . To view your favorites, in the Documents menu, click Favorites .
Lock the file	Click Lock to lock the file so no one else can edit it. When you're done with the file, you can unlock it.
Upload a new version of the file	Click Upload New Version , then select the new version from your computer.
View the file's version history	Click Version History . To make a previous version the current version, on the Version History tab, click Make Current for the version you want to use as the current version. You can also delete previous versions or download older versions by clicking Delete or Download .
Rename the file	Click Rename . You can't change a file extension.

Task	Description
View the file's properties	Click Properties to view file details such as name, description, size, and owner. You can also see who has accessed the file and the version history.
Change the magnification	In the floating toolbar at the bottom of the document, select one of the preset options, click the plus (+) or minus (-) icons, or move the slider bar. If the floating toolbar is not visible, hover at the bottom of the document until it appears, or enter Shift+z on the keyboard. Preset options are: <ul style="list-style-type: none"> • Actual size  • Fit to page  • Fit width 
Add an annotation to the file	Click  to add an annotation. To view annotations, click  .
View or start a conversation about the file	Click  to open the sidebar and start a conversation about the file or view any conversation that's already in progress.
View the file's metadata	Click  , then in the sidebar menu, choose Tags and Metadata .
View other files in the folder	Click the right and left arrows at the top of the preview window to view other files in the folder. If viewing the document in full-screen mode, the arrows are positioned on either side of the document.

Upload Files

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

- Drag and drop the files from your local computer to your web browser.
- Click **Upload** on the menu bar to add files to the current location.
- Select an unopened folder and choose **Upload to this Folder** from the right-click menu or click  in the actions bar.
- You can also select a file and choose **Upload New Version** from the right-click menu or click  in the actions bar.

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

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

- Try to keep file uploads smaller than 5 GB. Some web browsers can't process files bigger than that.
- To add the contents of an entire folder, you can upload a .zip file of the folder and contents and unzip it in Oracle Content Management. You can also set up the desktop app. Just add the folder into the sync folder and the content is added to Oracle Content Management for you.
- If someone shared a folder with you, you must have at least a Contributor role in the folder to be able to edit a file there. When you edit a file you are uploading a new version of the file to the folder.
- Your service administrator may limit the kinds of files you can upload. To see what file types aren't allowed, open your user menu. Click **Preferences**. The Documents section lists any limitations on file types and file sizes (if there are any). Files types are listed according to the file extensions, such as .mp3 or .exe.
- To cancel an upload, click the **Details** link on the information bar at the top of the screen while the file uploads. Click the **X** for the file you want to cancel.

Download Files

If you have the Download resource role on a file, you can download the file from the cloud to your local computer in a couple of ways:

- When viewing the file, click **Download** in the file viewer.
- When viewing files in a list, table, or grid, select the file and choose **Download** from the right-click menu or click  in the actions bar or next to an the individual item.

When you download a file, it goes to the download location configured for your web browser or you may be able to choose the location to download the file to, depending on your web browser settings.

Download Multiple Files

You can download more than one file at a time or a folder with multiple files in it. To download more than one file or folder at a time, select the files and folders and choose

Download in the right-click menu or  in the actions bar. A .zip file is prepared with the selected files and folders and automatically downloaded when ready.

If a folder contains subfolders with files, they are also included in the .zip file. If you select an empty folder that does not contain any files, then it is not included in the .zip file.

There are some limitations:

- .zip files larger than 2 gigabytes cannot be downloaded.
- .zip files cannot contain more than 1000 items.

 **Note:**

A document and the folder that contains it are considered as separate items in the .zip file, so if you select 4 folders that each have 250 documents in them, there are 1004 items in the .zip (4 folders + 1000 documents) and the download will fail.

Extract Multiple Files From A Compressed File

You can upload compressed files and extract them within Oracle Content Management. This is a useful way to easily create a hierarchy of folders and files, or to revision multiple files at once.

1. Select the compressed file to extract and choose **Unzip** in the right-click menu or click  in the actions bar.
2. By default, the option to create a new folder for the extracted files is selected. To change the default and select an existing folder where you want the file extracted, scroll to the bottom of the dialog and enable **Select an existing folder**.
3. Select the folder where you want to either create the new folder or unzip the file and click **Unzip**.

If you chose to create a new folder, the new folder uses the name of the .zip file and the .zip file is extracted into the new folder. If a folder of that name already exists, both folders are kept and a number is appended to the new folder name. For example, if a file named *MyZip.zip* is extracted into a new folder, the new folder would be named *MyZip*. If *MyZip.zip* is extracted to a new folder at a location that already has a *MyZip* folder, the new folder would be named *MyZip(2)*.

4. If you chose to extract into an existing folder, then you must choose how to resolve duplicate names. Options are:
 - **Keep both files** (default)—Duplicate names are adjusted
 - **Replace existing files**—the extracted file becomes a new revision of the existing file of the same name
 - **Ignore duplicate files**—files in the .zip file with the same name as existing files are not extracted from the .zip file.
5. Once you've selected how to resolve duplicate names, click **Apply**.

 **Note:**

Oracle Content Management extracts compressed files that are encoded with the UTF-8 character set. If the files and folders in a compressed .zip file are encoded with a character set other than UTF-8, an error may occur and the file and folder names and other properties may be unreadable.

Search Content and Conversations

Enter a search term, such as a file name, conversation name, digital asset tag, or hashtag, at the top of the screen and press **Enter** or click the Search icon. If you want to search only in a specific folder, open the folder and enter your search term. You can enter just a few characters of your search term and a list of possible matches is shown, separated by type (documents, conversations, and so on). This lets you quickly find what you need even if you don't know the entire search term.

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

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- If you search for an item that has special characters in the name, the item isn't returned in the suggested search results for documents or folders.
- You can search for multiple terms by separating the terms with a comma or a space.
- To search for a phrase, use double quotes around the phrase. For example, "United States" returns files with the exact phrase `United States` in the file.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.
- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
 - `not` or the dash (-). For example, `Report2018,Report2019 -sales` returns `Report2018` or `Report2019`, but not items with the keyword `sales` in them.
 - `or` or a comma. For example, `Report2018 or Report2019` returns the same results as `Report2018,Report2019`.
 - `and` or a space. For example, `Report2018 and Report2019` returns the same results as `Report2018 Report2019`.

The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2018 and Report2019 not Report2019` returns nothing because `not` is evaluated first.

- Use parentheses to group complex queries. For example, you can search for `States` and (not "United States").
- The search is done on Favorite shared folders first and then other shared folders, up to 5000. If you have more than 5000 shared folders (either shared by you or with you), a global search may not return the expected results. If you think that's the case, you may want to designate some folders as Favorites before searching, to ensure better search results.
- If a file is larger than 10MB in size, it won't be included in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Lock a File

Locking a file shows other people that you are working with the file. Select the file you want to lock and choose **Lock** in the right-click menu or click  in the actions bar. When viewing a file, click **...** and then select **Lock**. The Lock icon () is added to the file's information line. Other people can unlock the file if they need to use the it. If they do, you get an email telling you who unlocked it and when.

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

Edit a File

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

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

If your system administrator has enabled Microsoft Office Online integration, you can also [edit files in Microsoft Office or Microsoft Office Online](#).

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

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

- Try to keep files smaller than 5 GB. Some web browsers can't process files bigger than that.
- If someone shared a folder with you, you must have at least a Contributor role in the folder to be able to edit a file there. When you edit a file you are uploading a new version of the file to the folder.
- A new version of the file is created each time the file is autosaved.

Use Metadata

Metadata is used to quickly categorize your files and folders with additional descriptions.

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

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

People with the Owner, Manager, or Contributor [resource role](#) can apply metadata to files and folders. People with the Viewer or Downloader resource role can view any metadata that is set.

Metadata is automatically created for items that are stored as digital assets. Only service administrators can create additional metadata. Work with your administrator to develop the metadata you need.

To start using metadata:

1. Select the file or folder you want to add metadata to and click  to open the sidebar.
2. Select **Tags and Metadata** from the pane's drop-down menu.
3. Click  to open a list of available metadata.
4. Select the name of the metadata you want to use, and then click **Save**.
5. The fields that were created for the metadata are displayed in the side panel. Enter the information as needed. Remember, if this is a metadata for a folder, any information entered will be used for all the files in the folder.
The following restrictions apply to the field values users can enter:
 - **Text:** Maximum of 1,000 characters. Can't include # * & | ? < > ^ ; { } () ' = + \
 - **Number:** Maximum of 15 characters. Must be a whole number, no decimals.
6. Click **Save** when done.

Use Assets

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

“Digital asset management” is a way to group and manage all the assets that are used for one purpose, like in a website or for a particular project. Assets can include graphics or text documents. They're stored in a repository, which is created by content administrators. You can add the files (“assets”) to a repository, and the files are managed in your Asset view. You can upload files from your computer, or add files that

are already stored in your home directory. You can tag assets, too, by adding a keyword when you add the asset. This makes it easy to find and sort them later.

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

Digital assets and repositories are discussed in detail in *Managing Assets with Oracle Content Management* and in the Get Started with Building Sites chapter in *Building Sites with Oracle Content Management*.

Share Files and Folders

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

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

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

You can even add external users who may not be a part of your organization to a folder, provided your service administrator allows it and their email address is registered with your service. External users can collaborate on objects to which they're given access, but they cannot be assigned the manager role. This safely limits their ability to create and remove content.

See [Share Files and Folders](#) for more details.

Use Conversations

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

Use Workflows

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

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

1. Select the folder.
2. Choose **Properties** in the right-click menu or select **Sidebar** from the actions bar and then choose **Properties**.
3. Set **Initiate process on document arrival** to **Yes**.

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

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

To learn more, see [Getting Started with Oracle Process Cloud Service](#).

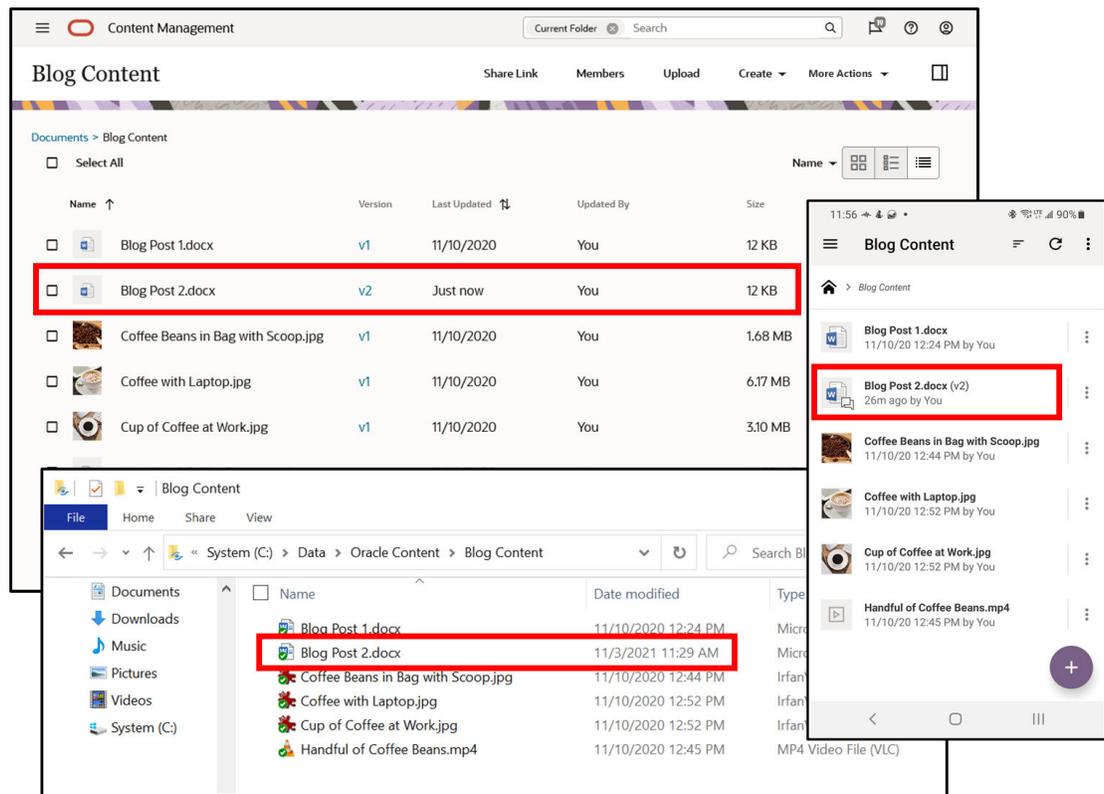
3

Work with the Desktop App

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

[Take a quick tour of the desktop app.](#) (English only)

It's easy to get started. Just [install the client software](#) and [set up your account](#).



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

[Work with synced files.](#) You can manage the synced files similar to how you'd manage any other files on your computer. You can even directly add files and folders into your local account folder and they'll be added to your cloud account. The files are available to use in your browser or a mobile device. All your information stays up-to-date while the sync client is running.

[Sync files from multiple accounts.](#) If your company has several Oracle Content Management accounts, you may be a member of more than one service.

[Get notifications](#), letting you know when the conversations you're active in are changed. You can customize what notifications you'll receive so you can follow only those conversations that are important to you.

[Share your files and folders](#) and [collaborate with other users through conversations](#) just like you do when you use a web browser.

If you have any problems, check the sync activity and try to resync, or refer to the [troubleshooting section](#).

Set Up Local File Sync

Oracle Content Management keeps your files safe in the cloud while allowing you to conveniently sync them to a local account folder. This lets you work on your computer as you like, and is useful in several situations:

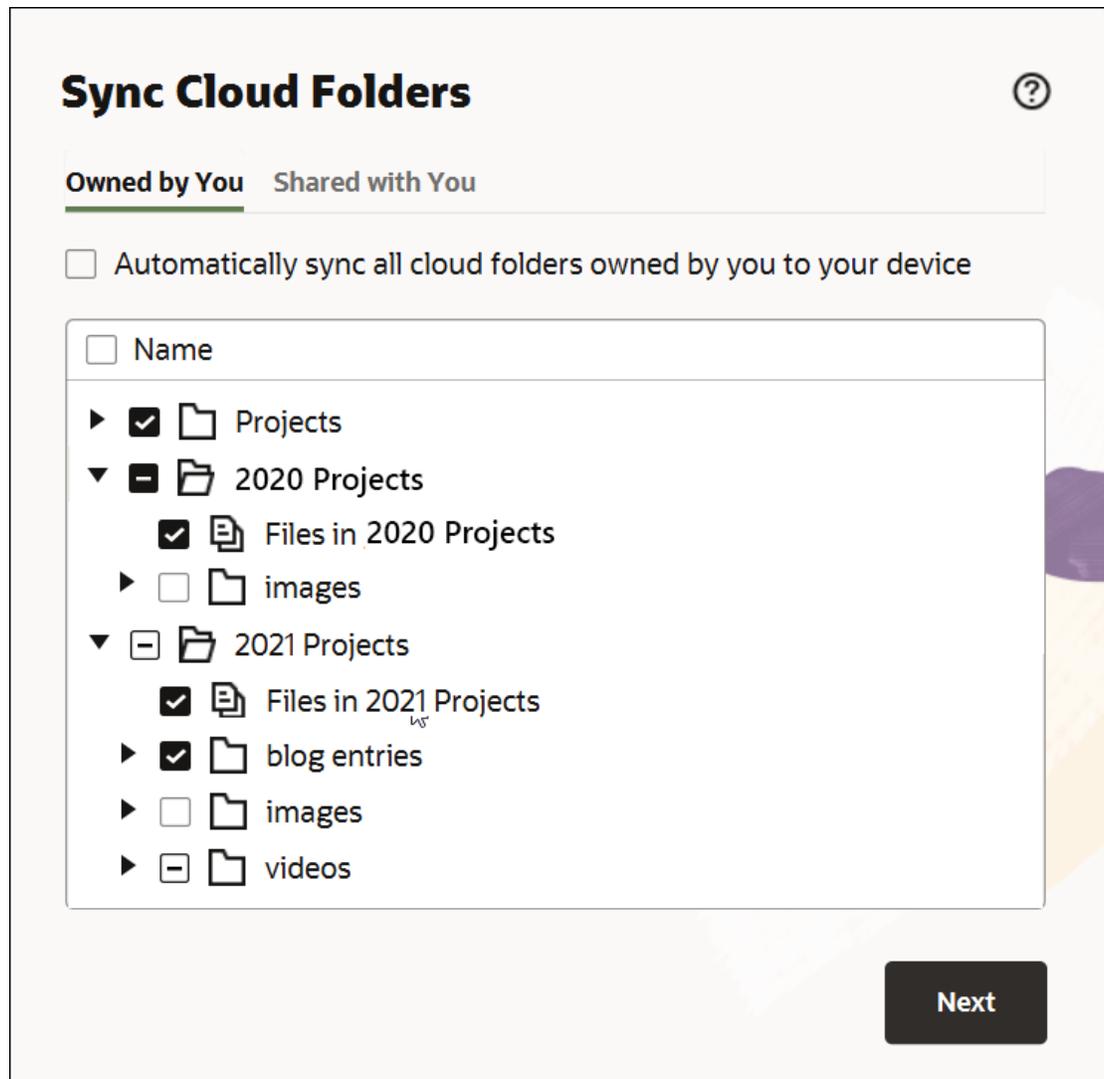
- while traveling without access to the cloud.
- if working on multiple computers.
- when uploading a folder with multiple files.

To set up local file sync, you first have to make sure that [desktop sync is installed](#). It may come pre-installed or you may need to download and install from your Oracle Content Management cloud account.

Choose Folders to Sync from the Cloud to Your Local Account Folder

When desktop sync is installed, an account folder is created where local copies of all cloud folders you choose to sync are stored. You can explicitly choose the cloud

folders to sync by clicking  to open sync activity and then click , and select **Choose Folders to Sync from Cloud** to open up the folder sync dialog.



