opentext™

OpenText™ Content Server

# Smart View User Help

This online help describes how to get started using the Content Server Smart View user interface for storing, sharing, and distributing information.

CSSUI160211-H-UGD-EN-1

**OpenText™ Content Server**
**Smart View User Help**

CSSUI160211-H-UGD-EN-1
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Chapter 1

# Get Started

Content Server is comprised of two interfaces. The traditional Content Server view (*Classic View*), and the *Smart View* user interface, which is a responsive, widget based interface that is supported on multiple devices. This help is written for the Smart View user interface.

## 1.1 Navigate the user interface

### Common elements on the Content Server Home page

**Home**
Return to the **Content Server Home** page.

View your profile, switch to the Classic Content Server view, or sign out.

> **Note:** If your administrator has enabled the Enterprise Connect View option and Enterprise Connect is installed on your system, you can open the **Drag and Drop** panel. The panel displays the items in your current location in Context Server. You can drag items from Microsoft Outlook, IBM Notes, or Windows Explorer to the panel and those items are then added to Context Server. You can also drag items out of the panel to other locations and reorganize and choose columns. Context Server applies any rules that your administrator has set for collecting metadata, saving attachments, and handling conflicts or duplicate names to items that you add. The Enterprise Connect View option is available for all container types except for Context Server container types that Enterprise Connect considers to be document types, such as Compound Emails. It is not available for items that do not support browse views, such as Search Results.

**Favorites**
View items marked as Favorites. All items marked as Favorites appear in this list. If Favorites are organized by groups, they will appear under the group to which they were added.

**Show or Hide Breadcrumb Trail**
Show or hide the breadcrumb navigation. The *Breadcrumb Navigation Trail* shows a nested view of how you navigated to the current item.

**Search**
Search for items in Content Server or within containers and workspaces. Click to expose the **Search** field, type a search term, and then press **ENTER**. Click the Search field's **Command** menu to further refine the scope of your search. The default Search filters enable you to search the Enterprise Workspace or **Enterprise [All]**, which searches through all versions of documents in Content

Server. Additional Search filters may be available if they were set up and configured in Classic Content Server.

You can perform a basic search from anywhere you see the **Search** button.

## 1.2 Accessible compliant mode

The *Accessible compliant mode* improves the user experience by providing modified scrollbars, tables, and messages. This mode can be enabled by individual users, based on their preferences, in Content Server Smart View.

**To enable accessible compliant mode:**

1. Click the **Profile Menu** button, and then choose your user name.
2. Click the **Settings** tab.
3. Slide the **Accessible compliant mode** switch to the *on* position.

## 1.3 Keyboard navigation

Content Server supports keyboard navigation to provide users with an alternative way to perform functions that are normally performed using a mouse.

**Note:** For some functions, keyboard navigation may change to Mouse Keys, which allow you to use the numeric keypad on your keyboard to move the pointer.

The keyboard navigation for the **Action Bar** appears when an item is selected; the keyboard navigation for the **Action Bar** is the same as the mouse over navigation for the **Action Bar**.

### General keyboard shortcuts

| | |
|---|---|
| **CTRL+C** | Drag and copy items |
| **CTRL+X** | Drag and cut items |
| **CTRL+V** | Drop and paste items |
| **TAB** | Moves to the next interactive item |
| **SHIFT+TAB** | Moves to previous interactive item |
| **Left arrow** | Moves to the previous item in a menu or list, or leaves the menu |
| **Right arrow** | Moves to the submenu. For Workflow attachments, moves to the next option in the inline action bar. |
| **Down arrow** | Moves to the next line in a list or menu, or to the next entry if there is no submenu |
| **Up arrow** | Moves to the previous line on a list or menu. For tables, moves to the previous item in the same column. |

| | |
|---|---|
| **ENTER** | Applies the edit mode to fields. For buttons or menus, executes the associated actions. For files and user names, applies the default action. |
| **F2** | Use to Save and Exit while editing in multiline fields, such as the description of an item in metadata view. Clicking **ENTER** in such fields creates a new line.<br><br>Changes an element to Edit mode on editable metadata fields.<br><br>Triggers a rename operation of the item in the current row in the table view. |
| **SPACE** | Activate fields such as check boxes or radio buttons |
| **ESCAPE** | Close a list and leave edit mode |

## Dialog box or overlay keyboard shortcuts

| | |
|---|---|
| **TAB** | Moves to the next interactive item |
| **SHIFT+TAB** | Moves to the previous interactive item |
| **Left arrow** | Moves to the previous item |
| **Right arrow** | Moves to the next item |
| **Down arrow** | Moves to the same position on the next line |
| **Up arrow** | Move to the same position on the previous line |
| **CTRL+ Up or Down arrow** | Reorder or sort elements to previous or next line |
| **CTRL+ Left or Right arrow** | Reorder elements, or move within a tree structure |

## OpenText™ Extended ECM for Government

The following additional keyboard shortcuts are available when using Extended ECM for Government.

## Keyboard shortcuts for Extended ECM for Government

| | |
|---|---|
| **ALT+SHIFT +PRINT** | Switch to high contrast mode |
| **CTRL+ALT+M** | Move to the first entry of **My Inbox** in **My Workplace** |
| **CTRL+ALT+W** | Start navigating the File plan in **My Workplace** |
| **CTRL+ALT+G** | Move to **Group Inbox** |
| **CTRL+ALT+C** | Move to **My contributions** |
| **CTRL+ALT+P** | Move to **File plan** |
| **CTRL+ALT+O** | Move to **Folder** |
| **CTRL+ALT+D** | Move to **File inventory** |

| | |
|---|---|
| **CTRL+ALT+T** | Opens the **Filter** option to allow you to narrow results |
| **CTRL+ALT+I** | Opens the **Properties** page for the selected item |
| **CTRL+ALT+E** | Adds the selected item to a File plan folder |
| **CTRL+ALT+A** | Assigns the selected item to a user |
| **CTRL+ALT+S** | Starts the Workflow |
| **CTRL+ALT+R** | Creates an email reminder for the selected item |
| **CTRL+ALT+N** | Opens the **Add Item** menu |
| **CTRL+ALT+C** | Closes the **Properties** page |

## 1.4 Content Server Home page

The **Content Server Home** page is the starting page that users access when they sign in. The goal of the **Content Server Home** page is to provide users with easy access to the functionality that is specific to their needs. The **Content Server Home** page is made up of several smaller sections, called *tiles*. The tiles that appear depend on how the system is configured, and may differ from other default pages.

The following tiles appear on the **Content Server Home** page by default:

- Welcome
- Favorites
- Enterprise Workspace
- Personal Workspace (referred to as: <*User Name*> **Home**)
- My Assignments
- Recently Accessed

### Common tile elements

**Search**
Click to perform a search for items in Content Server. You can perform a basic search from anywhere you see the **Search** button.

**Maximize/Minimize**
Maximize or minimize the tile. You can also click on a tile header to maximize the tile window. Additional functions may be available for tiles when they are expanded.

## 1.4.1 Welcome tile

The **Welcome** tile that appears on the **Content Server Home** page is configured by your administrator, and may differ from user to user. It may contain messages to users, images, or links to videos or other documents.

## 1.4.2 Favorites tile

The **Favorites** tile lists all of the items you have designated as a Favorite. You can organize your Favorites by creating groups and moving existing Favorites to those groups.

For information about the tasks you can perform on items within tiles, see “Basic operations” on page 13 and “Documents“ on page 49

#### What can you do on the Favorites tile?

**Remove Favorite**

Click the **Remove Favorite** icon ★ to remove an item from your Favorites list.

**Rename Favorite**

Click **Rename Favorite** on the **Inline Action Bar**, then enter a new name. This renames the Favorite name only; the original item name is not changed.