Folders listed in the dialog are already in your cloud account. By default all cloud folders owned by you are synced automatically. Uncheck the folders you don't want to sync.

 **Note:**

Synced folders copy files from the cloud to your local hard drive. Depending on how your [preferences are set to handle unsynced content](#), unchecking a folder may not remove the files from your hard drive. To remove unsynced files to save space, review your preferences to see how unsynced content is handled and if necessary, locate the files to remove.

If no folders are listed as **Owned by You**, then you need to copy or create them locally in your account folder, or in the cloud using your web browser.

If there are cloud folders that you don't own but others have shared with you, click the **Shared with You** tab to select the ones you want to sync. You must have at least a Downloader role in a shared folder for it to appear in your list of folders for syncing.

Sync Subfolders and Files

If you want to sync subfolders but not entire cloud folders, there are a couple of ways to do it. You can either unselect the cloud folder then select the subfolders you want to sync, or you can leave the cloud folder syncing everything and just unselect the subfolders you don't want to sync. The way you choose determines the sync behavior.

If you uncheck a folder so the checkbox is empty then check a subfolder to sync , the checkbox of the folder that contains the subfolder (called the parent folder) changes to white with a dash . This means that the selected subfolder will sync, but any folder that gets added in the cloud to the parent folder later will not sync.

If a folder is checked so the checkbox is black with a white check and you uncheck a subfolder , the checkbox of the parent folder changes to black with a white dash . This means that the unchecked subfolder will not sync, but anything that gets added to the parent folder later will sync.

Parent Folder Selection State	Sync Behavior
<input type="checkbox"/>	No subfolders or items in the parent folder will sync.
<input checked="" type="checkbox"/>	All subfolders and items in the parent folder will sync. New additions to the folder will also sync.
<input type="checkbox"/>	Only subfolders and items specifically selected in the parent folder will sync. New additions to the parent folder will not sync.
<input type="checkbox"/>	Subfolders and items specifically deselected in the parent folder will not sync. New additions to the parent folder will sync.

Install and Configure the Desktop App

Your desktop app may have come pre-installed on your computer. If so, you may need to [set it up](#). Otherwise, to install and configure the desktop app:

1. After signing in to the Oracle Content Management web client, click your user avatar in the top right, then click **Download Apps**.
2. If necessary, select the appropriate operating system, then click **Download**, and save the file.
3. Take note of your server URL. You'll use this to sign in and set up your account after the app is installed.
4. When the file is done downloading, open it and follow the instructions to install. When finished installing, launch the app.
5. Enter the server URL you noted earlier. You will be prompted to sign in.

A local account folder is set up named after the account. This is the location where your synced files will be placed.

After you have successfully signed in, you need to set up your account by selecting which [folders you want to sync](#). By default all cloud folders owned by you are synced automatically, but you have to click the **Shared with You** tab to choose to sync shared folders you don't own.

By default, the desktop app starts automatically when you turn on your computer. This can be changed in your [preferences](#).



Set Notifications and Preferences

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

- Right-click  in the notification area (Windows) or in the menu bar extras area (Mac).
- Click  to open sync activity and then click .

To check and change your preferences, choose **Preferences** from one of the menus. Preference settings are available in the following categories:

- Sync
- Problems
- Notifications
- Status Icons
- Office
- Accessibility
- Advanced

Sync Preferences	Description
Deleted and Stopped Content <ul style="list-style-type: none"> • Recycle Bin (Windows) • Sync Trash folder (Mac) 	<p>By default this preference is set to move content that is no longer being synced into a folder called Sync Trash. The Sync Trash folder is in your local account folder and makes it easier to recover files in some situations. For example, you may lose access to files if someone stops sharing a folder you were syncing. Or someone may have mistakenly deleted or moved files in the cloud that you were syncing. Your local content is moved to the Sync Trash folder in those situations. This makes recovering the content easy, but also takes up local disk space until you delete the files from the Sync Trash folder. You can empty this folder at any time if you are confident there is nothing you wish to recover.</p> <p>If you select Recycle Bin on Windows, folders that are no longer being synced will be moved to your Windows system recycle bin. This can save local disk space when the recycle bin is emptied, but depending on your recycle bin properties, any content that you lose access to might be permanently deleted from your local account folder without giving you the option to recover it.</p> <p>Similarly, if you select Trash on MacOS, folders that are no longer being synced will be moved to your trash and might be permanently deleted when the trash is emptied.</p>
Deleted Folders <ul style="list-style-type: none"> • Stop syncing • Delete in the cloud 	<p>Choose what sync should do when you delete a folder on this device. Selecting Stop syncing keeps the synced folder in the cloud. Selecting Delete in the cloud puts the deleted folder into the cloud trash.</p>

Sync Preferences	Description
Moved Folders <ul style="list-style-type: none"> • Stop syncing • Delete in the cloud 	Moving folders out of your account can be treated differently than deleting a folder. Selecting Stop syncing here keeps the synced folder in the cloud. Selecting Delete in the cloud puts the moved folder into the cloud trash.

Problems Preferences	Description
Disk Space	Specify the amount of disk space (in megabytes) that is required for files to sync. If space drops below the specified amount, sync will stop. Files cannot then be downloaded from the cloud, which will show as a sync problem.

Notifications Preferences	Description
Accounts	Specify to be notified when an account goes online, offline, and requires sign in.
Documents	Specify to be notified when a folder is shared with you, a file you uploaded is infected with a virus, or if your storage quota has been exceeded. Also specify to be notified if actions you take that delete files and folders in the cloud or causes folders to stop syncing.
Conversations	Specify to be notified when someone posts in a conversation you're a member of.

Status Icons Preferences	Description
Sync Status Icons	Windows File Explorer lets you specify a status column in the synced folders in your account. Icons in the status column indicate if a file is syncing, pending sync, is locked, or has sync problems. In some situations sync status icons can get stuck on the sync pending icon. Click Repair Icons to fix if you think this may be happening.



Note:

If your account folder syncs a large number of files or a number of large files, repairing icons can take some time.

Office Preferences	Description
Microsoft Office Addin	You can enable the Oracle Content addin so you can share, lock and unlock, view file properties, and start conversations about files in Oracle Content without leaving your Microsoft Office application, such as Outlook, Word, Excel and PowerPoint.
Radial Menu	Show or hide the radial menu that appears when you use Microsoft Office programs such as Word or Excel. This feature is available on Windows only.
<hr/>	
Accessibility Preferences	Description
Dynamic Sync Activity	Enable dynamic sync activity to have the sync status update automatically in real time in the sync activity list. Disable to manually refresh the sync status list by pressing F5 on your keyboard.
<hr/>	
Advanced Preferences	Description
Performance	Choose an option based on your hardware capabilities and your sync needs. For example, if you are using a desktop with a fast processor, or you are syncing large amounts of files on a dedicated computer, you may want to select High for the fastest sync rate. Or if you are syncing to a laptop with a slower processor while working in several other applications, you may want to select Low for a slower sync rate but minimal impact to your work. Medium is the default priority. Options are: <ul style="list-style-type: none"> • Low—Sync rate is slowest and other apps are unaffected • Medium Low—Sync rate is moderate and other apps may be affected • Medium—Sync rate is typical and other apps are slightly affected • Medium High—Sync rate is fast and other apps are moderately affected • High—Sync rate is fastest and other apps are affected
Startup Start Oracle Content on login	Enabled by default, this option starts the app automatically when you sign in on your computer. If you disable this option, you will need to manually start Oracle Content in order to sync files.
Updates	Enable to automatically check for updates.
Site Assets Enable syncing sites assets	Enable to show the Site Assets tab on the desktop sync dialog if you are a site developer and have been syncing site assets such as templates, themes, and components.

Sync Your Files

By default all cloud folders owned by you are synced automatically. If you have a lot of files, this may take a while the first time you sync. If there are folders in the cloud that you don't actively work with, or if there are folders you don't own that others have shared with you, you may want to choose what folders to sync.

To choose what folders to sync, click  to open sync activity and then click , and select **Choose Folders to Sync from Cloud** to open up the folder sync dialog.

You can also open the dialog by right-clicking  in the notification area (Windows) or in the menu bar extras area (Mac) and selecting **Choose Folders to Sync from Cloud** from the contextual menu.

In the dialog, you can opt to automatically sync all the folders you own or you can choose folders to sync, including those shared with you. You don't have to do anything more. The desktop app is "set and forget" software. It runs until you tell it to stop.

If you want to [sync subfolders](#) but not entire cloud folders, there are a couple of ways to do it. You can either unselect the cloud folder then select the subfolders you want to sync, or you can leave the cloud folder syncing everything and just unselect the subfolders you don't want to sync. The way you choose determines the sync behavior.

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

Storage Location

When you initially signed in, a local account folder was created for you by default named Oracle Content. If you have only one account, this is where your synced files are stored and where you add files and folders you want synced to the cloud. To view

the contents, right-click  in the notification area (on Windows) and select **Open in Explorer** or in the menu bar extras area (on Mac) and select **Open in Finder**.

If you are a member of multiple services and sync more than one account, then your synced files are stored in a folder that you name when you [add each account](#).

In Windows, the default location for all local account folders is:

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

On a Mac, the default location for all local account folders is:

- /Users/USER_NAME/Oracle Content-Accounts

You can change the location of any local account folder using the sync activity dialog.

1. Click  in the notification area (Windows) or in the menu bar extras area (Mac) to open the sync activity.
2. Click  to open the **Accounts** dialog.
3. Hover over the account to change and click , then select **Edit**.
4. Click **Change Location** and navigate to the place you want the local account folder.
5. Once you've selected a new location, click **Done**.

Note:

You can't move the location to an external drive.

Sync Files in Multiple Accounts

If you are a member of multiple services, you may need to sync more than one account. You can display the Accounts dialog to add and edit multiple accounts by clicking  on the sync activity dialog or right-clicking the  in the notification area (Windows) or in the menu bar extras area (Mac) and selecting **Accounts** from the contextual menu.

You can set up a maximum of five separate accounts, so that you can sync with each Oracle Content Management account you have.

To add an account from the Accounts section of the sync activity dialog:

1. Click **Add New Account** to open the Add Account dialog.
2. Enter the service URL of the account you want to add.
3. Enter the user name and password for the account.
4. Add an account name. The account name is used for the folder created on your computer that holds the synced files.
5. Click **Done**. The account is listed in the Accounts section of the sync activity dialog.

By default all cloud folders owned by you are synced automatically, which can take some time initially. If you want to limit the folders to sync, or choose to sync folders that others have shared with you, see [Sync Your Files](#).

If you need to edit any account information, including where the local account folder is located, hover over the account in the Accounts section of the sync activity dialog and click , then select **Edit**.

In the Edit Accounts dialog you can change the account name, the service URL, and the local account folder location.

Work with Synced Files

You manage many of the same sync tasks using one of several methods.

- Right-click  in the notification area (Windows) or menu bar extras area (Mac) to access a context menu.
- Right-click a folder or file in your local account folder to access a context menu that has some sync tasks. Select **Oracle Content** in the context menu to access most sync tasks.
- Click  to open the sync activity dialog and click  to access most of the same options found in the context menus. A few options in the sync activity dialog are accessed using icons on the title bar.

Typical tasks and options are detailed in the following table.

Task	Description
Sync folders from the cloud	Select Choose Folders to Sync from Cloud and click the checkbox for items to sync. To stop syncing, de-select an item.

Task	Description
Pause sync of all folders	<p>Most of the time you can let the desktop app do its job and always sync your files. But sometimes you may want to temporarily pause sync if you have a slow connection and need to improve the performance of other online tasks. For example, you may want to pause sync if the online training video you are viewing is stuttering, or if a download keeps failing.</p> <p>Access the sync menu using one of the above methods and choose Pause All Sync. To resume sync, choose Resume All Sync.</p> <p>When you resume sync, changes you made during the pause are applied, and any conflicting changes in the files need to be fixed.</p>
Initiate a sync	<p>Select Sync Now.</p>
Stop syncing a specific folder	<p>If you want to stop syncing a specific folder in your local account folder, you can right-click the folder and select Oracle Content then Stop Sync. This is the same as deselecting the folder in the Choose Folders to Sync from Cloud dialog.</p> <p>If you stop syncing a folder on a computer, the folder and its files are removed from the local account folder on that computer. Nothing is lost because the folder and its files remain in the cloud and on any other computer you have synced. You can restart sync of the folder later.</p>
	<div style="border-left: 2px solid #0070C0; border-right: 2px solid #0070C0; border-bottom: 2px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> Note:</p> <p>If you mistakenly choose a folder to sync and then stop syncing the folder shortly after, it's possible content in the folder didn't finish syncing, and so not all the content gets to the cloud. If this happens and you've set Oracle Desktop to move unsynced content to the Windows recycle bin, it's possible some content could be permanently deleted, depending on your recycle bin settings and available storage space. To avoid this, set Oracle Desktop to move unsynced content to the Unsynced Content folder, where it can easily be restored. The Unsynced Content folder is found in the Oracle Content folder of the account.</p> </div>
Delete a local folder and its content from the cloud	<p>If you want to delete a specific folder and content in your local account folder from the cloud, you can right-click the folder and select Oracle Content then Delete from Cloud to send the folder to your Trash folder in the cloud.</p>
Investigate sync problems	<p>Select Sync Problems. To view sync problems for a specific folder, right-click the folder in the local account folder and select Sync Problems from the right-click menu.</p>
Go to a local account folder	<p>From the context menu on Windows, select Open in Explorer. From the context menu on a Mac, select Open in Finder.</p> <p>From the sync activity dialog, click .</p> <p>If you sync to multiple accounts, choose the account folder to open.</p> <p>If you want to open a specific local folder that is listed in the sync activity dialog, or that contains an item listed in the sync activity dialog, click the title.</p>

Task	Description
Open the cloud version of a folder	<p>From the context menu, select Open in the Cloud.</p> <p>From the sync activity dialog, click .</p> <p>If you sync to multiple accounts, choose the account folder to open.</p> <p>If you want to open a specific cloud folder that is listed in the sync activity dialog, select it, click , then select Open in the Cloud.</p> <p>If you want to locate a specific file listed in the sync activity dialog, select it, click , then select Open Location in the Cloud.</p>
Stop all notifications	Select Disable Notifications to prevent all your notifications from appearing (for example, during a conference call or a webinar). To start them again, select Enable Notifications .
Collaborate with others	Right-click a file or folder in your local account folder, select Oracle Content and then Conversation . A conversation associated with the file or folder is opened in your web browser that you can use to comment on content, flag others, and get people involved in real time.
See the properties of a folder or file	Right-click the file in your local account folder, then choose Oracle Content and then Properties .
Stop sync activity dialog animations	<p>If your sync is running slowly or if you want to stop animations on the sync activity dialog for some other reason, open sync activity and click  then select Disable Animations.</p> <p>To restart animations, select Enable Animations.</p>
Edit an account	<p>From the notifications area context menu, select Accounts.</p> <p>From the sync activity dialog, click .</p> <p>Select the account to edit and click . Select Edit to change the account name, location of the local account folder, and service URL.</p> <p>It may be useful to put your content on a drive with a large amount storage space. If you move an account folder to a different drive, you must re-sync all the folders.</p>
Remove an account	<p>From the notifications area context menu, select Accounts.</p> <p>From the sync activity dialog, click .</p> <p>Select the account to remove and click . Select Remove to no longer sync the account to the desktop. Removing an account does not delete any content from the cloud or local account folder. Instead, the local account folder is no longer synced to the cloud account and the local name is changed to specify that it is removed. This means that any changes made to items in the local folder after the account has been removed will not be synced with the cloud.</p>

Task	Description
Repair an account	<p>In some rare instance you may have sync problems that persist and are difficult to resolve. You may want to repair an account or folder. If the account is large, or the individual folder is large, repair can take a long time. It's a good idea to try to initiate a sync first to see if that resolves the problem. If it does not, you can try to repair the account or individual folder.</p> <p>To repair an account:</p> <ol style="list-style-type: none"> 1. From the system tray context menu, select Accounts. 2. From the sync activity dialog, click . 3. Right-click on the account to repair or select it and click . 4. Select Repair.
Save a log file showing the sync transactions on your desktop	Choose Troubleshoot from the Help menu then choose Save Logs .

The following options can be accessed by finding the item you want in the local account folder on your desktop, and right-clicking on the file or folder.

Task	Description
Lock a file	Select Lock . You can also lock a synced file by opening the file and clicking  on the radial menu when editing a Microsoft Office file.
Share a synced file or folder	You can add members to a folder or send a link to a file or folder the same way you do when using a web browser or mobile device. Right-click on the item name in the desktop folder and choose Members or Share Link in the Oracle Content context area.
See the properties of a folder or file	Select the file in your local account folder, then choose Oracle Content and then Properties .

Share Files and Folders

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

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

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

You can even add external users who may not be a part of your organization to a folder, provided your service administrator allows it and their email address is

registered with your service. External users can collaborate on objects to which they're given access, but they cannot be assigned the manager role. This safely limits their ability to create and remove content.

See [Share Files and Folders](#) for more details.

Use Conversations

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

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

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

4

Work with Microsoft Office

When you install the desktop app, an add-in for Microsoft Office 2016 or later versions is automatically installed so you can work with synced files directly from Microsoft Office. If your system administrator enabled Microsoft Office Online integration, you can work in Microsoft Office Online directly from the web client.



Note:

Microsoft Office Online integration isn't supported in private instances.

Microsoft Office and Microsoft Office Online integration enable you to perform the following tasks:

- [Create new Microsoft Office files](#) from the Oracle Content Management web client.
- [Edit Microsoft Office files](#) that are stored in Oracle Content Management.
- [Use the radial menu](#) that shows up when you're working in any synced Microsoft Office file to quickly access Oracle Content Management features directly from Microsoft Office.
- [Embed links](#) to your synchronized documents, folders, or most recently used conversations into Microsoft Outlook email messages and calendar appointments.
- [Save files](#) directly from Microsoft Office to your synced desktop folder.



Note:

If you install Microsoft Office after you install the desktop app, you'll need to reinstall the desktop app to get this functionality. It's only installed if Microsoft Office is present on your computer. For other issues, refer to the [troubleshooting section](#).

Create Microsoft Office Files in the Web Client

You can create new Microsoft Office files directly from the Oracle Content Management web client.

To create a new Microsoft Office file:

1. In the Oracle Content Management web client, browse to where you want to create a new file and click **Create**, then select the type of Microsoft Office file you want to create. You can create a Word, PowerPoint, or Excel file.
2. Enter a name and description (optional) for your file, then click **Create**.
3. If you haven't already signed in to Microsoft Office Online, you'll be asked to do so. The new file is saved to the Oracle Content Management folder from which you created the file. To return to the folder, click the link in the toolbar.

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

- Try to keep file uploads smaller than 5 GB. Some web browsers can't process files bigger than that.
- If someone shared a folder with you, you must have at least a Contributor role in the folder to be able to create a file there. If you have a lesser role, you won't see the option to create a file.
- A new version of the file is created each time the file is autosaved.

Edit Microsoft Office Files

You can edit Microsoft Office files directly from the Oracle Content Management web client.

There are several ways to edit Microsoft Office files that are stored in Oracle Content Management:

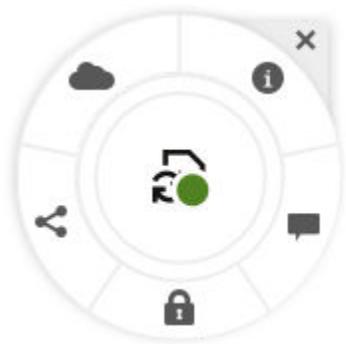
- **Download:** In the web client, select the file, download it to your computer, edit it in the associated program on your computer, then upload a new version to the web client.
- **Desktop client from web browser:** If you've installed the desktop client, you can edit it directly from the web client. In the web client, select the file, and click **Edit**. The desktop client will open the file in the associated program on your computer. When you finish editing, save the file as you normally would. If you're already syncing the file, any changes you make to the file will be synced to Oracle Content Management. If you didn't sync the file beforehand, the newly synced file is stored in your **.download** folder in your Oracle Content folder on your computer.
- **Desktop client from file explorer:** If you've installed the desktop client and you've synced the file to your computer, you can edit the synced file directly from your file explorer as you would any file. The file will open in the associated program on your computer, and any changes you make to the file will be synced to Oracle Content Management.
- **Microsoft Office Online:** If your system administrator has enabled Microsoft Office Online integration, you can edit the file in Microsoft Office Online directly from the web client. In the web client, select the file, then click **Edit in [Office] Online** (for example, "Edit in Word Online"). The file will open in Microsoft Office Online, and any changes you make to the file will be synced to Oracle Content Management.
If you've installed the desktop client, you can instead edit the file on your computer by clicking **Edit in [Office] (desktop)** (for example, "Edit in Word (desktop)").

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

- Try to keep files smaller than 5 GB. Some web browsers can't process files bigger than that.
- If someone shared a folder with you, you must have at least a Contributor role in the folder to be able to edit a file there. When you edit a file you are uploading a new version of the file to the folder.
- A new version of the file is created each time the file is autosaved.

Use the Radial Menu

When using Microsoft Office 2016 or later versions on a PC, a quick-access radial menu is installed automatically when you install the desktop app. This menu appears whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access Oracle Content features directly from the file. You can view the properties of a file, lock, unlock or share the file, view conversations associated with the file, or open the file in Oracle Content in your web browser.



To hide the menu, click the X. To reinstate the menu from a Microsoft Office file, click **File**, then click **Oracle Content** and then **Preferences**. You must have Oracle Content set as a storage location first. See [Use Oracle Content as a Storage Option](#) for details.

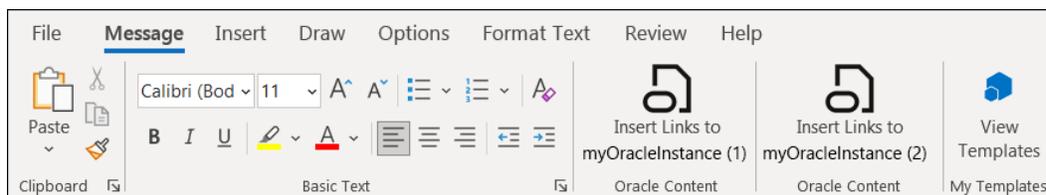
You can also show or hide the menu by right-clicking on the desktop app icon in your notification area on your computer. Choose **Preferences** and then **Hide Radial Menu** or **Show Radial Menu**.

Add Links Using Microsoft Outlook

If your email administrator has installed and configured Oracle Content Management for Outlook on your Microsoft Exchange server, you can easily embed links to your Oracle Content files and folders into email messages or calendar appointments.

To add a link:

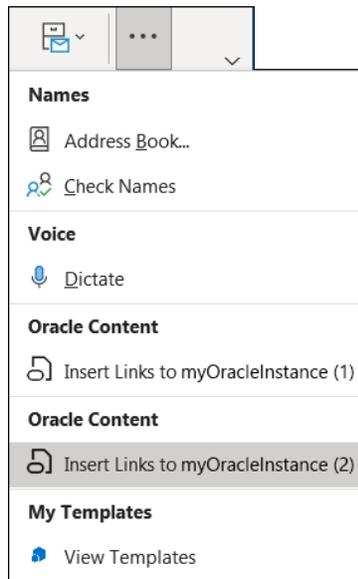
1. Open Microsoft Outlook and compose a message or create a new appointment.
2. Click **Insert Links to myOracleInstance** in the message or meeting tab of the ribbon. Note that your instance will be named by your service administrator when they create the instance.



You may need to click ******* in order to see the **Insert Links to myOracleInstance** option under the **Oracle Content** section.

 **Note:**

If your service administrator has enabled the Outlook add-in on multiple instances of Oracle Content Management to which you have access, you will see an Oracle Content section in the message or appointment ribbon for each Oracle Content Management instance to which you have access.



A panel opens in Outlook showing the Documents page of Oracle Content Management. You may be prompted to log in to Oracle Content Management prior to displaying the Documents page.

3. In the panel, navigate to and select the item or items you are sending a link to. Then click **Next**.
4. Accept the default link options regarding the permissions for each link, the link name, expiration date, or access code, or click **Edit Link Options** to make changes.
5. Click **Insert**. The names of each document or folder is added to your email message or appointment as a link.

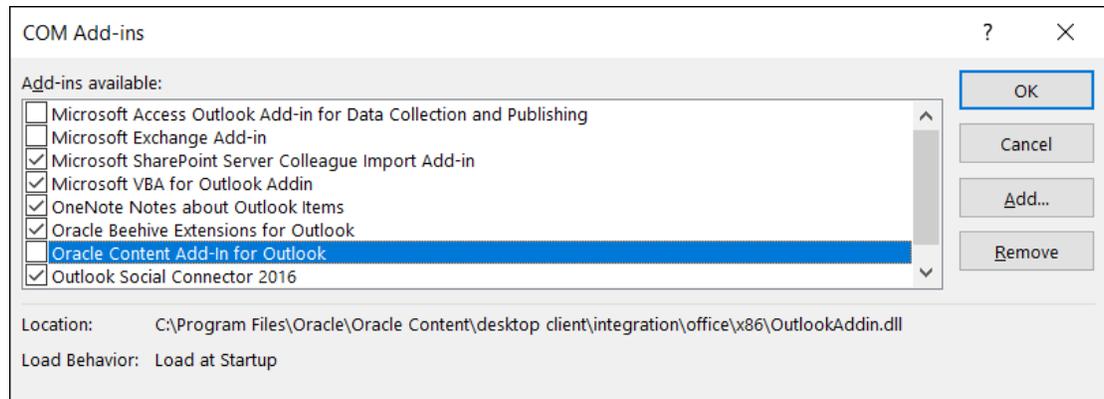
Disable the Desktop Add-In for Microsoft Outlook

The ability to share links to items managed by Oracle Content Management via email or appointment in Microsoft Outlook is now enabled and configured by a service administrator. Previously, however, you installed this ability in Microsoft Outlook when you downloaded and installed the Oracle Content Management Desktop app. To avoid confusion when using the new feature enabled by your service administrator, it is best to disable the previously installed Desktop add-in for Microsoft Outlook.

Disabling the add-in is easy.

1. Open Microsoft Outlook.
2. Click **File** and select **Options**.

3. Select **Add-ins** in the left navigation and click **Go** next to **Manage COM Add-ins**.
4. Locate **Oracle Content Add-in for Outlook** in the list of available add-ins. You may need to scroll to find it.
5. Uncheck the box to disable it and click **OK**.



Note:

If you have administrator rights to your computer, you can remove the add-in completely by selecting it and clicking **Remove**.

Use Oracle Content as a Storage Option

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

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

5

Work with Oracle Content Management for Slack

If your service administrator has configured Oracle Content Management to integrate with Slack, you can post [links to files and folders](#) you own into Slack messages directly. If you have the rights to do so, you can also link to files and folders that are shared with you. This means that you can use [public and member links](#) within a Slack message without having to first create the links in the Oracle Content Management web interface and copy them into Slack.

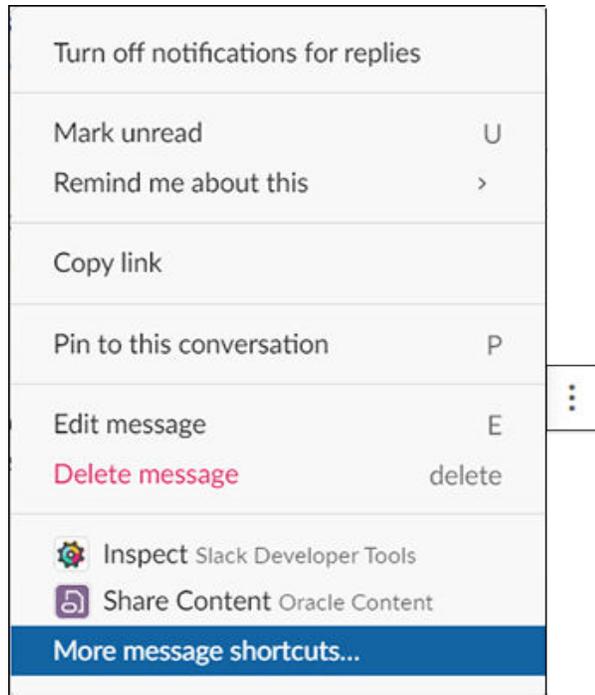
Once your service administrator has integrated Slack with Oracle Content Management, you need to authorize Slack to access your Oracle Content Management instance, and then allow Oracle Content Management access to a specific Slack workspace. Lastly, you must allow Oracle Content Management for Slack to list files and folders in your messages.

- [Invoke the Oracle Content Management for Slack App](#)
- [Authorize and Allow Slack and Oracle Content Management Access](#)
- [Post Links to Oracle Content Management in Slack](#)

Invoke the Oracle Content Management for Slack App

You can invoke Oracle Content Management for Slack in one of three ways:

- using a global shortcut from the composer menu or search result.
- using a slash command found in the composer menu or entered directly into the message box.
- using a message shortcut found in the message context menu.



It's easiest if you know the name of the global shortcut that your service administrator has set up to access Oracle Content Management for Slack application, or the slash command used to find it.

 **Note:**

A slash command is a shortcut Slack uses for specific actions. It is entered into the message box and begins with a forward slash (/) followed by the command.

To invoke the app using a global shortcut:

1. Click  below the message box and then click **Browse all shortcuts**.
2. Find the name of the Oracle Content Management for Slack app and select it. A list of all supported shortcuts and slash commands are displayed.
3. Browse through the list or use the search field to find the global shortcut to invoke the app and select it. The shortcut is displayed in the message box.
4. Click . If you don't know what shortcut to use, contact your service administrator.

To invoke the app using a slash command:

1. Enter the command in the message box, starting with a / and followed by the command, for example, `/sharecontent`. If you don't know the correct slash command, ask your service administrator or click **Browse all shortcuts** to find it. Use the search field to refine your search.

2. Select the slash command for your Oracle Content Management instance and click . To invoke the app using a message shortcut:
 1. Hover your cursor over a message to display a menu bar at the top of the message.
 2. Click  in the menu bar. Message shortcuts are listed at the bottom of the context menu.
 3. If the shortcut you need is not listed, click **More message shortcuts** to scroll through a list of shortcuts or search.
 4. Browse through the list or use the search field to find the message shortcut you want. If you don't know what shortcut to use, contact your service administrator.

Authorize and Allow Slack and Oracle Content Management Access

The first time you invoke the Oracle Content Management for Slack app, you'll need authorize access to your Oracle Content Management instance.

1. [Invoke the Oracle Content Management for Slack App](#).
2. Click **Authorize Slack** in the Slack message to give Slack access to your Oracle Content Management instance. The authorization page is displayed in your browser.
3. Select the Slack workspace to be used from the choice list in the upper right corner of the authorization page and click **Allow** to give Oracle Content Management access to your Slack workspace. The Oracle Content Management for Slack authorization dialog is displayed.
4. Click **Allow** to give Oracle Content Management for Slack permission to list Oracle Content Management files and folders and post links in your Slack messages.

Note:

After you have allowed access, you will need to [reinvoke](#) the Oracle Content Management for Slack app.

Post Links to Oracle Content Management in Slack

Once you've authorized access between Oracle Content Management and Slack, you can easily post links in Slack channels to the files and folders you have access to in Oracle Content Management. For example, if you used `/sharecontent` in Slack to access Oracle Content Management, now entering `/sharecontent` in the message box of a channel will display a dialog where you can select files and folders you want to link to in a Slack message. Access to the files from the Slack link will be determined by the permissions a person using the link has in Oracle Content Management.

You can use a slash command, global shortcut, or message shortcut to invoke the Oracle Content Management for Slack app. This allows you to post links in Slack Channels and direct messages to files and folders you can access in Oracle Content Management, but each way behaves differently.

- Using a slash command posts to the channel used to invoke the Oracle Content Management for Slack app. Also, you cannot use a slash command in a message thread.
- Using a global shortcut allows you to choose multiple channels and people to share a link. Using a global shortcut will always create a post in a channel or direct message, not a message thread. If you use a global shortcut while in a message thread, the post will be made to the channel or direct message that the message thread is in.
- Using a message shortcut will post links as a reply to the message used to access the message shortcut. This means there is no option to select a channel.

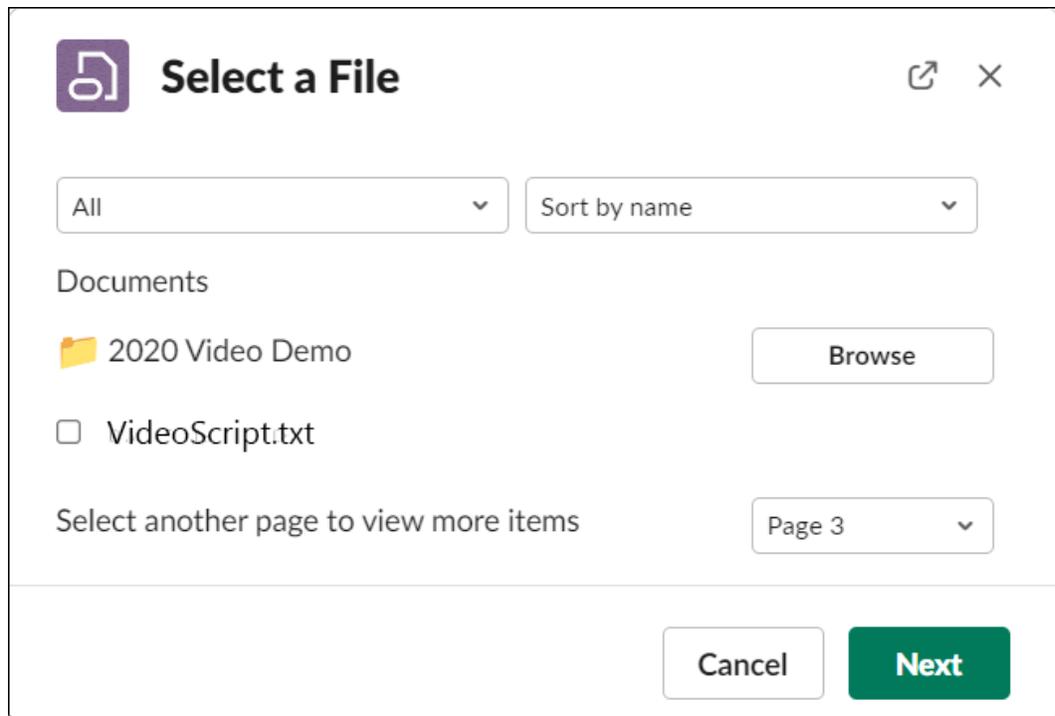
To post links to Oracle Content Management in Slack:

1. Invoke Oracle Content Management for Slack using a slash command, global shortcut, or message shortcut.
2. If you have invoked the app using a global shortcut, then you have the option of searching for and adding multiple channels and people following the slash command in the message box, in order to post the links to multiple people. Begin entering text in the message box and select the public (#) or private (🔒) channel or channels where you are posting the link, or the name of the person or people to whom you're sending the link in a direct message.
 - To search for people to send the link to in a direct message, enter @ and the person's name.
 - To search for either public or private Slack channels, begin the search with a #. Channels preceded by a # are public, channels preceded by a 🔒 are private.