**Organize Favorites into groups**

To move existing Favorites into groups, drag them from the list, and drop them into an available Favorites group.

**Note:** When you mark an item as a Favorite, you have the option to assign it to an existing group at that time. If no groups exist, the Favorite is automatically added to the `Ungrouped` container.

**Add group**

Click the **Add a new group** button +, type a name for the group in the field, and then press **ENTER**.

**Edit a group name**

Click the group’s **Edit** button, type a new name for the group, and then press **ENTER**.

**Search for a Favorite item**

Click the **Search** button, and then type a document name in the field.

**View Properties**

See “View properties” on page 17.

**Copy, move, or share items**

See “Copy and move items” on page 17 or “Share items” on page 17.

**Basic functions**

You can perform other basic tasks using the buttons on the **Inline Action Bar** or **More Actions** menu.

## 1.4.3 Enterprise and Personal Workspace tiles

The *Enterprise* and *Personal* Workspace tiles are containers where you store and organize content, and perform most tasks. For information about the tasks you can perform in workspaces, see “Basic operations” on page 13 and “Documents“ on page 49.

**Enterprise Workspace**
The Enterprise Workspace is a container that is shared across your organization. The content in this workspace can be viewed by all users in the organization, provided they have permission to view the items.

**Personal Workspace**
Your Personal Workspace is a container for your own use. With the exception of your administrator, you are the only user that has access to your Personal Workspace. Other users can access content in your Personal Workspace only when you grant them permission. By default, your Personal Workspace tile is called <*User Name*> **Home**.

## 1.4.4 My Assignments tile

The **My Assignments** tile lists Workflow Assignments, Task Assignments, and Reminders that are currently assigned to you. Each assignment contains details about the due date, priority, and status. Each Reminder contains details about the name and due date of the action item that it was created to track.

### What can you do on the My Assignments tile?

**Open a Task Assignment**

Click the assignment’s link to access the task in the Classic View.

**Open a Workflow Assignment**

Click the assignment’s link to access the Workflow step. Depending on the configuration of the Workflow step, the assignment might open in the Classic View. See “Workflows“ on page 127.

**Open a Reminder**

Click the Reminder’s link to open it in Classic View. See “Reminders in your assignments” on page 93.

**Search for an Assignment**

Click the **Search** button, then type the Workflow Step or Task name in the field.

**Open a Disposition Search**
Click the assignment's link to access Disposition or Accession Search results. See "Disposition and Accession Searches" on page 83.

### 1.4.5 Recently Accessed tile

The **Recently Accessed** tile helps you to quickly find documents or items you have recently opened, and provides details about the documents such as when it was last accessed, what user has it reserved, and where it is stored.

**Note:** Your Administrator can choose which item types to display on the **Recently Accessed** tile.

**What can you do on the Recently Accessed tile?**

**Add or remove Favorites**
Click the **Add Favorite** button or the **Remove Favorite** button to add or remove an item as a Favorite.

**Search**
Click the **Search** button, then type a document name in the field.

**View Properties**
Click the **Properties** button on the **Inline Action Bar**. See "View properties" on page 17.

**Copy, move, or share items**
See "Copy and move items" on page 17 or "Share items" on page 17.

**Basic functions**
You can perform other "Basic operations" on page 13 using buttons on the **Inline Action Bar** or **More Actions** menu.

## 1.5 Basic operations

You can perform many basic operations on multiple items using the functions on the **Action Bar**. The **Action Bar** appears when you select one or more items in a tile or folder.

When you are within a folder or workspace, items are shown in a list format, which is referred to as *Browse View*. When in Browse View, a group of buttons appear together on a toolbar, which is referred to as the **Inline Action Bar**. The **Inline Action Bar** appears each time you hover over an item, and displays the functions that are available for that item.

**Action Bar**

When you select one or more items in a tile or folder, the functions you can perform on those items appear in the *Action Bar*. The **Action Bar** functions are useful when you want to perform the same action on multiple items.

The options that appear may vary by user, workspace, or tile. The most common functions are: **Copy link**, **Edit**, **Share**, **View permissions**, **Download**, **Reserve**, **Copy**, **Move**, **Add version**, **Delete**, and **Start Workflow**.

Additional applications may have associated functions that are added to the **Action Bar**. For example, when editing a document, you can choose which editor you want to use from the **Edit** list, if multiple editors are available.

**Inline Action Bar**

The **Inline Action** bar appears for every item when you are in Browse View. The functions available on this menu depend on the item and your permissions on that item. To show this menu, point to an item.

### Common elements in Browse View

**Grid View**

Click the **Grid View** button to display items as thumbnails. When you display items in **Grid View**, most of the common functions that normally appear on the **Inline Action Bar** in Browse View are also available in Grid View. Additional buttons are displayed within each thumbnail that allow you to quickly make the item a Favorite, add comments, or view the item's properties. The Grid View is especially useful for viewing a container with multiple image files. Once you click on an image file, an expanded gallery window opens and **Previous** and **Next** buttons enable you to scroll through all images within that container. To return to Browse View, click the **Browse View** button.

**Note:** The **Grid View** option can be enabled or disabled by your administrator, so the **Grid View** button may not appear for all users.

**Search**

Click the **Search** button, type an item name in the field, and press **ENTER**.

**Favorite**

Click the **Add Favorite** icon to add a Favorite, or click the **Remove Favorite** icon to remove the item as a Favorite.

**Filter**

Click the **Filter** button to open or close the panel that enables you to filter contents. You can refine content by application type, item type, or the date the item was last changed. Additional filter options may be available, depending on how your administrator has configured the filter options.

To refine the search, select the check box for each type of content you want included in the search, then click **Apply**.

To save the filter, click the **Save As** button, enter a name for the filter in the **Save as** field, select the location where you want the results saved, and then click **Save**.

| | |
|---|---|
| | **Command**<br>Click the **Command** menu to view the **Properties** page, or perform other available functions for the item or container. Depending on your permissions, you may also be able to copy, move or delete the item, view its permissions, rename, share or copy the item's link. |
| | **Sort**<br>Click the **Sort Ascending** button or **Sort Descending** button to sort the columns alphabetically, by date, or by size. |
| | **Add Item**<br>Click the **Add Item** button to add Collections, Documents, Folders, Shortcuts, Web addresses, and Wikis. If other modules are installed on Content Server, additional items may appear on this menu. |
| | **Inline Reminder**<br>An **Inline Reminder** icon may appear for various items when you are in Browse View, if a Reminder was created for that item. See "Reminders" on page 89. |

## 1.5.1 Open items

When you click an item, it opens in its native application. Some documents may automatically open directly in the browser; others open using the Content Suite Viewer. Documents with multiple pages have thumbnails available for quicker access to a specific page. The Content Suite Viewer provides additional tools for viewing certain document types.

**Note:** Wikis and wiki items open in a wiki viewer window. For more information about working with wikis, see "Wikis" on page 109.

### Content Suite Viewer buttons

| | |
|---|---|
| | **Fit Width**<br>Fit contents to width of the window. |
| | **Fit All**<br>Reduce size to fit entire page into the window. |
| | **Zoom In/Zoom Out**<br>Zoom in or out on contents of the window. |
| | **Print**<br>Print current page or selection. |

**Go to next or previous page**
Move between pages of the document.

**Rotate page**
Rotate the page left or right.

### 1.5.2 Add items

You can add Collections, Documents, Shortcuts, Folders, and Web addresses by clicking the **Add Item** button +. The **Add Item** button appears anywhere you have permission to add items.

**Item types in Smart View**

**Collection**
A Collection is a container that is used to organize multiple items into a single, easy to access, location. See “Documents“ on page 49.