 **Note:**

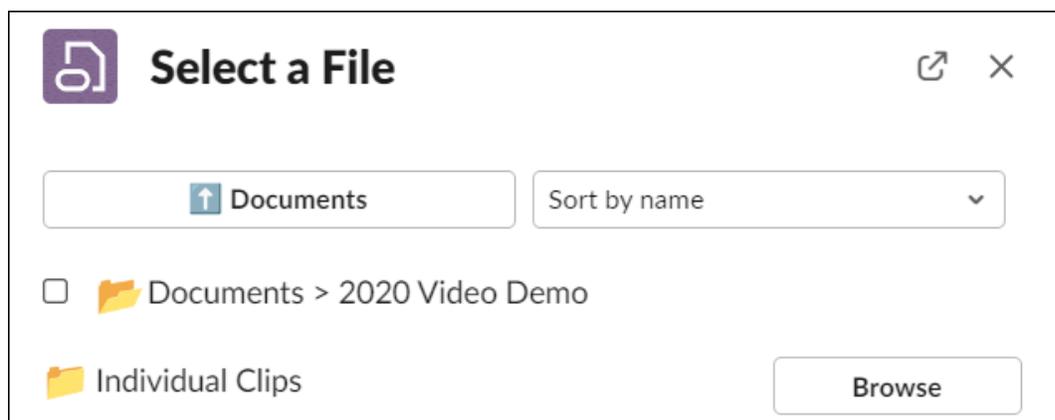
You can select multiple channels and people in combination to send the link.

3. Click . The **Select a File** dialog is displayed.



4. Select a file or files to link to. If you select multiple files, then multiple links are added to a message. If you cannot see the file you want to link to, scroll to the bottom of the dialog and if necessary, select another page in the choice list.

If you want to link to a folder or a file in a folder, click **Browse** next to the folder to open it and enable the checkbox next to the folder or file you want to link to.



To return to the previous folder, click  at the top of the dialog.

5. Once you've finished selecting files and folders to link to, click **Next**.
6. Choose the [type of link](#) (member or public). You can't create member links for files in the root folder.

Note: If you use a member link, access to the file is based on the user's role on the folder. If you use a public link, access to the file is based on the role set as the system-wide default set by your administrator or by the setting on the parent folder. The role is shown at the bottom of the dialog. To change the role or edit other link options, click **Show Link Options**.

- For member links, you can select whether the file opens online or downloads to the user's computer. If you select open online, the user's access is based on their role on the parent folder.
 - For public links, you can change the permission, select whether anyone can access the file or only registered users, set an expiration date, and set an access code to limit access to the link.
7. When you have finished, click **Submit**. The link or links are listed in your Slack message.

Share Links from Oracle Content Management to Slack Channels

If you're viewing files in the Oracle Content Management web interface, you can share links to that content directly to a specific Slack channel. Sharing a link to Slack is done much like [sharing a link using email](#), but you can choose to send it to a channel, a direct message, or both.

1. Select the file and choose **Share Link** in the right-click menu or click  in the actions bar.
2. Choose the **type of link** (member or public). You can't create member links for files in the root folder.

Note:

If you create a member link, access to the file is based on the user's role on the folder. If you create a public link, access to the file is based on the role set as the system-wide default set by your administrator or by the setting on the parent folder. The role is shown at the bottom of the dialog. To change the role or edit other link options, click **Edit Link Options**.

- For member links, you can select whether the file opens online or downloads to the user's computer. If you select open online, the user's access is based on their role on the parent folder.
- For public links, you can change the permission, select whether anyone can access the file or only registered users, set an expiration date, and set an access code to limit access to the link.

3. Select **Slack** from the **Send To** choice list.

Note:

The Slack option is only available if Slack integration has been enabled by a service administrator. If it has been enabled but the Slack app has never been used, a message is shown explaining how to first authorize the Slack app so you can post links directly to Slack.

4. If your service administrator has configured access to multiple Slack workspaces, you must select a workspace.
5. Select the public (#) or private (🔒) channel or channels where you are posting the link, or the name of the person or people to whom you're sending the link in a direct message (👤).
 - To search for people to send the link to in a direct message, begin entering the person's name.
 - To search for either public or private Slack channels, begin the search with a #. Channels preceded by a # are public, channels preceded by a 🔒 are private.

 **Note:**

You can select multiple channels and people in combination to send the link.

6. Add an optional message and when you've finished, click **Send Link**.

6

Work with Sauce Video

[Sauce Video](#) empowers businesses to collaborate with their communities of fans, employees and customers, reducing the complexity and cost of video creation. Teams can easily capture, collect, and create videos for a wide range of use cases, including marketing, sales enablement, recruiting, and employee engagement. The Sauce cloud-based platform makes [directing, sharing and editing video content](#) fast, easy and affordable on a global scale.

Oracle Content Management works with Sauce Video to manage videos, photos, scripts and audio files to create collaborative video projects. [Visit the tutorial](#) for help on getting started, and [see examples](#) of how to use Sauce Video.

Connecting your Sauce Video application with Oracle Content Management is easily done.

1. In the [Sauce Video](#) web interface, click your profile picture and select **Account** and then **Settings**.
2. Click + next to the Oracle Content section.
3. Enter the URL for your Oracle Content Management instance and click **Connect**. If you are uncertain what URL you should enter, see the welcome email you received for your Oracle Content Management account, or check with your service administrator.

Your Sauce videos can now be stored and managed in the repository you choose when [adding your Sauce projects to Oracle Content Management](#).



7

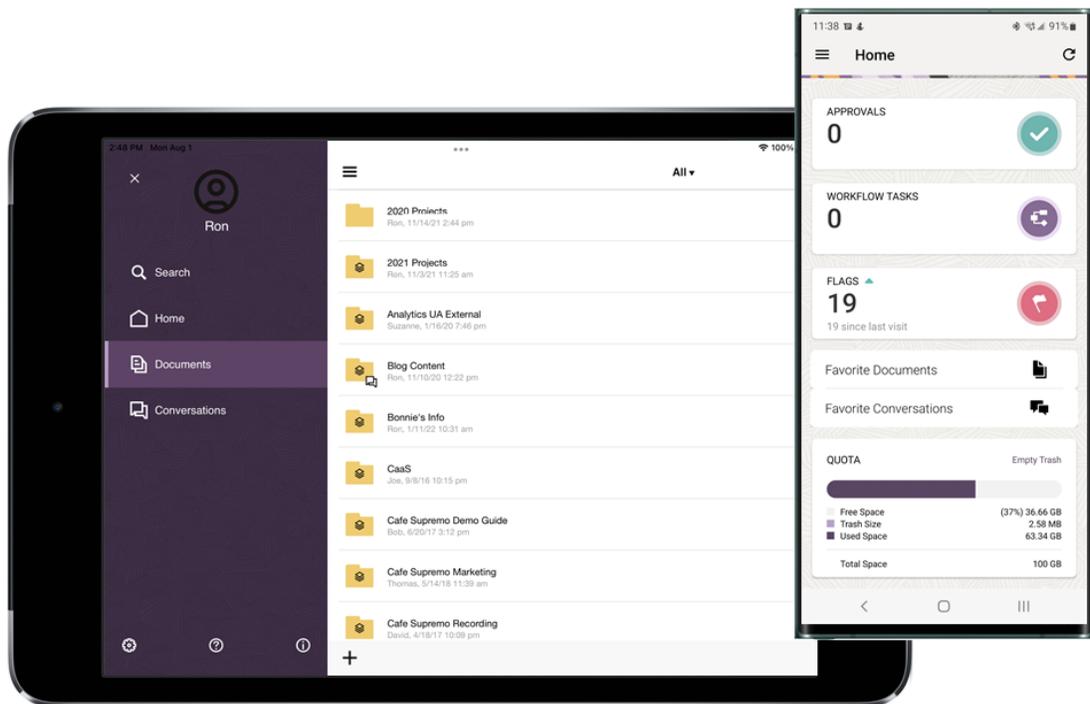
Use the Mobile Apps

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

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

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

After installing the mobile app, you can use it on your [Android device](#) or [iPhone/iPad](#).



Use the Android Mobile App

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

You can download the Android mobile app from [Google Play](#).

The Basics

- [Get to Know the Android Mobile App](#)
- [Sign In or Out](#)

- [Set a Passcode](#)
- [Access Multiple Oracle Content Accounts](#)
- [Manage Notifications](#)

Manage Content

- [Work with Files and Folders](#)
- [View Files or File and Folder Details](#)
- [Edit Files](#)
- [Upload Files and Media](#)
- [Download \(Sync\) Files](#)
- [Search Content and Conversations](#)
- [Use Assets](#)

Collaborate with Others

- [Share Files and Folders](#)
- [Use Conversations](#)

Troubleshooting

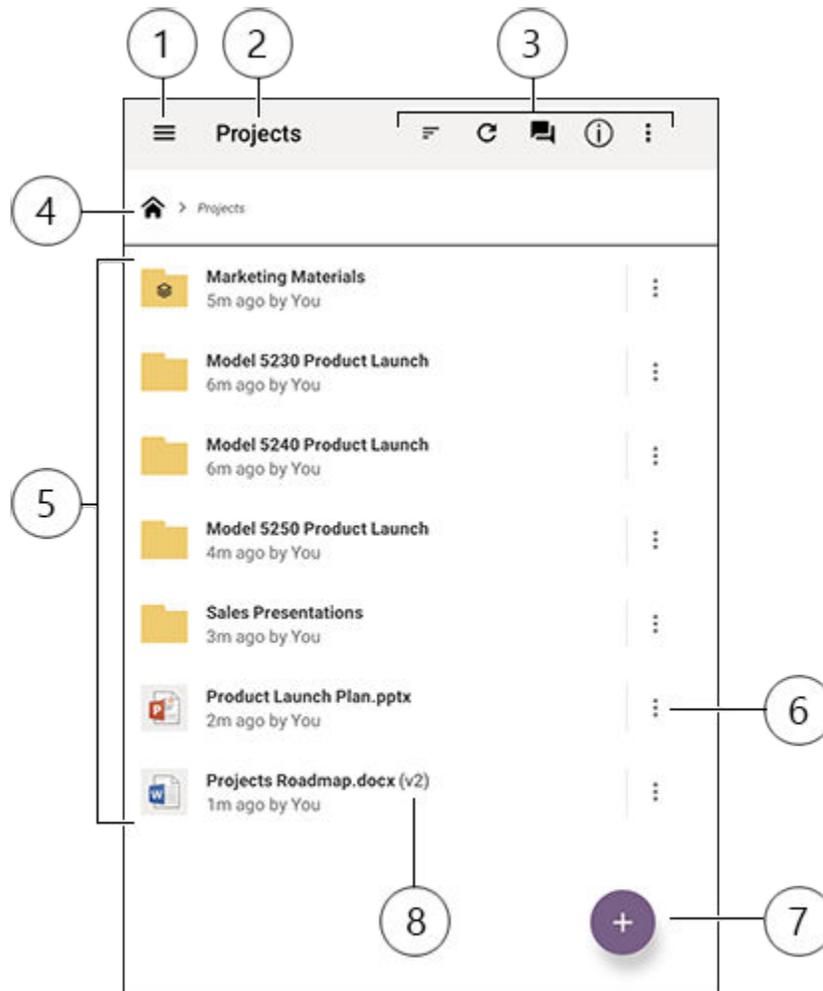
- [Troubleshoot Mobile](#)

Get to Know the Android Mobile App

Oracle Content Management gives you collaboration and content sharing on the go with the Android mobile app. Take a minute to learn how and where to find what you need.

When you launch the mobile app, you first see your dashboard (home page), with personalized information and links to your favorite documents and conversations. Tap  in the top left corner to see the navigation panel, from where you can go to your documents, conversations, or settings.

To help you find your way around, here's what the Documents page in the Android mobile app looks like:



Item	Description
1	Tap the show/hide icon to open or close the navigation panel, where you can go to your home page (dashboard), documents, conversations, or settings, and also search for content.
2	The name of the current folder. If you're at the top Documents level, you can filter your content, for example to show only folders that were shared with you or ones that you created yourself.
3	Icons that allow you to change the sort order or refresh your content. If you see three dots, you can tap them to see a menu of additional tasks that you can perform, such as share content, view properties, and add an item to your favorites.
4	Breadcrumb trail, so you can see where you are in your folder structure and navigate to parent folders.

Item	Description
5	A list of your files and folders in the cloud. The icons indicate what kind of content each item is (file or folder) and may also provide other helpful information. For example, the  overlay on a folder means that it's shared, while  means a conversation was started for a file. See Icon Quick Reference for an explanation of all icons.
6	Tap to show a menu of relevant tasks that you can perform for the item. For example, you may be able to view the item properties, edit tags, share an item, open an item with another app on your mobile device, or send it.
7	Tap to add a new item to the cloud from your mobile device. You can create a new folder or select a photo or other file on your device for upload.
8	Version indicator of a file. Oracle Content Management keeps all versions of your files, but will only show the latest one. You can access older versions through the file properties.

Sign In or Out

1. Tap the app icon on your device to open it.
2. Enter the URL of Oracle Content Management. You can find this in the welcome email that you received when you were added as a user to the service. You can also find it on the Download Apps page in the web application.
3. Enter your account information at the prompts. This information is also in the welcome email and on the Download Apps page.
4. Tap **Sign in**.

If you don't have an account, can't remember getting a welcome email, or forgot your login credentials, contact your service administrator in charge of managing your cloud accounts.

You're kept signed in on your device until you sign out or until your session expires.

To sign out, open the navigation panel, tap , and then tap **Sign Out**.

Set a Passcode

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

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

1. Open the navigation panel, and then tap  to access your settings.
2. In the **Security** section, tap **Enable Passcode**.
3. Enter the four digits to use as a passcode, then re-enter the digits to confirm. Tap **OK**.
4. Tap **Prompt for Passcode** and choose the amount of time that has to pass before you need to enter the passcode.
For example, if you choose *After 1 minute*, then you leave the app and return after more than one minute, you have to enter the passcode to use the app again.

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

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

 **Note:**

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

Access Multiple Oracle Content Accounts

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

1. Open the navigation panel, and then tap .
2. Tap **Add Account**.
3. Enter a name for the account, the service URL, and your user name and password.
4. Tap **Add** when done.

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

Manage Notifications

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

1. Open the navigation panel, and then tap  to access your settings.
2. Tap the account name that you want to customize.
3. Tap **Push Notifications** and choose the option you need.

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

Work with Files and Folders

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

To mark an item as a favorite, select or open it, tap , and tap **Add to Favorites**. You can also mark an item as a favorite from its properties page by tapping . To see a list of your

favorites, tap the drop-down menu next to the header on the Documents page and select **Favorites**.

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

View Properties	View the properties for the item and access other actions you can perform, such a locking, unlocking, or deleting an item. This is also where you can access the version history and review or create links to the item.
Open With... (files only)	Open the file in another app on your device.
Open Folder	Open the folder so you can see a list of its contents.
Favorite	Mark or remove an item as a favorite. To see a list of your favorites, open the drop-down menu next to the header on the Documents page, and select Favorites .
Preview (files only)	View a file.
Members	Share an item with others by adding them as members to the folder.
Share Link	Create a link to a file or folder that you can share with others.
Send (files only)	Send a copy of a file using an app on your device.
Sync (files only)	Keep your file copy synchronized with the copy in the cloud.
Lock/Unlock (files only)	Lock and unlock files.
Delete	Delete a file or folder.
Copy	Copy a file or folder to a new location.
Move	Move a file or folder to a new location.
Rename	Rename a file or folder.

Tips

Creating items

- If you're a member of a shared folder, you may not be able to create a subfolder in the shared folder.

Deleting items

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

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

Copying items

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

Locking files

- When you lock a file, other people will know the file is in use. You can check the properties for the file to see who locked it and when.
- Other people can unlock the file if they need to use it. If they do, you get an email telling you who unlocked it and when.
- If someone tries to upload a new version of a file you locked, they can unlock it and upload the new version. You'll be notified by email if that happens.

View Files or File and Folder Details

View Files

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

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

View File or Folder Details

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

See Version History

Oracle Content Management keeps all versions of your files, but only shows the latest one. To see the version history of a file, go to its Properties page, and tap **Version History**. You can delete versions or email versions of the file, or make an older file the current version. Tap  on the version you want to use to select those options.

Edit Files

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

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

1. In Word, tap **Open**.
2. Tap **Browse**. A list of places is shown.
3. Choose the Oracle Content account you want to use from the list.
4. Find the file you want to edit.
5. After editing the file, tap **Save** to save the file back to its original location or tap **Save As** to save it to a new location, either in the same Oracle Content account or a different account or location.

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

1. Find the file you want to edit. If you're online, you can find files through Browse, Favorites, or Search. When offline, you can choose files you've synced.
2. Tap  and then tap **Open With...**
3. Select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.
4. Edit the file as needed, and then tap **Save As** to save the file locally on your device.
5. When you're online, you can upload the local copy of the file back to Oracle Content from within the editing app if it has a **Send** option. Just tap **Send** and select Oracle Content as a location.

Upload Files and Media

1. Go to the location in the Documents area where you want to add the file.
2. Tap .
3. Tap .

4. Choose a file on your device to upload. You can add one or more tags (separated by commas) and also edit the file name or add a description (tap , then tap **Edit**).

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

You can upload files from one Oracle Content account to another. Say, you have two accounts: Corporate and SalesDept. You could sign in to your Corporate account, and select the option to upload a file. Then you could select Oracle Content as the location you want to choose from, select your SalesDept account, find the file you want to upload, and select a location in your Corporate account to store it.

Some apps may let you upload a file directly through the app. For example, some apps have a **Send** menu option that lets you select a file on your device and open it. You can then choose a location for the file and send it to Oracle Content so it's stored in the cloud.

Download (Sync) Files

Files that you download (synchronize) with Oracle Content are available even if you aren't connected to the Internet. For example, maybe you're going on a business trip and you want to view or edit a file while offline (say, on an airplane flight). By synchronizing the file, you can be sure that you can access the file regardless of your connectivity. When you sync a file, it's downloaded to a secure area within the Oracle Content app, and you can access it from within the mobile app, even if you're not connected to the cloud. For security reasons, it's not accessible outside the Oracle Content app, so you won't find it in your regular Android download folder or other folder on your device. You control how and when the local copy is kept up to date to ensure you have the latest version.

1. Find the file you want to synchronize.
2. Tap  and then **View Properties**.
3. Tap **Sync**.

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

To remove a synced file, long-tap the file, select it, and then tap the delete icon.

To immediately synchronize your selected files:

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

The files in the Offline area are updated to match the latest versions in the cloud. You can also tap  on the Offline screen, and then choose to unsync all files listed. Or you can tap  for an individual file and choose **Unsync** from the menu. If you unsync a file, its local copy is removed from your device. It remains untouched in the cloud.

You can have your files synchronized automatically:

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

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

Search Content and Conversations

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Type your search terms, and then tap Enter.

For example, if you search for the word "report", you'll find *Status Report 2019.xls* and *Report Logo.jpg*, as well as *Writing Instructions.doc* if the word `report` is in that document or conversation. You can filter your results by type (for example, by conversations or by files).

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

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- If you search for an item that has special characters in the name, the item isn't returned in the suggested search results for documents or folders.
- You can search for multiple terms by separating the terms with a comma or a space.
- To search for a phrase, use double quotes around the phrase. For example, "United States" returns files with the exact phrase `United States` in the file.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.
- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
 - `not` or the dash (-). For example, `Report2018,Report2019 -sales` returns `Report2018` or `Report2019`, but not items with the keyword `sales` in them.
 - `or` or a comma. For example, `Report2018 or Report2019` returns the same results as `Report2018,Report2019`.
 - `and` or a space. For example, `Report2018 and Report2019` returns the same results as `Report2018 Report2019`.

The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2018 and Report2019 not Report2019` returns nothing because `not` is evaluated first.

- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.
- The search is done on Favorite shared folders first and then other shared folders, up to 5000. If you have more than 5000 shared folders (either shared by you or with you), a global search may not return the expected results. If you think that's the case, you may want to designate some folders as Favorites before searching, to ensure better search results.
- If a file is larger than 10MB in size, it won't be included in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Use Assets

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

The following is a brief overview of how you can use assets on your mobile device.

Work with Assets

You can review an asset to either approve, reject, or comment on it using your mobile device. Asset approval might just change status, or, if your service and content administrators have configured Oracle Content Management to use additional workflow options, approval might be part of a workflow that changes status automatically.

Approve and Reject Assets

In the Home view, you see items that require simple asset approval in the **Approvals** tile, and you see items that require workflow approval in the **Workflow Tasks** tile. Tap the tile to view the items.

Approvals

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

When you're ready, tap  to approve the asset. Tap  to reject the asset.

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

Workflow Tasks

In the list of assets waiting approval, you see the due date (if there is one), a preview of the asset, details about the asset, and your workflow task.

To act on the workflow task, tap the workflow task name or . Select an action, optionally add a comment, and then tap **Submit**.

You can also take action on an item while viewing it by tapping  at the bottom of the screen.

To learn more about workflow, see *Use Workflows in Managing Assets with Oracle Content Management*.

Comment on Assets in Review

To post a comment when reviewing an asset, view the asset and tap  to see the annotation tools. When the tool bar is displayed, tap  in the tool bar then tap the asset to place an annotation in a specific location of a specific page. This opens the asset's conversation where you can post your comment.

Tap the  in the toolbar then tap-and-drag to select an area of the asset to highlight and annotate.

Tap the  in the toolbar and select a person to show posts by that person.

Once an annotation has been placed on an asset, tap  to highlight the post associated with the annotation. You can also tap a post in the conversation to see the annotation associated with the post.

Share Files and Folders

You can share individual files or entire folders directly from your mobile device.

You can share files and folders in the cloud directly from your mobile app by creating links to them. Then share those links with other people to give them access to your content. You control what other people can do with your shared files or folders: just view the item online, download the item, or modify the item. You can also set a link expiration date or access code. After creating a link, you can share it however you want to, for example by adding it to an email or send it in a text message.

You also share folders by adding members to them, which gives those people access to all the content in the folder and its subfolders. This is useful when you're working on a large project, for example, and people may need to continually access information.

See [Share Files and Folders](#) for more details.

Use Conversations

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

To start or view a conversation about a file or folder:

1. Find the file or folder you want to use for a conversation.
2. Tap .
3. Tap **Go to Conversation**. If a conversation doesn't already exist, one will be started for you.

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

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

1. Tap **Conversations** in the navigation panel.
2. Tap . A new, empty conversation is started for you.
3. Add the conversation name.
4. Tap **OK**.
5. To add members to the conversation, open the conversation and tap  and tap **Members**. Tap  to select people to add to the conversation.

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

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

Use the iPhone/iPad Mobile App

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

You can download the iOS mobile app from [Apple App Store](#).

The Basics

- [Get to Know the iPhone/iPad Mobile App](#)
- [Sign In or Out](#)
- [Set a Passcode](#)
- [Access Multiple Oracle Cloud Accounts](#)
- [Manage Notifications](#)

Manage Content

- [Work with Files and Folders](#)
- [View Files or File Details](#)
- [Edit Files](#)
- [Upload Files or Media](#)
- [Download Files or Media](#)
- [Search Content and Conversations](#)
- [Use Assets](#)

Collaborate with Others

- [Share Files and Folders](#)
- [Use Conversations](#)

Troubleshooting

- [Troubleshoot Mobile](#)

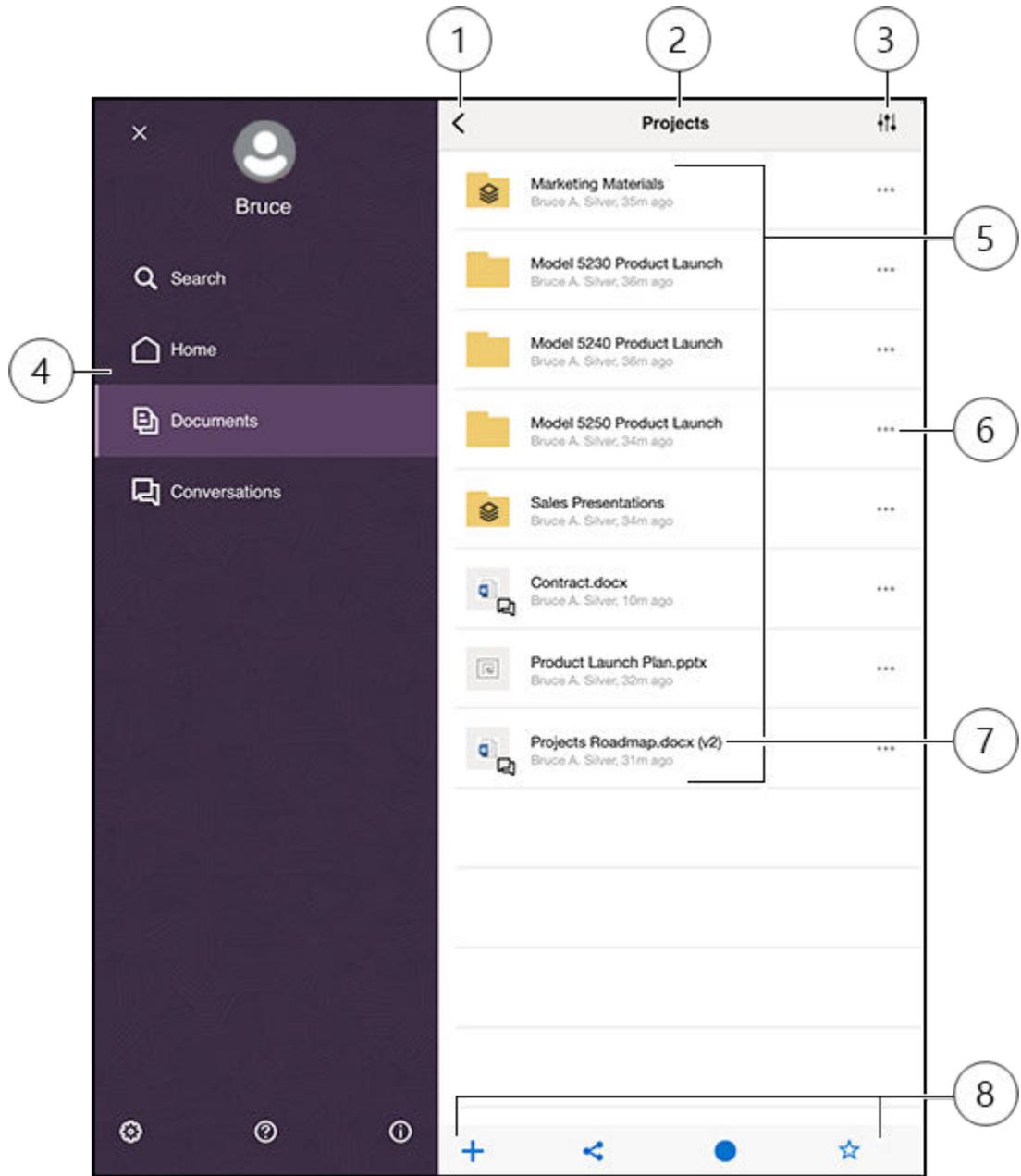
Get to Know the iPhone/iPad Mobile App

Oracle Content Management gives you collaboration and content sharing on the go with the iPhone/iPad mobile app. Take a minute to learn how and where to find what you need.

When you launch the mobile app, you first see your dashboard (home page), with personalized information and links to your favorite documents and conversations. Tap

 in the top left corner to see the navigation panel, from where you can go to your documents, conversations, or settings.

To help you find your way around, here's what the Documents page in the mobile app looks like on an iPad:



Item	Description
1	Tap the show/hide icon to open or close the navigation panel, where you can go to your home page (dashboard), documents, conversations, or settings, and also search for content.
2	The name of the current folder. If you are the top Documents level, you can filter your content, for example to show only folders that were shared with you or ones that you created yourself.
3	Tap this icon to change the sort order of your files and folders in the list.
4	Navigation panel, where you can go to your home page (dashboard), documents, conversations, or settings. You can also search for content or see help information. Tap the X in the top left corner or swipe to close the navigation panel.

Item	Description
5	A list of your files and folders in the cloud. The icons indicate what kind of content each item is (file or folder) and may also provide other helpful information. For example, the  overlay on a folder means that it's shared, while  means a conversation was started for a file. See Icon Quick Reference for an explanation of all icons.
6	Tap to show a menu of relevant tasks that you can perform for the item. For example, you may be able to view the item properties, edit tags, share an item, open an item with another app on your mobile device, or send it.
7	Version indicator of a file. Oracle Content Management keeps all versions of your files, but will only show the latest one. You can access older versions through the file properties.
8	Icons that allow you to perform a number of relevant tasks, such as add a new item to the cloud from your mobile device, create links to files, add members to the current folder, or add an item to your favorites. If you see three dots, you can tap them to see a menu of additional tasks that you can perform, such as view properties or copy, move, or rename the current item.

Sign In or Out

1. Tap the app icon on your device to open it.
2. Enter the URL of Oracle Content Management. You can find this in the welcome email that you received when you were added as a user to the service. You can also find it on the Download Apps page in the web application.
3. Enter your account information at the prompts. This information is also in the welcome email and on the Download Apps page.
4. Tap **Sign in**.

If you don't have an account, can't remember getting a welcome email, or forgot your login credentials, contact your service administrator in charge of managing your cloud accounts.

You're kept signed in on your device until you sign out or until your session expires.

To sign out, open the navigation panel, and tap , then tap **Sign Out**.

Set a Passcode

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

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

1. Open the navigation panel, and then tap  to access your settings.
2. In the Security section, tap **Passcode Lock** and then **Turn Passcode On**.
3. Enter the four digits to use as a passcode, then re-enter the digits to confirm.
4. Tap **Require Passcode** and choose the amount of time that has to pass before you need to enter the passcode.

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

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

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

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

Access Multiple Oracle Cloud Accounts

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

1. Open the navigation panel, and then tap  to access your settings.
2. Tap **Add New Account**.
3. Enter a name for the account. Tap **Next**.
4. Enter your user name and password, and then tap **Next**.
5. Tap **Connect**. You're now connected to the new account.

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

Manage Notifications

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

1. Open the navigation panel, and then tap  to access your settings.
2. Tap the account name that you want to customize.
3. Tap **Push Notifications**. You can elect to turn off all notification or choose specific ones you'd like to receive. For example, you may want to only be notified when someone assigns a Please Reply flag to you or when someone adds you to a conversation.

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

Work with Files and Folders

You work with files and folders in the Documents area. To view the Documents area, open the navigation panel, and then tap **Documents**.

You can also see your files in the Files app, in the Oracle Content location, but you can perform only those actions supported by the Files app. For example, you won't be able to upload a file while viewing the Oracle Content location in the Files app.

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

To upload a file, go to the location in the Documents area where you want add the file, tap , and then tap **Upload Media or Files**. Click one of the icons to select the type of file or media you want to upload, select your file, then tap **Done**.

When looking at your file and folder listing, you can perform the following actions by tapping , and then tapping the action:

Go to Conversation	Start or view a conversation about a file or folder.
View Properties	Open the folder or file property page. This is also where you can access the version history and review or create links to the item.
Share Link	Create a link to the file or folder.
Members	Add members to the folder.
Open In... (files only)	Open a file using an app on your device or save the file to your device.
Send (files only)	Send a copy of a file using an app on your device.
Edit Tags	Add a keyword or tag for an item, making it easy to find when you search.

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

 (files only)	Download a file for use offline.
	Open the file in another app (files only), send the file (files only), or share a link to the file or folder.
	View or edit the members and assigned roles for the file or folder.
	Mark or remove an item as a favorite. To see a list of your favorites, tap the drop-down menu next to the header on the Documents page and select Favorites .
	Shows additional options: <ul style="list-style-type: none"> • Delete: lets you delete a file or folder. • Go to Conversation: used to start a conversation about a file or folder. • Lock/Unlock Files: used to manage file access.

- **Copy:** used to copy a file or folder to a new location.
- **Move:** used to move a file or folder to a new location.
- **Rename:** used to rename a file or folder.

You can perform additional actions and manage multiple files or folders by long-tapping a file or folder and then selecting the files you want to manage. Use the options at the bottom of the screen:

	Mark or remove an item as a favorite. To see a list of your favorites, tap the drop-down menu next to the header on the Documents page and select Favorites .
	Copy files or folders.
	Move files or folders.
	Delete files or folders.
 (files only)	Lock or unlock a file.

Tips

Deleting items

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

Copying items

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

Locking files

- To lock a file, long press on the file name then select the file. Tap the lock icon at the bottom of the screen.

- Other people can unlock the file if they need to use it. If they do, you get an email telling you who unlocked it and when.
- If someone tries to upload a new version of a file you locked, they can unlock it and upload the new version. You'll be notified by email if that happens.

View Files or File Details

Tap a file or photo name to view the item. To view a video or listen to audio, tap the item name then use the controls to start, stop, or skip through the video. You can view video formats such as mp4, .m4v, .mov. The .mp3, .aac, .wav (for iPhone voice memos), and .mov audio formats are supported. Some .mov formats may not be viewable.

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

View details

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

1. Find the file or folder.
2. Tap , then **View Properties**.

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

When viewing an item's properties, you can perform many common tasks, such as downloading a file, sending or sharing the item, viewing members who share the item.

Tap  at the bottom of the Properties page to see the additional actions you can perform such as copying or renaming the item.

Edit Files

If you have an app on your device that can edit a particular file type, you can open the file from Oracle Content in that other app to edit it.

To edit a file from Oracle Content:

1. Open the file you want to edit.
2. It's a good idea to lock the file before you edit it. That way other people know the file is in use. In the toolbar at the bottom, tap , and then tap **Lock**.
3. Tap , tap **Open In...**, and select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.
4. Edit the file as needed.
5. Depending on the app you chose for editing the file, you may need to use a menu choice in the app such as **Open In...**, **Send a Copy**, or another file sharing option

such as a Files Location to send the file to Oracle Content. If you're offline, you can use one of those options after you're reconnected.

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

If you know you'll be offline soon (for example, if you're boarding a plane and using Airplane Mode), download the file to edit. Then you can work with it even if you're not connected to the Internet.

1. View the file you want to edit.
2. In the toolbar at the bottom, tap , tap **Save for Offline**.

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

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

1. In Word, tap **Open** and then tap **More**.
2. Tap **Browse**.
3. In the Locations dialog, turn on Oracle Content.

To edit a file using Microsoft Word:

1. In Word, tap **Open**.
2. Tap **More**, then **Locations**.
3. Choose the Oracle Content account you want to use from the list.
4. Find the file you want to edit.
5. After editing the file, tap **Save** to save it back to its original location or **Save As** to choose another location in Oracle Content.

Upload Files or Media

You can upload files or media to Oracle Content in several ways.

- [Upload Files in the Content App](#)
- [Upload Files from Your Phone or Other Apps](#)
- [Upload Files from One Oracle Content Account to Another](#)

Note:

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

Upload Files in the Content App

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

2. Tap .
3. Tap **Upload Media or Files**.
4. Choose what you want to upload:
 - Tap  to upload a photo or take a new photo and upload it.
 - Tap  to record a voice message and upload it.
 - Tap  to select a file from another location, such as Google Drive or from another Oracle Content account.
5. Select the item you want to upload. You can upload a maximum of 25 items at one time.
6. Edit the name of the item if needed, and enter an optional description.
7. Enter optional tags for the item. A tag is like a keyword, which helps you categorize files. If you upload multiple items, the same tags will be applied to all the files.
8. Tap **Add** or **Post** when done.