**Document**
*Document* refers to any type of document that you can add to Content Server. The icon that appears with the document name will change depending on the type of document it is. See “Documents“ on page 49.

**Wiki**
See “Wikis“ on page 109.

**Folder**
When you upload documents into Folders with required metadata, a dialog appears that requires you to fill out the required information before the document can be uploaded to the folder.

**Email Folder**
Use an Email Folder when the primary items stored in the Folder are Emails. The Email Folder displays additional columns related to Emails, such as **To**, **From**, **Subject**, **Sent Date**, and **Received Date**.

**Shortcut**
Shortcuts make it easy to access documents from a location that you choose. You can create Shortcuts to Folders or to specific items.

**Web address**
When you add a Web address, you provide a name for it, like you would for any other item you add to Content Server. The name of the Web address is what appears in the Browse View list of a container. You do not need to add `http://` to the Web address field; it is added automatically.

**Physical item**
A Physical item is a virtual object in Content Server that represents an actual object, such as a paper document, CD-ROM, or DVD. See “Physical Objects“ on page 75.

### 1.5.3 View properties

The item's **Properties** page lists general information about the item, such as when it was created or modified and who created it. See "Item properties and metadata" on page 57.

To view the **Properties** page, click the **Properties** button on the **Inline Action Bar**.

### 1.5.4 View Permissions

You can view the permissions level for users, groups, or objects within the Smart View by clicking **View Permissions** on the **Inline Action Bar** or from the item's **Command** menu . The **Permissions** page displays a list of users and groups that have access to the container, and displays the permission level assigned to each user and group.

To search permissions for a specific user or group, enter a partial user name or group in the **Permissions lookup** field.

See "Permissions" on page 59.

### 1.5.5 Share items

You can share a link to single or multiple items by selecting the items, then clicking **Share** in the **Action Bar**. Your default email application opens, and contains links to the selected items in the body of the email.

**Note:** If content sharing commands are available for an item, you can share a link by clicking **Share** in the **Action Bar**, and then clicking **Email link**. If the item is shared, the email contains a link to the shared item in OpenText Core Share as well as to the item in Content Server. See "Share items to OpenText™ Core Share" on page 99.

### 1.5.6 Copy and move items

You can copy or move items to another location in Content Server, as long as you have permissions to do so. When you copy and move items, you must choose whether the item's current Categories are retained, replaced by the Categories applied to the *destination container* (the container the items are moved or copied to), or merged.

**To copy or move items:**

1. Select the check box for each item you want to copy or move, and then click **Copy** or **Move** on the **Action Bar**.
2. In the dialog window, select the location to which you want the items copied or moved from the **Current Location** drop-down list.
3. Select one of the following options on the **Command** menu :

- **Keep original properties**, which retains items' original Categories. If no other option is selected, moved or copied items will keep the original Categories.
- **Apply destination properties**, which applies the Categories of the *destination* container to the copied or moved items.
- **Combine all properties**, which retains items' original Categories and merges them with the destination container's Categories.

4. Optional Select the **Open selected properties** check box to view the **Properties** page after the items are moved or copied.
5. Click **Move** or **Copy**.

## 1.5.7 Download items

You can download items and containers by clicking **Download** on the item's **Inline Action Bar**. If the item is a container, the **Download Zip file** window appears and lists all of the items that will be downloaded. Enter a name for the zip file, click **Download**, and then select the location on your computer where you want the ZIP file saved.

You can download multiple items and containers of items at one time by selecting the check box for each item or container, and then clicking **Download** on the **Action Bar**.

## 1.5.8 Delete items

You can delete items as long as you have permission to do so. If you want to delete multiple items, select the check box for each item, and then click **Delete** in the **Action Bar**. To delete a single item, hover over the item, then click **Delete** on the **Inline Action Bar**.

Chapter 2

# Activity feed

If Pulse is disabled, the user profile page will only show the **General** tab. If Pulse is enabled, the profile page will include tabs for **General**, **Following**, **Followers**, and **Activity**. These additional tabs each include an activity feed that shows both status updates that are posted from the Classic View and content updates for any object types that are configured to generate content updates.

If Comments are enabled, you can see the **Comment** icon in the expanded view of the activity feed. You can access expanded activity feeds from Profile page on the **Following** tab, the **Follower** tab, or the **Activity** tab. You can collaborate with other users by adding comments or replies to a status update or to a content update. By default, all comments and replies are public and visible to all users. To change the privacy settings of your updates, see "Your profile" on page 72.

**Notes**

- You may be able to perform one or more of the following collaboration actions depending which Collaboration features are enabled, such as adding comments, adding replies, attaching documents, and attaching shortcuts.
- You can add a comment or add a reply for an content update that appears in the activity feed and if commenting is enabled for that content type.
- If you are on the **Follower** tab, the **Following** tab, or the **Activity** tab of a Profile page, you may see a **New updates** prompt when other users add items to the system and post their status updates. If you click to accept the new updates, the activity feed will refresh to include the new information. You can also choose to cancel or ignore the update prompt.

Chapter 3

# Browser extensions

In order to perform certain actions such as editing a document, you might need to install or enable the Content Server extension in your browser. You can enable extensions for Microsoft® Edge, Google Chrome™, and Mozilla® Firefox®.

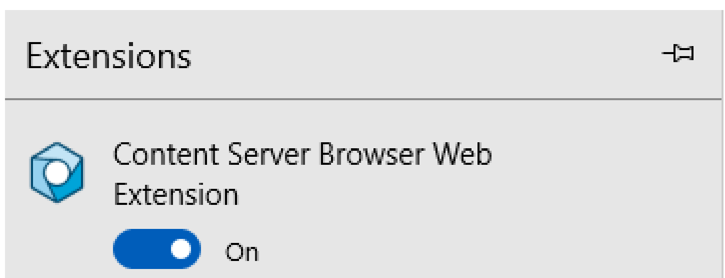
## 3.1 Enable the browser extension for Microsoft Edge

If the Content Server browser extension for Microsoft Edge is not enabled, you must enable it in the browser.

**To enable the browser extension for Microsoft Edge:**

1. Click the **Settings and more** button ···, and then click **Extensions**.

2. Turn on the **Content Server Browser Web Extension**.




**Important**
If the browser extension is not displayed in the list of extensions, it needs to be installed. Contact your administrator for more information.

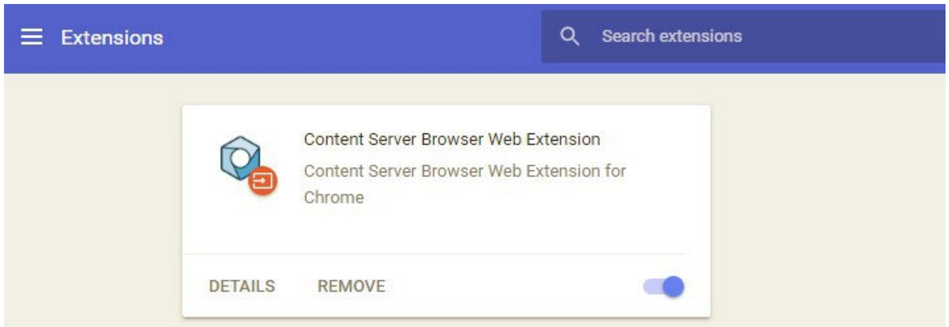
## 3.2 Enable or install the browser extension for Chrome

You might need to manually enable the Content Server browser extension for Chrome. In most cases, the extension is already installed in your browser. However, if it is not, you can download it from the Chrome Web store.

**To enable the browser extension for Chrome:**

1. Click the **Customize and control Google Chrome** button ⋮, and then click **More tools > Extensions**.

2. In the **Content Server Browser Web Extension** box, turn on the web extension, as shown in the following image.



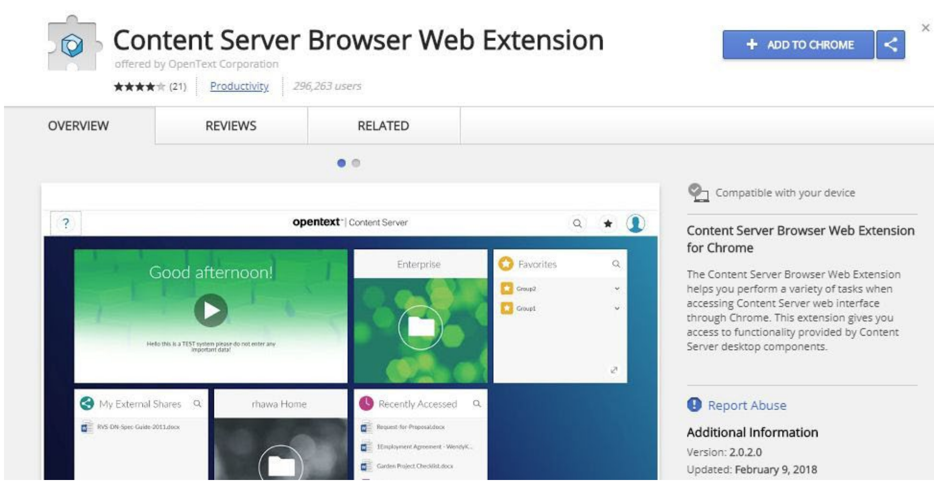

**To install the browser extension for Chrome:**

1. Click the following link to download the extension:

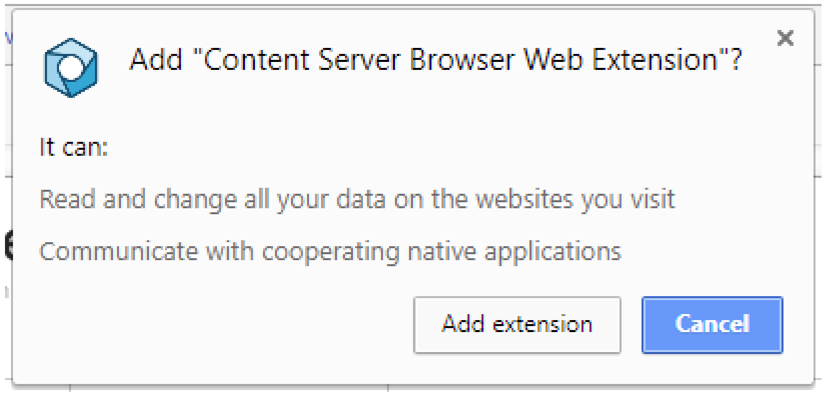
   Download the Content Server extension for Chrome from the Chrome Store (https://chrome.google.com/webstore/detail/content-server-browser-we/hlphpjodcfdblfmbbdjodbfmlonmidfh)

   **Note:** If the extension is already installed in your browser, the page will say **Added to Chrome**. In this case you do not need to download the extension.

2. Click **ADD TO CHROME**, as shown in the following image.




3. In the **Add "Content Server Browser Web Extension"?** box, click **Add extension**, as shown in the following image.

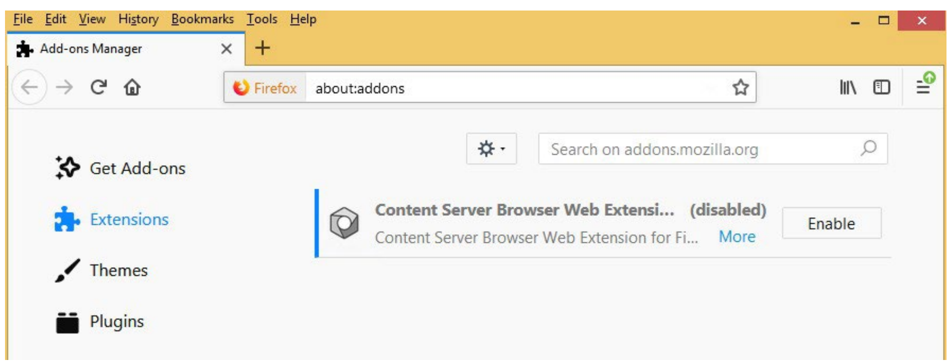



## 3.3 Enable the browser extension for Firefox

You might need to manually enable the Content Server browser extension for Firefox.

**To enable the browser extension for Firefox:**

1. To open **Add-ons Manager**, click **Tools > Add-ons > Extensions**.
2. Click **Enable** for **Content Server Browser Web Extension**, as shown in the following image.



Chapter 4

# Classifications

Classifications provide a way to organize, browse, and search for items in Content Server. The Classification hierarchy is configured in Classic View, but you can apply Classifications to items in Smart View.

### View and Apply Classifications

**View the applied Classifications for an item**

Click the **Properties** button on the **Inline Action Bar**. The applied Classifications are displayed on the **General** tab.

**Apply a Classification to an item from the Inline Action Bar**

Click the **Properties** button on the **Inline Action Bar**.

- If the item has no Classification, click the **Add properties** button, +, and click **Apply Classification**. Navigate to the Classification that you want to apply, and click **Select**.
- If the item already has a Classification, click the edit button beside the Classification field. Click the **Add new field** button to apply another Classification.

**Apply a Classification to multiple items**

Select the check box for each item that you want to classify, and click **Apply Classification** on the **Action Bar**. Navigate to the Classification that you want to apply, and click **Select**.

**Notes**

- The **Apply Classification** action must be enabled as a multi-select action in Records Management default settings.

For information about Records Management Classifications, see "RM Classifications" on page 79.

# Chapter 5

# Connected Workspaces

OpenText™ Connected Workspaces provides *business workspaces* to enhance collaboration. A business workspace is a document management area in Content Server that shares all information like documents, images and other objects, metadata, and workflows. It also provides business data, information about the team that works on the business workspace, social network functions, as well as relationships to other business workspaces.

The business workspace uses metadata stored in category attributes, which are displayed in tiles of the business workspace.

There are different types of business workspaces for different business object types and processes. For each type of business workspace, different templates, roles, and metadata sets can be applied.

A business workspace is based on a centrally managed template and classifications. The document template contains a folder structure. Additionally, the folders may contain documents and other Content Server items such as task lists.

*Extended ECM*

With Extended ECM, the business workspace is also connected to a business object in a business application. Metadata from the business application is transferred to the business workspace and thus is available to users in both systems. Users can create a business workspace and later add the business object reference. Metadata in category attributes may then be updated by the data stored in the business application.

## 5.1 Business workspaces

### Find a business workspace

You can use several ways to find a business workspace.

**Favorites tile**
All business workspaces that you marked as your favorite. The Favorites tile contains your personal list of favorite business workspaces

**Workspace tiles**
Tiles on your **Home** page contain business workspaces, which are important for your role. This is configured for you and others with a similar role. You can filter the tiles.

**Search**
Enter search criteria in the search bar and add a predefined filter. You may also have a Search Tile on your **Home** page. See “Navigate the user interface” on page 7.

### 5.1.1 Workspace tiles on your Home page

Your **Home** page can be configured to display tiles with business workspaces that you need most in your daily work. Each tile contains one workspace type. Name and icon differ accordingly. Business workspaces that you recently accessed are listed on top.

**My business workspaces**
Business workspaces that you last accessed.

**Sample icons for business workspaces**

- Business partner
- Product
- Purchase order
- Vendor
- Employee
- Contract
- Claim
- Task

**What can you do on the Workspace tile?**

**Open the business workspace**
Click the workspace name.

**Search for a business workspace**
Type some letters that are contained in the name of the business workspace. The list is immediately reduced to only show entries that contain these letters.