Upload Files from Your Phone or Other Apps

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

Upload Files from One Oracle Content Account to Another

You can upload files from one Oracle Content account to another. Say, you have two accounts: Corporate and SalesDept. You could sign in to your Corporate account, and select the option to upload a file. Then you could select Oracle Content as the location you want to choose from, select your SalesDept account, find the file you want to upload, and select a location in your Corporate account to store it.

Download Files or Media

When you download a file, you'll be able to use it even if you're not connected to the cloud. If you're traveling, for example, and have to set your device to Airplane Mode, you can still view or edit a file that's stored for offline use in the Content app or saved to your device.

There are two ways to download a file:

- [Save a File for Offline Use in the Content App](#)
- [Save the File to Locally Your Device](#)

Save a File for Offline Use in the Content App

1. Find the file and open it to view it.
2. Tap . Choose **Save for Offline**.

3. When prompted, choose to download the file.

Downloaded files are encrypted and stored in the Offline area of the app. To see a list of downloaded files, open the drop-down menu in the header on the Documents page, and tap **Offline**.

To remove a downloaded file, long-tap the file, select it, and then tap .

Save the File to Locally Your Device

1. Locate the file, tap , then tap **Open In...**

You can also save the file while viewing it by tapping , tapping **Open In...**

2. Tap **Save to Files**.
3. Select the location where you want to save the file, and then tap **Save**. If you want to be able to use the file when you're offline, make sure to save it locally to your device. When you save a file locally to your device, you can see it in the Files app.

Search Content and Conversations

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Type your search terms, and then tap Enter.

For example, if you search for the word "report", you'll find *Status Report 2019.xls* and *Report Logo.jpg*, as well as *Writing Instructions.doc* if the word `report` is in that document or conversation. You can filter your results by type (for example, by conversations or by files).

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

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- If you search for an item that has special characters in the name, the item isn't returned in the suggested search results for documents or folders.
- You can search for multiple terms by separating the terms with a comma or a space.
- To search for a phrase, use double quotes around the phrase. For example, "United States" returns files with the exact phrase `United States` in the file.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.

- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
 - `not` or the dash (-). For example, `Report2018,Report2019 -sales` returns `Report2018` or `Report2019`, but not items with the keyword `sales` in them.
 - `or` or a comma. For example, `Report2018 or Report2019` returns the same results as `Report2018,Report2019`.
 - `and` or a space. For example, `Report2018 and Report2019` returns the same results as `Report2018 Report2019`.

The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2018 and Report2019 not Report2019` returns nothing because `not` is evaluated first.

- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.
- The search is done on Favorite shared folders first and then other shared folders, up to 5000. If you have more than 5000 shared folders (either shared by you or with you), a global search may not return the expected results. If you think that's the case, you may want to designate some folders as Favorites before searching, to ensure better search results.
- If a file is larger than 10MB in size, it won't be included in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Use Assets

Assets are those items you want to group together for use on a website or for other projects.

The following is a brief overview of how you can use assets on your mobile device.

Work with Assets

You can review an asset to either approve, reject, or comment on it using your mobile device. Asset approval might just change status, or, if your service and content administrators have configured Oracle Content Management to use additional workflow options, approval might be part of a workflow that changes status automatically.

Approve and Reject Assets

In the Home view, you see items that require simple asset approval in the **Approvals** tile, and you see items that require workflow approval in the **Workflow Tasks** tile. Tap the tile to view the items.

Approvals

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

When you're ready, tap  to approve the asset. Tap  to reject the asset.

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

Workflow Tasks

In the list of assets waiting approval, you see the due date (if there is one), a preview of the asset, details about the asset, and your workflow task.

To act on the workflow task, tap the workflow task name or . Select an action, optionally add a comment, and then tap **Submit**.

You can also take action on an item while viewing it by tapping  at the bottom of the screen.

To learn more about workflow, see Use Workflows in *Managing Assets with Oracle Content Management*.

Comment on Assets in Review

To post a comment when reviewing an asset, view the asset and tap  to see the annotation tools. When the tool bar is displayed, tap  in the tool bar then tap the asset to place an annotation in a specific location of a specific page. This opens the asset's conversation where you can post your comment.

Tap the  in the toolbar then tap-and-drag to select an area of the asset to highlight and annotate.

Tap the  in the toolbar and select a person to show posts by that person.

Once an annotation has been placed on an asset, tap  to highlight the post associated with the annotation. You can also tap a post in the conversation to see the annotation associated with the post.

Share Files and Folders

You can share individual files or entire folders directly from your mobile device.

You can share files and folders in the cloud directly from your mobile app by creating links to them. Then share those links with other people to give them access to your content. You control what other people can do with your shared files or folders: just view the item online, download the item, or modify the item. You can also set a link expiration date or access code. After creating a link, you can share it however you want to, for example by adding it to an email or send it in a text message.

You also share folders by adding members to them, which gives those people access to all the content in the folder and its subfolders. This is useful when you're working on a large project, for example, and people may need to continually access information.

See [Share Files and Folders](#) for more details.

Use Conversations

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

To create or view a conversation about a specific file or folder:

1. Find the file or folder you want to use for a conversation.
2. Tap .
3. Tap Go to **Conversation**. If a conversation doesn't already exist, one will be started for you.

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

1. Open the navigation panel, and then tap **Conversations**.
2. Tap . A new, empty conversation is started for you.
3. Add the conversation name.
4. Tap **Create**.

To add members to conversations:

1. Open the conversation, and, then in the members bar, tap .
2. Tap .
3. Start typing the name of the person to add. A list of names matching the letters you entered is shown. Select the people from the list, then tap **Add**.

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

To add a post to the conversation, open the conversation, type your message in the message field, and then tap **Post**.

8

Share Files and Folders

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

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



Sharing Overview

[Take a quick tour of sharing](#) (English only).

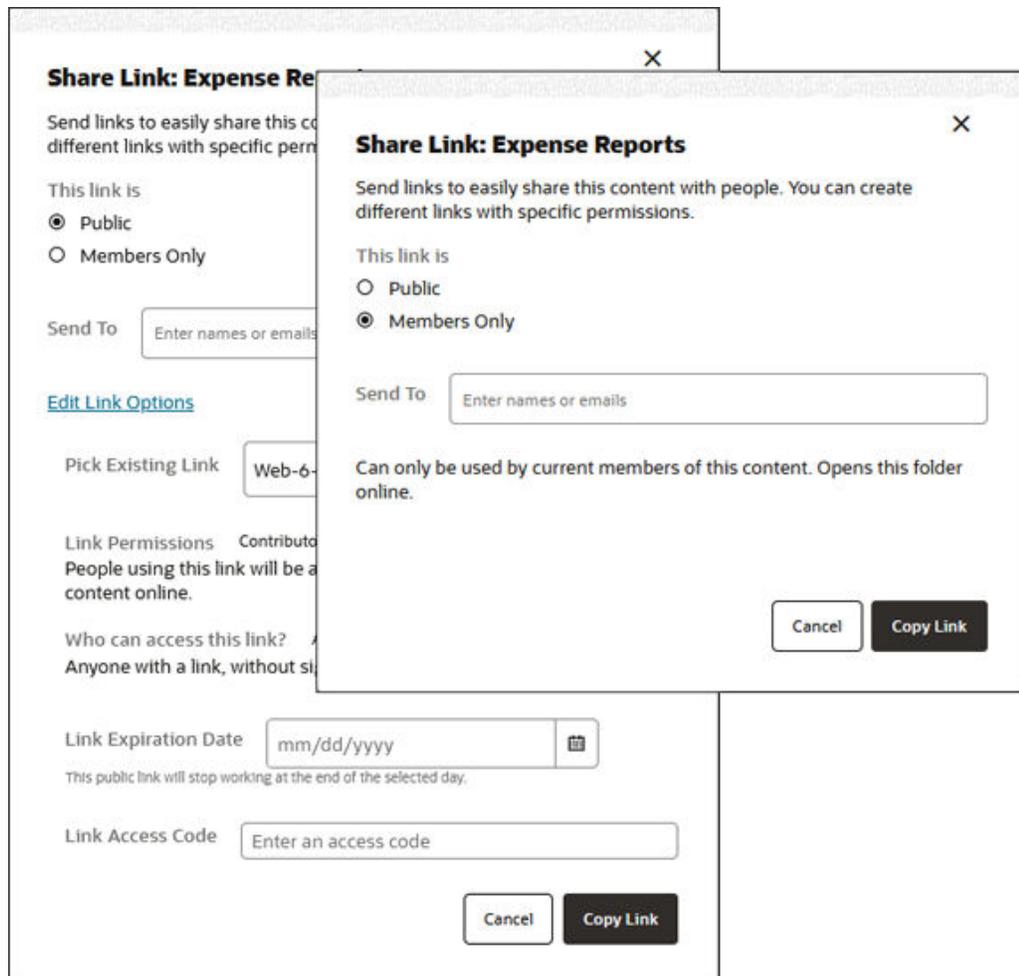
You may need to collaborate with other people and share information, but you want to make sure only the right people have access to that information. The type of sharing you use depends on what you need to share:

- **Files:** You can create a link and email the link to someone or use it in an instant message or a document or another app. Sending a link is useful if you need to give access to people on an as-needed basis to specific files. The only way the recipient can access the file is by using the link. There are public links and members-only link, which limit who can access the shared content.
- **Folders:** You can send a link to a folder or you can add people or groups as members to the folder. When you add members to a folder, those people and groups can access all the content in the folder (including subfolders). This is useful when you're working on a large project, for example, and people may need continuous access to ever-changing information.

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

If you have access to more than 100 folders (either owned by you or shared with you), your search results will only include items from the first 100 folders.

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



Roles

You decide what people can do with your shared content by assigning them roles, which have specific permissions for accessing the shared content. When adding members to folders, you determine their role in that folder. You may allow documents to only be viewed or you may decide people should be able to edit them and upload new versions. The following roles can be used:

- **Viewer:** Viewers can look at files and folders, but can't change things.
- **Downloader:** Downloaders can also download files and save them to their own computer.
- **Contributor:** Contributors can also modify files, update files, upload new files, and delete files.
- **Manager:** Managers have all the privileges of the other roles and can add or remove other people as members.

The **owner** of a folder, who is the person who originally created the folder, has the broadest permissions to manage a folder, including deleting and moving the folder.

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

 **Note:**

If your system administrator has enabled Microsoft Office Online integration, viewers can only see the preview of the file in the web client, downloaders can also view the file in Microsoft Office Online, and contributors and managers can also edit the file in Microsoft Office Online.

Shared Folder Permissions

The role you assign an added member when you share a folder determines the tasks they are able to do. This helps you provide the permissions necessary for every member while keeping your content secure.

In some situations, there are limitations based on the task. For example, a person can have the manager role to a folder and be able to move subfolders and content to other subfolders. But if the folder they're moving content to doesn't have the same owner as the folder the content came from, they won't be allowed to complete the move. This prevents someone from having their content moved to a folder they may not have access to.

Task	Owner	Manager	Contributor	Downloader	Viewer
View View files in a shared folder.					
Download Download files in a shared folder.					
Create members-only links Create members-only links to shared folder or content in shared folder.					
Create public links Create public links to shared folder or content in shared folder.					
Copy Copy top-level shared folder or content in shared folder. * If you are not the folder owner, copies must be made to a folder where you have the Contributor or Manager roll (write permissions).		*	*	*	
Move folder Move top-level shared folder.					
Move subfolders or files Move subfolders or files in shared folder. ** Moves must be made to a target folder with the same owner as the original shared folder.					
Delete folder Delete top-level shared folder.					
Delete subfolders Delete subfolders in shared folder.					
Delete files Delete files in shared folder.					

Task	Owner	Manager	Contributor	Downloader	Viewer
Manage members Manage members for shared folder.					

Public vs. Members-Only Links

Sharing a link to a folder or file is a way of controlling that person's access to documents in Oracle Content Management. Public links can be sent to anyone in your organization without explicitly adding individuals to a folder's membership. You can set limits to what, when, and how content can be accessed, and expire access automatically or manually. They're quick and easy, and provide access to a specific file or folder, and no others, providing a tunnel into a folder or file, isolating it from a larger context users may not have access to.

Your service administrator can disable the use of public links and can set who can access those links (anyone or only registered users).

Note:

Public links aren't supported in private instances.

Member Only links can be used only by members of a folder. What, when, and how content can be accessed is dependent on the role assigned to a member. Roles are assigned by either an owner or manager of a folder and allow different levels of access. Each member is added individually or as part of a group, and have access to all content in the folder.

Public Links

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

When creating a public link, if your administrator has allowed it, you can choose to send the link to **Anyone**, which means you can send it to people who don't have an Oracle Content Management account, or you can limit the recipients to **All Registered Users**, those people who have an account.

When collaborating with partners and outside vendors, you can provide secure public links to files so everyone has the right level of access. Setting an access code and optional expiration date on links adds additional security, and you can maintain oversight by monitoring who accessed which shared files and when.

Access codes are like passwords for a public link. You can set an access code and the person who gets the link will need to enter the code before the link can be used. You'll need to send the access code to the person receiving the link so they can use the link. Otherwise, they will be unable to access the content associated with the link.

Members-Only Links

If you create a members-only link to a file or folder, any person you share this link with must sign in to their Oracle Content Management account in order to access the shared content. When you use a member link, you can choose **Online Access**, which lets the recipient view the file or folder. You can also use a **Direct Download** link when sharing a file. This lets the recipient download a file without viewing it.

You can [add external users](#) who may not be a part of your organization to a folder, provided your service is configured to allow external users. External users can collaborate on objects to which they're given access, but they cannot be assigned the manager role. If they are a member of a group that is assigned a manager role, they will have only contributor rights. This safely limits their ability to create and remove content.

Share Files

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

Create Links

- **Browser:**

1. Select the file and choose **Share Link** in the right-click menu or click  in the actions bar.
2. Choose the type of link (member or public). You can't create member links for files in the root folder.
Note: If you create a member link, access to the file is based on the user's role on the folder. If you create a public link, access to the file is based on the role set as the system-wide default set by your administrator or by the setting on the parent folder. The role is shown at the bottom of the dialog. To change the role, click **Edit Link Options**, and select a new role.
3. If you want to email the link to people, enter the users' names or email addresses.
4. Link options, such as the type of access to this folder, and, for public links, expiration, are shown at the bottom of the dialog. To change these options, click **Edit Link Options**.
 - For member links, you can select whether the file opens online or downloads to the user's computer. If you select open online, the user's access is based on their role on the parent folder.
 - For public links, you can select a previously created public link, change the permission, select whether anyone can access the file or only registered users, set an expiration date, and set an access code to limit access to the link.

You can copy the link and use it elsewhere or enter an email address to send the link directly to someone with an optional note about the link.

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

link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy the link you create and use it elsewhere.

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

See [Sharing Overview](#) for details about Member and Public links.

Configure Access to Links

To configure access to folder links, access the Properties for the folder in either the desktop app or your browser. Then click **Sharing** and adjust the values as needed:

- To prohibit public links for an individual folder and its items, disable the public links option.
- To change the role that's automatically assigned to people when public links are created, select a new role from the drop-down list. For example, maybe you chose the default role of Viewer for most of your folders, but for one folder, you'd like a default role of Downloader. This helps you customize link behavior for specific folders.

Share Folders

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

Your administrator can configure public link settings, determining if you're allowed to create public links, the default and maximum permissions for links, and whether links need to expire. If you don't see some of the options described below, contact your administrator.

Create Folder Links

You can only share folder links with individuals, not groups.

- **Browser:**
 1. Select the folder and click or **Share Link** in the right-click menu or  in the actions bar.
 2. Choose the type of link (member or public).
Note: If you create a member link, access to the folder and its items is based on the user's role on the folder. If you create a public link, access to the folder and its items is based on the role set as the system-wide default set by your administrator or by the setting on the parent folder. The role is shown at the bottom of the dialog. To change the role, click **Edit Link Options**, and select a new role.
 3. If you want to email the link to people, enter the users' names or email addresses.

4. Link options, such as the type of access to this folder, and, for public links, expiration, are shown at the bottom of the dialog. If you're creating a public link, you can change these options by clicking **Edit Link Options**. You can select a previously created public link, change the permission, set an expiration date, and set an access code to limit access to the link.
If you're creating a member link, you change the type of access a user has by changing member roles on the folder.
- **Desktop app:** select the folder in your Oracle Content folder and right-click. You can use the **Copy Link** option from the Oracle Content context section to quickly create a default public link and have it copied to your clipboard for use where you need it. Or you can choose **Share Link**. A dialog opens where you can elect to create a Member link or a Public link or open your email program to send the link in an email message. When creating a public link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy any link you create and use it elsewhere.
 - **Mobile device:** Tap  (Android) or  (iOS). Tap **Share Link**. Tap **Pick Existing Link** to see available links and Member links. To create a new link, enter the necessary details. When done, click **Create** and select the app to use to share the link.

Choose the kind of link you want to use.

Configure Access to Links

To configure access to links for the folder and its contents, access the Properties for the folder in either the desktop app or your browser. Then click **Sharing** and adjust the values as needed:

- To prohibit public links for this folder and its items, disable the public links option.
- To change the role that's automatically assigned to people when public links are created, select a new role from the drop-down list. For example, maybe you chose the default role of Viewer for most of your folders, but for one folder, you'd like a default role of Downloader. This helps you customize link behavior for specific folders.

Add Folder Members

- Browser: select the folder and choose **Sidebar** in the actions bar and select **Members**. Click **Add Members**.
- Desktop app: select the folder in your Oracle Content folder, right-click, and choose **Members** from the Oracle Content context section.
- Mobile device: tap  (Android) or  (iOS). Tap **Members** or .