**Clear the search**
Display all items.

**Open the expanded view**
The expanded view shows more details than the tile. You can search for attributes here.

**What can you do in the expanded view of a Workspace tile?**

**Open the business workspace**
Click the workspace name.

**Search by name**
Type some letters that are contained in an attribute. The list is immediately reduced to only show entries that contain these letters. Your system configuration determines which attributes you can search.

**Clear all text in this field**
Display all items.

**Click to sort descending**
Sort by a column to quickly find a business workspace.

**Favorite**
Mark the business workspace as a favorite or remove the mark. Favorites workspaces are listed on the Favorites tile.

**Close expanded view**
Close the expanded view and return to the business workspace.

### 5.1.2 Tiles in a business workspace

Business workspaces are individually configured. Tiles define the different areas that display on the screen. They define the content and features that are available in context of a business workspace. Which tile is added to which kind of business workspace is individually configured when a system is set up.

Tiles provide the flexibility to adapt the interface to the information that is specific to this business workspace. Thus, your business workspace has an individual appearance depending on the content that you manage within the workspace.

**Header tile**
A header tile always displays. As minimum it contains the name and an icon for the business workspaces.

**Further tiles**
All other tiles are individually added one or multiple times. Every tile is configured for the data it displays with an explicit name or filter on content it displays. For example, a related business workspaces tile is added to display vendors. This tile is called **Vendor** and lists available vendor which are managed in different business workspaces.

**Tabs**
The tiles can be managed in one or multiple tabs. Every tab can get its individual name.

Available tiles and their features are described in the sub-chapters.

### 5.1.2.1 Header tile

The Header tile defines the header of a business workspace. The Header tile in a workspace contains the name of the business object, the workspace type, an image, and some significant metadata. It can also contain an activity feed for this workspace. The Header tile is reduced to a smaller tile if a second or third tab is opened.

**What can you do on the Header tile?**

- View attributes.
- Change the workspace icon. See “Edit a business workspace” on page 36.
- Mark this business workspace as a favorite.
- View and add comments, and reply to other’s comments. With sufficient permissions, you can also delete comments.

### 5.1.2.2 Related Workspaces tile

The Related Workspaces tile shows business workspaces that are related to the currently opened business workspace. You see the name of the workspace and selected attributes.

*Preview available if configured*

If configured and only for devices with a mouse, you may see a preview to the related workspace: hover over the related business workspace to see more information in a preview pane.

With Extended ECM: If an enterprise application is connected, you can click a link to open the business object in the enterprise application.

**What can you do on the Related Workspaces tile?**

**Open the business workspace**
Click the workspace name.

**Search by name**
Type some letters that are contained in an attribute. The list is immediately reduced to only show entries that contain these letters. Your system configuration determines which attributes you can search.

**Open the expanded view**
The expanded view shows more details than the tile. You can search for attributes here.

**What can you do in the expanded view of the Related Workspaces tile?**

**Open the business workspace**
Click the workspace name.

**Search by name**
Type some letters that are contained in an attribute. The list is immediately reduced to only show entries that contain these letters. Your system configuration determines which attributes you can search.

**Clear all text in this field**
Display all items.

**Click to sort descending**
Sort by a column to quickly find a business workspace.

**Favorite**
Mark the business workspace as a favorite or remove the mark. Favorites workspaces are listed on the Favorites tile.

**Close expanded view**
Close the expanded view and return to the business workspace.

**Add relationship**
Add a related business workspace. See "Maintain relationships between business workspaces" on page 37. On the following page, you search for business workspaces using search criteria. In the result list, you can expand each result entry to see more information. You can sort the list.

- **Hide Filter**
  Hide the side bar with the search criteria. Click again to show it.
- **Search view**
  Change between different search views to see more details in the result list or less.
- **Show description**
  In the tabular search view, you can show a line of description to each item in the result list.

**Remove relationship**
You can remove only manually added relationships. Automatically added relationships, for example by an external system, cannot be removed here. Select a relationship and click **Remove relationships**.

### 5.1.2.3 Team tile

The **Team** tile contains a list of all participants that are working in this business workspace. You see their name and a picture, as well as their role. An indicator is displayed if they belong to more than one role. You also see empty roles.

Click participant's name to open a window with the participant's profile. For devices with mouse: Move the mouse over a participant to see the profile in a pop-up. You can open the profile page and choose to follow this person's activities.

For more information, see "Teams and permissions" on page 45.

**What can you do on the Team tile?**

**Search for a participant**
Type some letters that are contained, for example, in the participants' name. The team list is immediately reduced to only these entries that contain these letters.

**Clear the search**
Display all items.

**Open the expanded view**
The expanded view shows more details than the tile. You can search for login name, email address, or department here. With sufficient permissions, you can also add and remove participants, and view roles.

### 5.1.2.4 Metadata tile

The **Metadata** tile displays information about the business workspace, which is stored in category attributes. With Extended ECM, the attributes originate from a business application, and you cannot edit them in the business workspace.

**What can you do on the Metadata tile?**

**Edit**
For devices with mouse: Click the **Edit** button for each attribute to change it.

For devices without mouse: Touch and hold the attribute field to open it for editing.

### 5.1.2.5 Document Templates Volume tile

With sufficient access rights, you can access the Document Templates volume through this tile. In the Document Templates volume, you can create or edit templates for business workspaces. See [xref to non-existent element "workspace-template"].

### 5.1.2.6 Extended ECM: Business Attachments tile

The **Business Attachments** tile for Extended ECM lists all business attachments for a business object. A business attachment is a document or another Content Server item, which you attach to a business object. The **Business Attachments** tile displays the business attachments of the current business workspace. A tile can also be configured to display attachments for another business object.

On the **Business Attachments** tile, you can also create a snapshot of business attachments. A snapshot freezes the current state of the business attachments and saves it in a subfolder in the business workspace.

For more information, see "Business attachments" on page 40.

**What can you do on the Business Attachments tile?**

**Search for a business attachment**
Type some letters that are contained in the name of the business attachment. The list is immediately reduced to entries that contain these letters.

**Clear the search**
Display all items.

**Open the expanded view**
The expanded view shows more details than the tile. You can create a snapshot here.

**What can you do in the expanded view of a Business Attachment tile?**

**Search**
Type some letters that are contained in an attribute. The list is immediately reduced to only these entries that contain these letters.

**Clear the search**
Display all items.

**Sort**
Sort by a column to quickly find a business attachment.

**See more or see less**
Display more information about a business attachment, or close the details view.

**Favorite**
Mark the business attachment as a favorite or remove the mark. Favorites business attachments are listed on the Favorites tile.

**Close**
Close the expanded view and return to the business workspace.

#### 5.1.2.7 Extended ECM: Dossier tile

The **Dossier** tile lists all documents in the business workspace as thumbnails of the first page of the document. If customized accordingly, you can sort the list by classification or creation date, view document metadata and include a document in your Favorite tile. The Dossier view is best viewed on its own tab and with full width.

**What can you do in the Dossier View?**

**Group documents by**
Click the drop-down button to select one of the options from the drop-down list:

- Creation date
- Classification

**Search groups**

Click the **Search** button to start entering the group name. The view is filtered to only show the groups that match the filter criteria.

Clip or tap the **Clear all** button to empty the search field and display all groups again.

**View metadata**

Under the document’s thumbnail, view metadata of the document, for example, Archive Date, Date of Origin, document MIME type.

**Mark as favorite**

Click the **Add Favorite** button to mark a document as favorite. The document will be displayed on the **Favorites** tile on your **Home** page. Click the icon again to clear the favorites mark.

**Open document**

Click the thumbnail to open a document.

### 5.1.2.8 Extended ECM: Header tile

The **Header** tile for Extended ECM contains the name of the business object, the workspace type, an image and some significant metadata. It may also contain a link to the business object in the business application. The Header tile can also contain an activity feed for this workspace. The Header tile is reduced to a smaller tile if a second or third tab is opened.

#### What can you do on the Header tile?

- View attributes.
- Open the business object in the business application.
- Change the workspace icon. For more information, see “Edit a business workspace” on page 36.
- Mark this business workspace as a favorite.
- View and add comments, and reply to other’s comments. With sufficient permissions, you can also delete comments.

### 5.1.3 Extended ECM: Scan barcode tile

With the **Scan barcode** tile for Extended ECM on mobile devices you can scan barcodes of objects to open the respective business workspace.

### 5.1.4 Tabs in a business workspace

A business workspace can have different tabs. It depends on your system setup, which tabs are configured in a business workspace. Tabs can also vary between workspace types.

For example, the following tabs can be configured:

**Overview**
: Displays the main page of a business workspace.

**Documents**
: Lists documents, images, and other files that reside in the business workspace.

**Related**
: Displays tiles with related workspaces, and, with Extended ECM, business attachments.

### 5.1.5 Create a business workspace

You can create a business workspace manually in a folder that is configured for it. The folder configuration determines which type of business workspace you can create. If configured, you can create a business workspace within other business workspaces. In this workspace hierarchy, user roles are also hierarchical. So typically, users who can access the parent workspace also have access to the child workspace within.

Click the **Add item** button +, and select the workspace type that you want to create. Enter a name for the business workspace and enter attributes. You can also add or remove categories, depending on your system setup.

Search **Add references**
: With Extended ECM you can add a business object as business reference. You search for a business object in the business application. Enter search criteria to reduce the result list. Click the required business object. Attributes are filled with the business object metadata. The name of the business workspace is composed of metadata according to system configuration.

: You can **remove** or **replace** the reference with another business object.

**Only required fields**
: Reduce the number of attribute fields to required fields. This option is only visible if fields are mandatory.

**Add an RM classification or add a category**
Depending on the configuration and your permissions, you can do the following:

- Add an RM classification to have records management information like the retention period. Browse or search for the required classification and click **Select**. For more information, see “Add an RM classification” on page 39.
- Add a category with attributes. You can add a category also later to a single business workspace. You can remove manually added categories. For more information, see “Add a category” on page 38.

**Remove this RM classification or category**
Remove a manually added RM classification or a manually added category from this business workspace.

## 5.1.6 Edit a business workspace

With sufficient permissions, you can edit a business workspace. Depending on what you want to edit, you do this either in a list view in the **Inline action bar**, or in the business workspace itself.

### What can you do in the list view?

**Properties**
View properties and change attributes, add or remove categories.

With Extended ECM: Add, remove or change the reference to a business object. See “Extended ECM: Change the business reference” on page 39.

**Copy Link**
Copy the link to the business workspace to your clipboard.

**Share**
Send an email with a link to this business workspace.

**Rename**
Change the name of the business workspace.

**Copy**
Copy the business workspace to the document templates volume to use it as a template for other workspaces. For more information, see “Copy or move a business workspace” on page 37.

**More actions**
Other functions depending on your permissions. You can, for example, move the business workspace to another folder or possibly delete it.

**Comment**
View and add comments, and reply to other’s comments. With sufficient permissions, you can also delete comments.

**Favorite**
Mark the business workspace as a favorite or remove the mark. Favorite business workspaces are listed in the Favorites tile.

**What can you do in the business workspace?**

**Change the workspace icon**
Open the business workspace. Click the icon. You can upload images in JPEG, PNG or GIF format, which are not larger than 1 MB. For best results, use a square image.

**Comment**
View and add comments, and reply to other's comments. With sufficient permissions, you can also delete comments.

**Favorite**
Mark the business workspace as a favorite or remove the mark. Favorite business workspaces are listed in the Favorites tile.

## 5.1.7 Copy or move a business workspace

You can copy a business workspace to another location, or you can move it. The new location can be a folder or another business workspace. The new location, however, must be configured for this workspace type, it must have the required classifications. You can check the classifications in the properties of the business workspace and compare them with the classifications of the target folder or workspace. Alternatively, your system administrator may have configured the system so that you can copy or move business workspace to locations with different classifications.

If you want to copy the business workspace within the same folder, you must rename it.

For Extended ECM: You cannot copy a business workspace, which has a business object attached.

## 5.1.8 Maintain relationships between business workspaces

Business workspaces can have relationships. Just as in real life a sales order is placed by a customer and contains products, a Sales Order business workspace also has relationships to the Customer and product business workspaces. Relationships can either be set automatically when business workspaces are created, or you can set them manually. Other than automatically set relationships, you can remove manually set relationships.

You maintain manual relationships on the expanded view of the Related Workspaces tile. See "Related Workspaces tile" on page 30.

You need special permissions for this action. If you cannot see the **Add relationship** button + or cannot select business workspaces, you do not have sufficient permissions.

**To add a relationship:**

1. Open the expanded view of a Related Workspaces tile.
2. Click the **Add relationship** button +.
3. Search for the business workspaces. You can select one or more business workspaces. You can select business workspaces on different pages or even select all business workspaces on one page. A counter tells you how many workspaces you selected.
4. Click **Add relationships**.

**To remove a relationship:**

1. Open the expanded view of a Related Workspaces tile.
2. Select all business workspaces for which you want to remove the relationship. You can only remove manually created relationships.
3. Click the **Remove relationships** button.

   If you do not see the **Remove relationships** button, you selected a business workspace with an automatically created relationship.

### 5.1.9 Add a category

Categories store attributes for a business workspace. Attributes are filled manually or automatically if a business application is connected. Usually, a new business workspace already has a set of relevant categories. If needed and if you have sufficient access rights, you can add another category.

**To add a category:**

1. Open the Properties of a business workspace.
2. Click the **Add a new category** button +.
3. Select the category and click **Add**.
4. Enter values for the attributes of the category.
5. Click **Add**.
6. To remove a manually added category, click the **Remove this Category** button ⊗.

## 5.1.10 Add an RM classification

You can add RM classifications if Records Management is enabled for this workspace type. RM classifications add records management information like the retention period. Usually, a new business workspace already contains RM classifications. If needed and if you have sufficient access rights, you can add another RM classification.

**To add an RM classification:**

1. Open the Properties of a business workspace.
2. Click the **Add a new RM classification** button +.
3. Select the RM classification and click **Add**.
4. Click **Yes** to add the RM classification also to sub-items of the business workspace.
5. Click **Add**.
6. To remove a manually added classification, click the **Remove field** button.

## 5.1.11 Extended ECM: Change the business reference

The reference object is the business object, which is linked to the business workspace. The business object is maintained in the business application and contributes its metadata to the business workspace. Usually, the business object is linked to the business workspace during creation of the business workspace. However, if you needed to change the business object, you can replace it. You need special user rights to replace a business object.

The metadata of the business object can influence both title and the location of the business workspace. If you replace the reference object, the business workspace gets a new title, it is however, not moved to a different location. You can move it manually. See “Edit a business workspace” on page 36.

**To replace a business object:**

1. Open the Properties of a business workspace.
2. Click **Replace** and find the new business object.

## 5.2 Business attachments

This feature is only available with Extended ECM.

A business attachment is a Content Server document or folder, which you attach to a business object in a business workspace. You can use this business attachment to create a connection between a document that is stored anywhere in Content Server, and a business object. Usually, these documents have a global character and belong to more than one business object

Business attachments are listed in a tile in the business workspace. The Business Attachment tile may contain attachments of the business object of the current business workspace as well as other attachment of any other business object.