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

Add External Users

You can add external users who may not be a part of your organization to a folder, provided your service is configured to allow external users.

1. Use your browser to add members to a folder.

2. Enter the complete email address of the external user you are adding. Their full email address must be used each time you add them as a member. If there isn't already a user with that email address, Oracle Content Management will automatically provision a new external user.
3. Add any additional information, if requested, such as their name and location.

Once an external user has been invited and successfully provisioned, you can add them to other folders, or even to conversations, just as you would internal users.

External users can collaborate on objects to which they're given access, but they cannot be assigned the manager role. If they are a member of a group that is assigned a manager role, they will have only contributor rights. This safely limits their ability to create and remove content.

Stop Sharing

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

- In your browser choose **Members** in the right-click menu or select **Sidebar** in the actions bar and choose **Members**.
- When using the desktop app, go to your Oracle Content folder. Right click on the folder you want to use and choose **Members**.
- On your iPad or iPhone, tap . Tap **Members**.
- On your Android device, tap . Tap **Members**.

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

To stop sharing an entire folder:

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

Check File Access History

To check the access history of a file choose **Properties** from the right-click menu or select **Sidebar** on the actions bar and choose **Properties**. When viewing a file, click  and then click **Properties**. Click the **Access History** tab to see all activity for that file.

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

Recover a Deleted File in a Shared Folder

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

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

Sharing Tips

- If you share a folder, the sharing role applies to subfolders, too, unless you change those rights specifically.
- Your service administrator can allow or prevent the use of public links for your service and set who can receive those links (anyone or only registered users).
- When someone shares a folder with you, you're assigned a role. You may not be able to do some things, like uploading or deleting, because your role may not allow it. If you can't do something, then that menu option isn't available. For example, if you have a Viewer role in a folder, the **Download** option isn't available when using a web browser and the folder isn't available for syncing when using the sync client. To check your role, view the list of members in a folder. Your role is listed next to your name.
- You don't have to share a parent folder to share subfolders. For example, you can have a parent folder called *Current Projects*, and in that folder you can have subfolders called *Discount Program*, *Monthly Newsletter*, and so on. You can share *Discount Program* or *Monthly Newsletter* with people without sharing the *Current Projects* folder.
- The same person can have a different role for each subfolder in an unshared parent folder. For example, you can share *Discount Program* with Leo and assign him the Contributor role for that folder. You can share *Monthly Newsletter* with Leo and assign him the Viewer role for the files in that folder.
- If you share a parent folder that you own, then you can increase rights for the subfolders, but you can't decrease the rights. This means:
 - if the role assigned at the parent folder level is higher than the role assigned at the subfolder level, then the highest role is used for all subfolders.
 - if the role assigned at the parent level is lower than the one assigned at the subfolder, then the subfolder role doesn't change.
- If you have access to more than 100 folders (either owned by you or shared with you), your search results will be incomplete, as searches are limited to 100 folders.

9

Use Conversations

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

- [Take a quick tour of conversations](#) (English only)
- [Conversations Overview](#)
- [Get to Know the Conversations Page](#)
- [Filter or Sort Conversations](#)
- [Start a Conversation](#)
- [Add or Remove People in a Conversation](#)
- [Add or Remove Files in a Conversation](#)
- [Manage Your Conversations](#)
- [Add Annotations](#)
- [Add Links to Another Conversation](#)
- [Use Flags](#)



Video

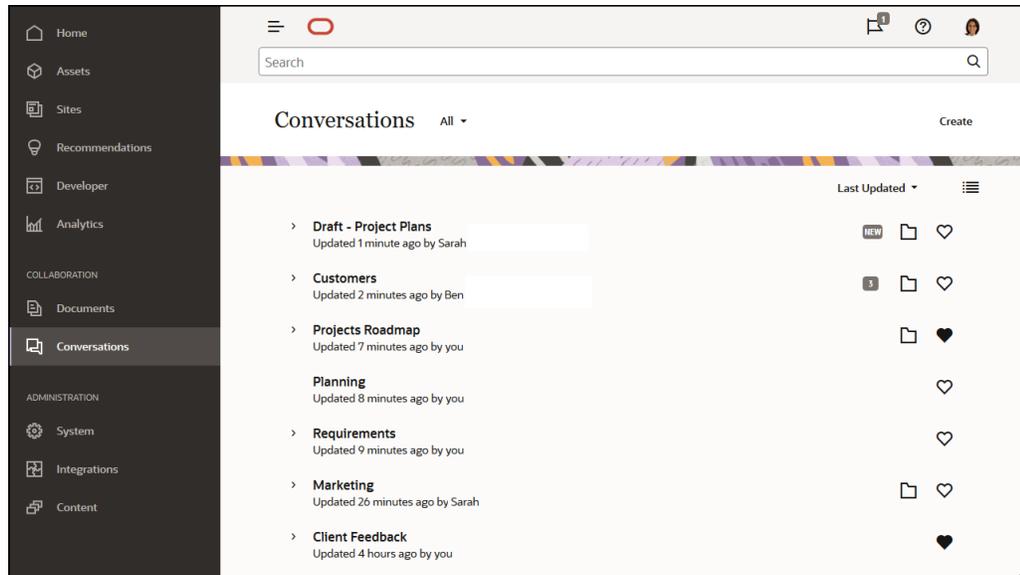
Conversations Overview

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

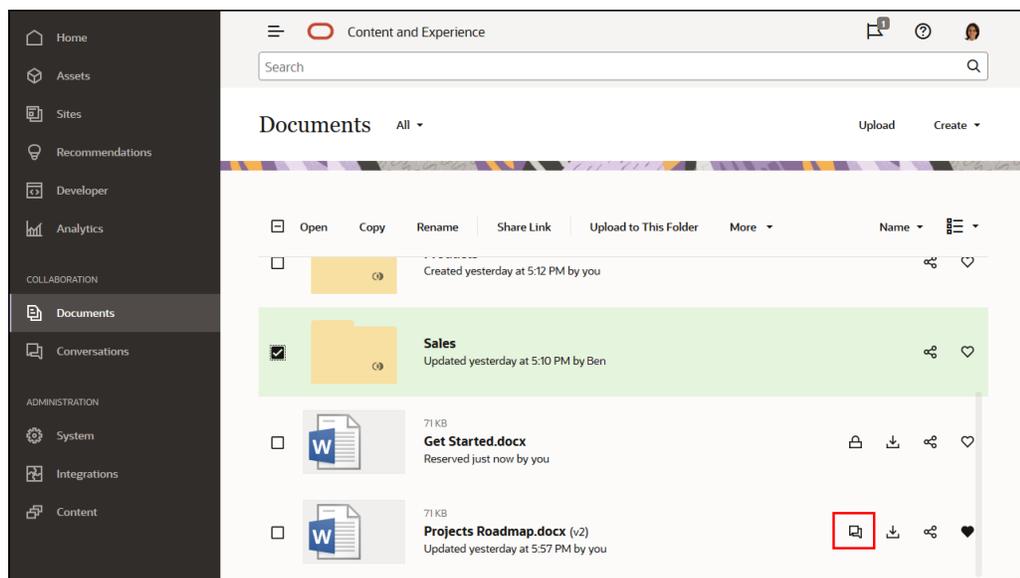
You can create a conversation to discuss a specific document, folder, asset, collection, or site; or you can create a stand-alone conversation to discuss any topic you want. Conversation members can add, reply to, and like comments; [add attachments](#); [make annotations](#) on associated documents and sites; and [add flags](#) to bring people's attention to an item or comment.

You can also use hashtags (#) to add keywords to your conversations. A hashtag in a message designates a meaningful term or topic so it's easy to group all content associated with that term or topic.

You can see all conversations to which you have access on the [Conversations page](#). From here you can quickly create a new stand-alone conversation, view an existing conversation, see how many unread messages are in the conversation, or reply to or like the most recent message in a conversation.



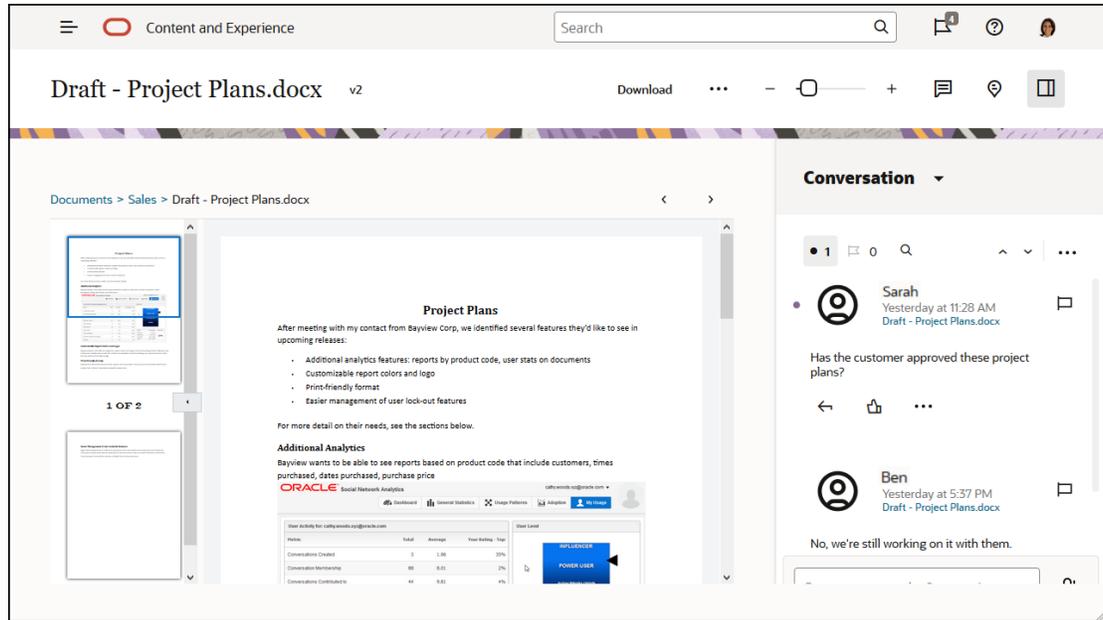
When you're viewing a list of objects, you can easily see whether an object has a conversation associated with it because it has a conversation icon next to it.



When you're viewing an object, you can start or participate in a conversation about the object by clicking  to open the sidebar.

 **Note:**

If you've previously viewed other information, such as metadata, API information, or translations, you might need to switch back to the conversation by selecting the option in the pane's drop-down menu.



Conversation Membership

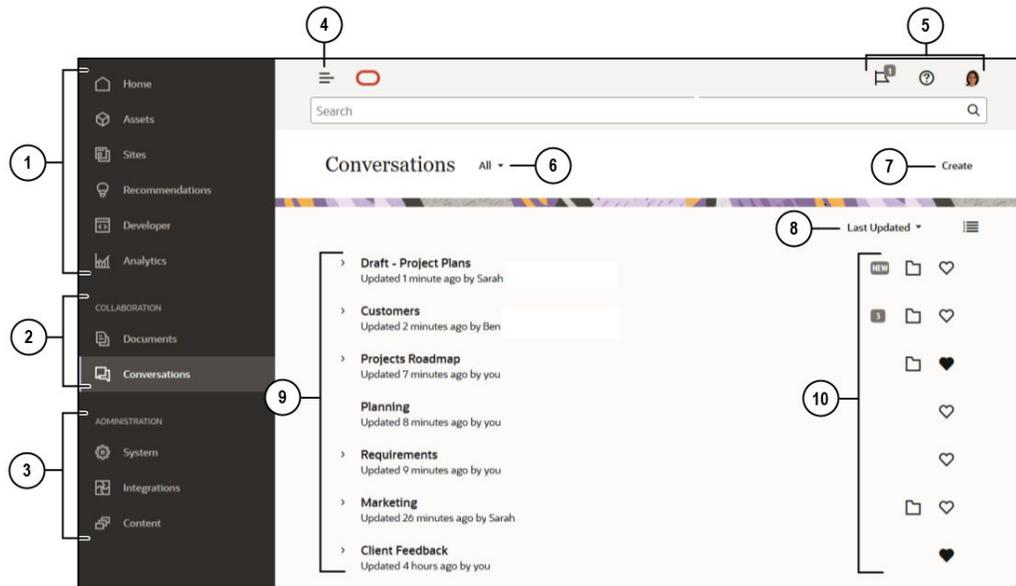
When a conversation is associated with a file, folder, site, asset, or collection, members of the item can post comments that are visible to all the members. This means an entire team can view and comment about the item. Anyone you add as a member can view a conversation and add posts to the conversation.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

When you create a stand-alone conversation, you must [add members to the conversation](#). They can post comments in the conversation and reply to comments from other members. They can also add documents to share with other people in the conversation.

Get to Know the Conversations Page

Oracle Content Management gives you the ability to collaborate through conversations. Take a minute to learn how and where to find what you need.

Here's what you see on your Conversations page when you get started:



Item	Description
1	The navigation panel is where you can switch between features. The options you see on this panel depend on the user role you've been given. For example, only enterprise users will see options for Assets . Click Home to display a page that includes links to recent items, documentation, guided tours, and other helpful links.
2	The collaboration section provides access to your documents and conversations.
3	If you have administrative privileges, you'll see options that let you set up system-wide options; integrate Oracle Content Management with other services; and configure repositories, localization policies, and other features related to digital asset management.
4	Click the show/hide icon to open or close the navigation panel.
5	The user area is where you can change your preferences or find the desktop and mobile apps. Click your user picture to change your defaults. If you have notifications from conversations, the flag will show the number of notifications.
6	Filter what you see to view only your favorites, any conversations you've muted, or only closed conversations.
7	Create a new conversation not associated with a document.
8	Sort your conversations list by when it was last updated, name, or by number of unread messages. Click the view icon to display items in a compact view or an expanded view.
9	Your conversations list shows the name of the conversation, when it was last updated, and who updated it last. Click  next to a conversation to view the most recent message in the conversation.
10	The messages icon () shows that the conversation is new (meaning you haven't looked at it before) or the number of unread messages in the conversation. The folder icon () shows that this conversation is associated with an item, either a folder or a document. Click the folder icon to open the associated item. Click the favorite icon () to mark something as a favorite.

Filter or Sort Conversations

In your web browser

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

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

On a Mobile Device

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

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

Start a Conversation

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

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

1. Open the item you want to use.
2. Click .
3. Start the conversation by posting a message in the conversation pane.

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

To start an independent conversation to collaborate with others:

1. Click **Conversations** in the navigation sidebar.
2. Click **Create** and enter the conversation name.

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

Add or Remove People in a Conversation

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

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

You can even add [external users](#) who may not be part of your organization to a folder or conversation, provided your service administrator allows it and their email address is registered with your service. They cannot rename or close the conversation, or add other members.

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

- A full green circle around the picture shows that the person is signed in and currently using their account.
- A three-quarter yellow circle around the picture shows that the person is signed in but not currently using their account.
- A half gray circle around the person's picture shows that the person is offline and not signed in.

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

Web Browser

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

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

A quick way to remove a person from a conversation (including yourself) is to click the person's picture in the membership bar, then select **Remove from Conversation**. You

can also click  and click **Remove** under the name of the person you want to remove.

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

iPhone/iPad

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

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

Android devices

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

Add or Remove Files in a Conversation

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

In a web browser

1. Open the conversation where you want to add a file.
2. Click .
3. Select where the file is stored, either on your computer or already stored in Oracle Content Management. Navigate to the file, select it, then click **Post**.
4. You can add a message with the file, or just click **Post** to add the file by itself.

On your iPhone or iPad

1. Open the conversation on your iPhone or iPad.
2. Tap .
3. Tap **Choose from Folder** to add a file from your Oracle Content account. Tap **Upload Media or Files** to:
 - Choose a photo or video from items stored on your device.
 - Record a voice message to add to the conversation.
 - Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in Oracle Content.
4. Tap **Edit** to change the name or add an optional description.
5. Tap **Post**.

On your Android device

1. Open the conversation where you'll add the document.
2. Tap .
3. Choose what you'll add to the conversation.
 - Choose a photo or video from ones on your device.
 - Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in your account.
 - Choose a file already in Oracle Content. Navigate to the location where the file is stored and select the file.
4. Choose the location in Oracle Content where you want to store the item.
5. Tap  and then tap **Edit** to change the name or add an optional description.
6. Tap **Done**.

Manage Your Conversations

When viewing a conversation, you can manage your conversation by clicking **⋮**. If you're viewing a conversation associated with an item, click **⋮** in the Conversation pane. If you're viewing an independent conversation, click **⋮** in the Conversation toolbar.

- **Mark All Read:** (shows when you have unread messages) You can mark all the posts in the conversation as read. The “read” count appears in the conversation listing.
- **Add to Favorites:** Add the conversation or remove it from your list of favorites.
- **Share Conversation:** Share the conversation by adding members to it or by sending a link to the conversation.
- **Upload Document:** Add a document to the conversation.
- **Rename Conversation:** Change the name of the conversation.
- **Mute Conversation or Unmute Conversation:** Muting a conversation hides it from your list of conversations and stops messages about it from appearing in your email digest if you chose to have one sent to you.
- **Close Conversation or Open Conversation:** Closing a conversation prevents people from adding new messages to it and removes it from people's list of conversations.
- **Discard Conversation:** (shows only if you are the only member of the conversation) You can discard a conversation that was created independently of a file or folder. When you discard it, the conversation is removed from the listing of conversations for yourself and any members.
- **Show Membership Messages or Hide Membership Messages:** (shows only in independent conversations) These types of messages show when a person was added to a conversation and who added them.
- **Set Conversation Language:** You can adjust the language setting for individual conversations by choosing a language from the list.