### 5.2.1 Add a business object to a document

With sufficient permissions you can add a business object to a document or another Content Server item. From point of view of the business application, this document is then a business attachment to the business object.

**To add a business object to a document:**

1. Click the **Properties** button in the action bar of a document.
2. From the menu bar, select **Business Objects**.
3. Click the **Add Business Object** button and select the business object type.
4. Enter search criteria to find the business object and click **Search**.
5. Select one or more business objects and click **Attach**.
6. The business object is now attached to the document. You can now do the following for each business attachment:

   **Detach**
   Detach the business object from the document.

   **Display**
   Open the business application in a new browser window and see details of the business object.

   **Go to Workspace**
   If a business workspace for this business object exists, you can open it from here.

### 5.2.2 Create a snapshot

On the **Business Attachment** tile, you can create a *snapshot*. A snapshot preserves a defined version of a document and makes it accessible in a folder in the business workspace. The snapshot creates a folder with a name configured for the respective Business Attachments tile. You can create a snapshot for all business attachments on one tile or selected documents.

Snapshots create a *Generation* of a document, which is a distinct Content Server item. Thus, you can apply access control or Records Management to it as required, independent of the original.

**To create a snapshot:**

1. Open the expanded view of a business attachments tile.
2. Select all documents, which you want to include in the snapshot.
3. Click **Snapshot**.

   The snapshot is being created. You recognize snapshot documents by the anchor icon: 

## 5.3 Discussions

A Smart View Discussion is an area where you can discuss topics by asking questions and replying to questions. You can also search previous questions or follow the activity for one or more questions. Your administrator may configure one or more Discussions in your business workspace.

**Note:** Smart View Discussions are designed for use in a business workspace and are not supported outside of the context of a business workspace.

In a business workspace, each Discussion can appear as a tile or as an expanded view. For example, on the **Overview** tab, the Discussion tile shows the most recent questions. You can see a more detailed view by clicking any question to open an expanded view that shows the complete question-and-answer timeline for all previous questions.

**Notes**

- A Discussion timeline shows the question with the most recent activity first, followed by questions with the next most recent activity.
- If you edit an existing question or reply, the timestamp for the post continues to show the Created Date, but the Discussion sorting automatically updates to reflect the Modified Date, with the most recently modified posts listed first.
- After the Discussion tile is added to the business workspace, the Discussion must be associated with a Forum object. An administrator can configure the

Discussion to automatically link to the Forum in the business workspace or to link to a specific Forum elsewhere. Only administrators can create new Forums in the business workspace template, but users who have write permissions for the business workspace folder can create new Forums in that folder.

### What permissions do I need to use a Discussion?

- To add a question or post a reply, you need *Edit* permission.
- To search for a question, you need *Read* permission.

### What can you do in a Discussion?

**Ask a question**

Start by searching through the previously asked questions. See Search through previously asked questions on page 44.

If your question has not been previously answered, in the **Ask a question** dialog box, type your question, optionally add an image, and then click **Post**. See also Add an image to a question or a reply on page 42.

> **Note:** A discussion post, either a question or a reply, can include a maximum of 2 million characters.

**Add an image to a question or a reply**

In the **Ask a question** dialog box or the **Write a reply** box, click the **Add image** button, browse to select the image file, then click **Open**. After the image file finishes processing, click **Post**.

> **Note:** A discussion post, either a question or a reply, can include a maximum of 2 million characters.

**Delete a question or a reply**

- On the Discussion tile, click **Replies** to open the question and its replies in the expanded view. Point to the header of the question or reply that you want to delete and click the **Delete** button.
- In the expanded view, point to the header of the question or reply that you want to delete and click the **Delete** button. If there are more than three replies, you may need to click **View previous replies**.

**Edit a question or a reply**

- On the Discussion tile, click **Replies** to open the question and its replies in the expanded view. Point to the header of the question or reply that you want to edit and click the **Edit** button . Edit the question or reply as needed, then click **Post**.

- In the expanded view, point to the header of the question or reply that you want to edit and click the **Edit** button . If there are more than three replies, you may need to click **View previous replies**. Edit the question or reply as needed, then click **Post**.

**Notes**

- If you edit an existing question or reply, the timestamp for the post continues to show the Created Date, but the Discussion sorting automatically updates to reflect the Modified Date, with the most recently modified posts listed first.
- A discussion post, either a question or a reply, can include a maximum of 2 million characters.

**Expand the Discussion tile**

On a Discussion tile, click a question to open the expanded view.

**Follow/unfollow a question**

From the expanded view, follow one or more questions to be notified of any updates.

- **Follow/unfollow a single question**

  In the question area for an individual question, do one of the following:

  – To follow an individual question, click **Follow**.

  – To stop receiving notifications for that individual question, click **Following** and then click **Unfollow**.

- **Follow/unfollow all questions in the Discussion**

  In the header of the full-page Discussion view, do one of the following:

  – To follow all questions in a Discussion, in full-page Discussion view, in the header, click **Follow all**.

  – To stop receiving notifications for all questions in the Discussion, click **Following all** and then click **Unfollow all**.

**Open a question in a new tab**

- From the Discussion tile, open a question in its own tab by clicking a recent question from the list, or by clicking a question from the search results.
- From the expanded view, open a question in its own tab, by performing a search and then clicking a search result.

See Search through previously asked questions on page 44.

**Notes**

- When you click multiple questions, each opens in its own tab.

- Click the **Previous** button ‹ and the **Next** button › to scroll through multiple tabs.
- In the search results, any question already appearing in its own tab is marked with a check mark.

**Close a question**

On the full-page Discussion view, point to the question name on the tab and click the **Close** button ✕. Close all questions on individual tabs to revert to the Discussion timeline for all questions.

**Reply to/answer a question**

Navigate to the question that you want to answer. See Search through previously asked questions on page 44. Scroll to the last reply and click **Reply**. In the **Write a reply** box, type your answer, optionally add an image, and then click **Post**. See Add an image to a question or a reply on page 42.

**Note:** A discussion post, either a question or a reply, can include a maximum of 2 million characters.

**Review the entire Discussion timeline**

By default, the full-page Discussion view lists all questions chronologically, with the most recent activity appearing first. Close all questions on individual tabs to see the Discussion timeline for all questions.

**Return to the business workspace**

From the full-page Discussion view, on the header, click **Back to** <*workspace name*> button ←.

**Search through previously asked questions**

In the **Search discussions for questions** box, type the keyword that you want to search, then click the matching question that you want to open.

If you click multiple questions, each will open in its own tab. Each open question shows a check mark in the results list.

If the search doesn't find any matches, you can ask a new question. See Ask a question on page 42.

**Notes**

- The Discussion search holds the most recent search and the search results in memory.
- The search looks for an exact whole word match.

**See all the replies to a question**

Replies appear in chronological order, with the oldest replies first.

- On the Discussion tile, click **Replies** to open the question and its replies in the expanded view.

- In the expanded view, if there are more than three replies, click **View previous replies**.

## 5.4 Teams and permissions

Users that collaborate in a business workspace are *participants* in a *team*. A participant can be member of more than one *role*. A role is a set of permissions that define what a participant in this role can do or see in a business workspace. Participants can, for example, edit and add documents, or only be able to read documents. One of the roles is the *team lead*, which provides administrative rights to its participants.

*Workspace template*

Roles and participants usually are defined for a workspace template, which means that all business workspaces of the same type initially have the same roles and participants.

The expanded view of the **Team** tile has two tabs: **Participants** and **Roles**.