Add Annotations

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

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

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

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

1. View the file where you want to add a comment.
2. Click  .
 - To highlight text and leave a comment about the highlighted area, hold down the right-button and drag your cursor to select an area. Release the button and add your comment in the Conversation pane.
 - To insert a comment at a spot in the file, go to the area where you want to add a comment. Click at the spot then add your comment in the Conversation pane.
3. Click **Post** to save your annotation.

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

To view annotations, click  .

Add Links to Another Conversation

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

1. Open the conversation where you'll post your message. It can be an independent conversation or one created for a document or folder.
2. Enter your text in the message box. When using a browser, formatting options are available under the text box.
3. Click or tap  .
4. Search for a conversation or choose one from the Recent list. A link to that conversation is added to the body of your message.
5. Click **Post** or press Enter, depending on how you set up your preferences.

Use Flags

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

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

Flag	Meaning
	For Your Information: look at this when you have time, or Please Reply: look at this, and let me know what you think.
	Please Reply Urgent: look at this as soon as you can and let me know what you think.

 **Note:**

By default, you will not be sent an email if flagged in a conversation, even if the flag is requesting a response or set to urgent. To receive and email notification, your [preferences must be set](#) to do so.

You can see your total flag count in the header (). Click the flag count icon to quickly see the flags assigned to you and any flags you've assigned to others.

On the Flags page you can filter the flags to show flags assigned to you or flags you've assigned to others, and you can filter by flag type. You can sort flags by flag date or message date.

You can perform the following actions from the Flags page:

- To view the message in the conversation, click the message.
- To reply to the message, click .
- To like the message, click .
- To clear a flag, click the flag icon. Click **Clear** or tap the **X**. The person who set the flag may get an email, depending on what they've set up through their notifications.

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

10

Use Groups

You can set up groups of people, making it easy to share with several people at one time.

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

Groups Overview

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

[Take a quick tour about groups](#) (English only).

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

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

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

- **Don't duplicate groups.** Use the **Find Public Groups** option on the Group menu to see if a group already exists that might be useful for your purpose.
- **Use a meaningful name.** Don't use acronyms or abbreviations for your group name. Make it meaningful so people will understand its purpose.
- **Choose the right privacy control for your group.** You can control who can find and use the group and if people can add themselves to the group. You can create the following types of groups:
 - *Public group*—A public group is visible to anyone, and people can add themselves to the group. You should use this kind of group sparingly. For example, you might have a rollout of a project and you'd like to gather feedback from anyone who used the project. You can open up a group to everyone and let people add themselves so they can add feedback about that specific project.
 - *Private group*—A private group is one that can be seen by anyone, but people can't add themselves to the group. This can be useful when you want to limit a group to a subset of people. People could discover the group exists and use the group to share information with those people. For example, you can create a group for the Engineering department. Anyone who needs to collaborate or share with that department can add that group as a member to a conversation or folder.

- *Closed group*—This type of group gives you the tightest control on membership. No one will be able to see the group unless they're already a member, and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming acquisition or project. No one else in the organization needs to know about this, so by creating a group for restricted members, you control who can see the information.
- You can add a group as a member to any item. If you add someone to a group or remove someone from a group, they will be added or removed from the item. If an individual was added as an individual but not as part of a group, they remain a member unless removed as an individual.
- If you add a group as a member of an item that requires a specific user [role](#), only users with that role will be able to access the item. For example, if you add a user with the Standard User role to a group, and then add that group as a member of a repository, the standard user won't have access to the repository because you must have the Enterprise User role to access repositories.
- If a group is deleted, access to any shared folder, content type or conversation is removed from the people in that group.
- You can use groups on your mobile device and with the desktop app, but you manage groups using the web browser interface.

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

Create or Delete a Group

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

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

Create a Group

1. Click your user picture to open the user menu and then click **Groups**. Choose **Find Public Groups** from the menu at the top of the Group page. If you don't find a group you can use, select **Create Group**.
2. Create a meaningful name for the group. Don't use abbreviations or acronyms that might be confusing. Use a name that will tell people the purpose of your group.
3. Choose the privacy settings you want to use.
 - Select who can find the group. If you select **Anyone**, then users will be able to see the group in the list of public groups. If you select **Members**, only users who are already members will know this group exists.
 - If you selected that anyone can find the group, you can select whether users can add themselves to the group.

For examples of how to use these settings to create the right type of group for your situation, see [Groups Overview](#).

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

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

Delete a Group

To delete a group, click **⋮** next to the group name or in the group's toolbar, and select **Delete**.

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

Add People to a Group

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

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

To add someone to a group, click **Groups** in your user menu. Open the group or click **⋮** next to the group name, then click **Add Members**.

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

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

You can even add external users who are not part of your organization to a group, provided your service administrator allows it and their email address is registered with your service. External users can only be added to private groups, not public groups, and cannot be given manager permissions to a group. Any group they are a member of can be added to a folder as a manager, but the external user permissions will only be that of a contributor.

Join or Leave a Group

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

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

Join a Group

To join a group, click **Groups** in your user menu. Choose **Find Public Groups** from the menu at the top of the Group page. Choose the group you want to join and click **...** next to the group name. If the membership is open, you can select **Join Group**.

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

Leave a Group

To leave a group, open the group and click **...** in the group's toolbar. Select **Leave Group**. If a conversation, folder, or content item was shared with that group, you'll lose access to those things immediately.

11

Troubleshoot

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

General

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

Sync

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

Microsoft Office Add-On

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

Sharing

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

Mobile

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

Troubleshoot Web Browser

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

- I can't sign in
- I can't move or copy a file
- I don't see digital assets or content items
- I can't upload or download a file
- I can't find my downloaded files
- I can't create a folder
- I exceeded my storage quota but I didn't think I had that many files
- I need to edit a file but it's locked by someone else
- I'm having trouble loading the software
- I'm having trouble viewing a file or video

- [There are multiple version numbers after a file name but I only uploaded one version](#)
- [I don't see the folders that I expected to see in my folder list](#)
- [URLs copied from a spreadsheet don't paste correctly](#)
- [I don't see the results I expected when searching](#)

I can't sign in

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

Note the following when logging in:

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

If you need help resetting your password, see [Managing Your Password](#) for details.

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

I can't move or copy a file

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

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

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

I don't see digital assets or content items

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

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

I can't upload or download a file

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

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

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

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

I can't find my downloaded files

When you download a file, it goes to the download location configured for your web browser or you may be able to choose the location to download the file to, depending on your web browser settings.

To remove a downloaded file, long-tap the file, select it, and then click DELETE. Removing these files from your computer won't affect the original copy stored in the cloud.

I can't create a folder

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

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

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

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

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

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

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

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

I can't edit an Office 365 file online

In some situations when you try to edit a file in Microsoft 365, the page continually refreshes and doesn't load the file for editing. To resolve this, open your browser privacy settings and make sure to allow cross-site tracking.

I'm having trouble loading the software

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

I'm having trouble viewing a file or video

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

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

File previews are limited to the first 300 pages. The entire file size must be less than 150MB.

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

- Chrome: MP4, WebM, and Ogg
- Firefox: MP4, WebM, and Ogg
- Safari: MP4

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

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

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

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

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

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

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

If you have access to more than 100 folders (either owned by you or shared with you), your search results will be incomplete, as searches are limited to 100 folders.

URLs copied from a spreadsheet don't paste correctly

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

1. Highlight the cell containing the hyperlink.
2. Open the hyperlink dialog box.
3. Highlight the entire URL and copy it.
4. Close the hyperlink dialog box.
5. Paste the URL to the desired location.

I don't see the results I expected when searching

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

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

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will not be returned in search results for a few seconds.
- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.
- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Troubleshoot the Desktop App and Sync

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

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

I can't sign in to the desktop app

If you're having trouble signing in to the desktop app, here are some things to try:

- Make sure you're using the correct server URL. You can see the server URL on the **Download Apps** page (accessed from your user menu).
- Make sure you're using the correct user name and password. You can see your user name on the **Download Apps** page (accessed from your user menu). If you've forgotten your password, contact your system administrator.
- If you're using Mac OSX Mojave, sign-in might be failing due to updated security used by Safari embedded in OSX Mojave. This issue might be fixed if you apply the latest OSX Mojave security updates. If applying the updates doesn't work or you'd prefer a guaranteed fix, upgrade the OS from Mojave to Catalina.

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

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

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

PDF files created in a synced folder disappear

If you try to use **Microsoft Print to PDF** to create a PDF in a synced folder, the operation won't complete correctly and the file disappears. Instead use **Export to PDF** or **PrimoPDF**.

Alternatively, you can create the PDF in another folder, and then move it to the synced folder; or pause syncing while you create the PDF, and then restart syncing after it's done.

Links in my synced files aren't working

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

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

I have sync problems or slow syncing

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

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

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

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

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

You might get a system error, which is usually a problem with your cloud connection.

To see the error, click . An error dialog is shown and there may be a **View Details** link, where you can find out more about the problem.

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

If your sync process is running slowly, your desktop app can be optimized for better performance. Over time, the database that tracks your synced files grows slowly and

can reduce productivity. From the  menu, click **Help** and then **Troubleshoot**. Click **Optimize** to clear out old data.

File Conflicts

Conflicts happen when a file is changed on more than one computer at the same time. The first version of the file to be saved or uploaded to the cloud is considered the new authentic file, and that file is then synced across all computers and the cloud. One exception to this is if the only change is the file's name. In that case, the new name is applied to the authentic file, and it's synced.

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

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

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

Items Not Syncing

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

- Hidden files, like system files
- Temporary files (beginning with a tilde (~) or with a .tmp extension)
- Windows shortcuts
- Symbolic links (symlinks)
- Hidden folders
- Encrypted folders on Mac computers
- A file with a name containing any of these characters: | \ / ? " : < > *
- Files known to contain viruses. If a local virus scanner isn't enabled, an infected file is transferred from the Oracle Content folder to the cloud during sync. There it's scanned for viruses and moved to the Trash folder.

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

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

I can't change an Oracle Content account folder location

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

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

In some situations, the sync status overlays may disappear in the Oracle Content account folder. Often this is due to the Microsoft Windows operating system limiting the number of overlays that can be made to icons in the Windows file system. If you exceed the limitation, you may not see any sync status on your icons. If this happens, your files will still sync as long as the desktop app is still running.

Sometimes the overlays may disappear for a different reason. To try to restore the sync overlays, you can re-run the installer and select the option to repair the application.

1. In Windows 10, open the **Start** menu and click **Settings**.
2. On the Windows Settings page, click **Apps**.
3. Scroll to the bottom of the page to find the **Related settings** section and click **Programs and Features**.
4. Select **Content for Windows** in the list of programs, then click **Uninstall/Change**. If you are prompted to let the application make changes, click **Yes**.
5. When the installer is opened, click **Next** to continue.
6. Select **Repair** and click **Next**.
7. Verify that the screen specifies that it is ready to repair the program and not remove it. If it is ready to repair, click **Install**.
8. Once the installation is done, click **Finish**.

After you finish the repair, you need to restart the Oracle Content app. This happens automatically when you restart your computer, or you can do it manually.

1. Right-click on the Oracle Content icon in your Windows task bar and click **Exit**.
2. Locate the Oracle Content app in your Start menu and open it. The sync overlays should now be displayed in the account folder.

Note:

If the sync overlays do not reappear, then the issue is likely the problem imposed by the Microsoft Windows operating system limiting the number of overlays that can be made to icons in the Windows file system.

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

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

I can't check for updates

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

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

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

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

- **Refresh your content**

Right-click  in the notification area (Windows) or in the menu bar extras area (Mac), choose **Help**, choose **Troubleshoot**, and then choose **Refresh**.

- **Rebuild your synced folders**

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

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

- **Delete the Oracle Content account from your computer**

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

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

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

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

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

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

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

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

If you exit or quit the desktop app on your current computer, changes to files on this computer are no longer synced to other computers, and changes from other computers are no longer synced to this computer. Sync does continue between the cloud and other computers running

the desktop app (that is, between the cloud and your other computers, and those of people you are sharing files with).

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

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

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

I can't restore a folder I deleted

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

Troubleshoot Microsoft Office Add-On

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

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

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

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

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

The Office add-in radial menu appears when you edit a Microsoft file, such an Excel spreadsheet and it lets you quickly access several menu options. The Outlook add-in lets you add links to conversations and documents in your email using the Outlook

toolbar. If these add-ins become disabled, you can re-enable them following these steps:

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

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

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

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

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

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

There are several workarounds for this issue:

- Right click on the link and select **Open Link** to open the link in a browser.
- Remove the document name from the link.
- Replace the period in the document name with an underscore.

Any of those actions will open the file correctly.

Troubleshoot Mobile

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

- [I need to reset my passcode](#)
- [I can't view a file when I have Viewer rights in a shared folder](#)
- [I can't view a file that I downloaded](#)
- [I'm having trouble viewing a video](#)
- [I can't find my downloaded files on my device](#)
- [My file didn't sync in the Android app](#)
- [I got an error when transferring a file during sync in the Android app](#)

- [My edits don't appear in a file I synchronized on my Android device](#)
- [What do I do if my device is lost or stolen?](#)

I need to reset my passcode

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

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

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

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

I can't view a file that I downloaded

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

I'm having trouble viewing a video

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

When playing a video on an Android device, use the **Open In** option to play the video using a different viewer on the device.

I can't find my downloaded files on my device

You can see all your downloaded files by tapping **Documents** in the Oracle Content app navigation menu, then, in the filter menu, tap **Offline**.

When you download a file, it's downloaded to a secure area within the Oracle Content app, and you can access it from within the mobile app even if you're not connected to the cloud. For security reasons, it's not accessible outside the Oracle Content app, so you won't find it in your regular download folder or other folder on your device.

Note:

If you're using an iOS device and saved the file locally to your device, you can see it in the Files app.

To remove a downloaded or synchronized file, long-tap the file, select it, and then tap the delete icon. Removing these files from your device won't affect the original copy stored in the cloud.

My file didn't sync in the Android app

Sync may not happen for a couple of reasons:

- If you aren't connected to a network.
- If you don't have automatic sync turned on. Tap  to access your settings. Choose the account you want to use then tap **Synchronization Settings** and turn on auto-sync.

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

A sync error might happen in the following circumstances:

- If you're syncing a file and you lose your connection to Oracle Content or to the network. Try re-syncing the individual file or do a full sync of all files.
- If your local file storage is full. Your device may be out of space and can't save the synced file. Check your storage amount and delete files if needed.

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

When you choose to auto-synchronize a file on your Android phone or tablet, the file on your device is kept current with the file that's stored in the cloud according to the update frequency you specified. When the file in the cloud is updated, the copy on your device is automatically updated, too.

If you edit the file using another app on your Android phone or tablet, its counterpart in the cloud isn't updated automatically. You'll have to upload it to the cloud to update the copy there.

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

When you use Oracle Content Management from a mobile device or the sync client, the information about that access is saved. If you lose your device or it's taken, you should remove that device from the list of those used to access the service. To remove a device and revoke the access for it:

1. Sign in to Oracle Content Management in a web browser.
2. Click your user name and select **Preferences**.
3. Select **Linked Devices** from the dropdown menu near the Preferences heading.
4. Find the device to remove and click **Revoke**.

Your device's authorization to access the service is removed. The next time you or anyone else tries to activate the app on the device, the account is signed out and all local content stored on the device for that account is deleted.

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

Troubleshoot Sharing

Here are some questions you might have about sharing your content or sites.

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

I shared a folder with someone, but they can't use it the way I expected

When you share a folder, you assign a role to the people you invite to the folder. Depending on the role you assigned, that person may not be able to download files, edit files, or do other actions. You can change the role assigned to someone as needed

If you email a Member link to someone, that person must be able to log in to Oracle Content Management to access the files in a folder. If you need to share a folder with someone who doesn't have access to the service, email a public link instead.

If you created a public link for a folder then emailed that link to someone, that person may not have the necessary rights to the folder. The default role for public links is Viewer but you can change the default role. To see the defaults for your account, click your user name and then click **Preferences**.

Someone sent me a folder link, but I can't access the files there

You may not have the appropriate permissions to access a file in a folder. If the link is to a shared folder, you may have been removed as a member of the folder or your role may have changed in the folder, limiting your access to the files.

If the folder link was created as a public link, that public link might be removed and therefore the link will stop working. When a public link is sent, a role is assigned to the person receiving the link. If the link was sent with a Viewer role, then files can't be downloaded.

It's possible that someone may have deleted the folder that was shared with you. In that case, the link won't work.

I stopped sharing a folder and now the subfolders aren't shared

If you share a parent folder that you own and then change your mind and remove sharing, all the subfolders that were shared are no longer shared.

I have a link to a file or folder but it requires an access code

A public link can be created that requires an access code to use the link. This is created by the person who creates the link. You'll need to contact the person who sent the link to get the access code.

I can't get a public link to send to someone in a folder that's shared with me

When someone shares a folder with you, you're assigned a role. Depending on your role, you may not be able to email a public link to a file in that shared folder. When that happens, the Public link tab isn't available.

Files are missing from one of my folders that I shared

If you share a folder and assign a Manager or Contributor role to someone for the folder, that person can also delete files from the folder or delete subfolders.

If the item is deleted using the browser, the items appear in the Oracle Content Management Trash folder for the owner of the items and the person who deleted the items. Either the owner or the person who deleted the items can restore the items from Trash. Only the owner can permanently delete the items in Trash.

If the items are being synchronized using the desktop sync client, the deleted items appear in the recycle bin on your desktop even if you were not the person who deleted the items.

It's best to restore the files from the Trash folder using the web browser. That way you can be sure you have the latest copy of the information.

Your service administrator can set the length of time that items in Trash are retained. If the item is missing, it may be that your Trash was automatically emptied.

I can't create a public link to a folder I own

Your service administrator may have disabled public links. To check, click **Preferences**, then, in the menu, select **Documents**. Under **Sharing**, if the public links are disabled, you'll see a message to that affect.