**Participants tab**

The tab displays all users who collaborate in this workspace. With sufficient permissions, you can add or delete participants, and change the role membership of participants.

If you remove all roles from participants, they are no longer part of the team.

**Roles tab**

The **Roles** tab displays roles that are configured for this business workspace. One of the roles is marked as **Team Lead**, which provides extended permissions for its participants. With sufficient permissions, you can delete roles.

If you delete a role, all participants of that role will be removed from the team, unless they are a member of another role.

### What can you do on the Participants tab?

**Add a participant**

Click the **Add participants** button. In the **Add participants** dialog, enter the name of the new participant. A list of matches is displayed as you type. Select the participant. You can add several participants at once.

Select a role for the new participant. You can assign more than one role. You can also assign the same role to all new participants.

Click the **Remove** button to remove a participant from the list of new participants.

Click **Clear all** to remove all new participants from this dialog box and start over.

Click **Save** to add the new participants to the business workspace.

**Assign roles to a participant**

Select a participant and click **Show Roles**. Alternatively, you click the **View or edit participants role memberships** button in the **Inline action bar**. The window displays assigned roles and roles that are available but not assigned.

Click the available role to assign it.

Click the **Remove** button ✕ to remove the role from the participant. If you remove *all* roles, the participant is no longer member of the workspace team, and thus cannot access the business workspace. However, you can remove all roles in this dialog and then add new ones before you save your changes.

Click **Reset** to restore the last role assignment and keep the dialog open.

**Remove a participant from the team**

Select the participant, and click **Remove from team**. Confirm that you want to remove this participant from the team. This also removes all roles from the participant.

**Download list of participants**

Select a single participant or all participants and click the **Download list of participants** button. This exports the list in CSV format, which you can edit, for example, in Microsoft Excel.

### What can you do on the Roles tab?

**View role details**

Click the role. Alternatively, select a role and click the **Show details** button. You see details about the role and all participants that are members of this role. You can also see if this role is a team lead role.

**Delete a role**

Select the role, and click **Delete**. Confirm that you want to delete this role. This removes all participants from the team that only belong to this team role.

**Download role participants**

Select a single role or all roles and click the **Download list of roles** button. This exports the list in CSV format, which you can edit, for example, in Microsoft Excel.

## 5.5 SAP only: Report an incident to SAP Solution Manager

You can report SAP related incidents, which occur while you are working with Extended ECM for SAP Solutions, directly from Content Server to your local SAP Solution Manager. For more information about SAP Solution Manager, see https://help.sap.com/viewer/p/SAP_Solution_Manager.

**To report an incident as a user:**

1. Click the **Profile Menu**.
2. Click **Report incident to SAP**.
3. Fill in the required information in the incident report and save your data.

Chapter 6

# Documents

*Document* refers to any file type that you can add to Content Server. You can add documents from the **Add Item** menu +, or drag and drop them from your computer to any tile that you have permission to add items.

Use the **Inline Action Bar**  to make changes to single items.

To make changes to multiple items at once, use the **Action Bar**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**Note:** Some document file types support specific actions. For example, after creating a wiki container, you need to add and edit wiki pages. For more information about how to use a wiki, see “Wikis“ on page 109.

### What can you do with Documents?

**View Properties**
: Click the **Properties** button on the **Inline Action Bar**. See “View properties” on page 17.

**Rename items**
: Click **Rename** on the **Inline Action Bar**, then type a different name in the field.

**Share**
: Click the **Share** button on the **Inline Action Bar**. See “Share items” on page 17.

**Download**
: To download a single item, click **Download** on the **Inline Action Bar**.

  To download multiple items or containers, select the check box for each item, and then click **Download** on the **Action Bar**. In the **Download Zip file** window, type a new name for the file in the **Zip file name** field or keep the default name, click **Download**, and then select the location on your computer where you want the ZIP file saved.

**Reserve/Unreserve**
: Click **Reserve** on the **Inline Action Bar**. Reserved items are identified with the **Reserved** icon. Click it to unreserve the item.

**Add Version**
: On the **Inline Action Bar**, click the **More** button, choose **Add Version**, then select a file.

**Note:** If you add a new version to a document that you did not reserve, a warning message displays asking you if you want to continue. You should always make sure the version you are adding will not overwrite changes made by other users.

**Edit**

Click the **Edit** button on the **Inline Action Bar** to open the document in the respective application to make changes.

The edit options may vary based on the file type, and may change if additional editors are available. For example, if one text editor is available, the **Edit** button appears on the **Inline Action Bar**. If more than one editor is available, the **Edit** button becomes a drop-down list that allows you to choose which editor to use.

**Copy and move**

See "Copy and move items" on page 17.

**Delete**

See "Delete items" on page 18.

**Mark item as Favorite**

Click the **Add Favorite** icon . The **Favorites** icon is solid when an item is marked as a Favorite. If you organized your Favorites into groups, a dialog window appears where you can select a group to add the Favorite to, or rename the Favorite item. Renaming the Favorite does not rename the original item. The Favorites functionality applies to items within Browse View, as well as the top-level containers in Browse View.

**Add to a Collection**

Open the Collection, click the **Add item** button , select the items or containers you want to add to the Collection, then click **Add selected.**

**Remove from Collection**

From within the Collection container, click **Remove from Collection** on the item's **Inline Action Bar**, then click **Yes** to confirm. You can also remove multiple items or containers from the Collection at once by selecting the items, then clicking **Remove from Collection** on the **Action Bar**, then clicking **Yes** to confirm.

Chapter 7

# Edit Smart View Pages

If the administrator assigns you the appropriate privileges and permission, you will be an advanced user who can see the **Edit Page** command in your User menu. This **Edit Page** command invokes the **Edit Page** tool, which allows you to edit what a user or a group of users sees when viewing a Landing page or a container in Smart View.

**Notes**

- Administrators and other advanced users may be familiar with the term *perspective* when talking about what a user or group of users sees in Smart View.
- To see the **Edit Page** command and to use the **Edit Page** tool, an administrator must provide you the following access:
  - ActiveView object privilege
  - Perspectives Tab usage privilege
  - Modify permission for the perspective of the current Smart View page

This chapter includes the following information:

- How to use the Edit Page tool to work with the current perspective. See "Use the Edit Page tool" on page 51.
- How to configure the widgets that you can add to the perspective. See *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)*.

## 7.1 Use the Edit Page tool

When you invoke the **Edit Page** tool, the *Edit mode* opens for the perspective of your current Smart View location, whether that is a *Landing page* or the *current local container*. In Edit mode, click the **Add widget** button + to open the Edit Page panel.

**Table 7-1: Advanced user actions**

| Location | Create | Edit |
|---|---|---|
| Container that has a perspective already in effect. | Cannot create a new perspective for the container. This functionality is supported in the Perspective Manager if they have Add Item permissions for the Perspective Volume. See | Can edit the current perspective for the container if you have Modify permission for that perspective. |

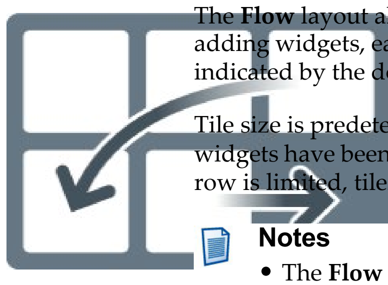
| Location | Create | Edit |
|---|---|---|
| | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG).* | Cannot edit multiple perspectives for the container.<br>This functionality is supported in the Perspective Manager if you have Modify permissions for those perspectives. See *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)*. |
| Container that does not have a perspective. | If you have Add Item permissions for the Perspective Volume, the Edit page tool automatically creates a new perspective in the Perspective Volume when you open the Edit page tool from that container.<br>The new perspective will be named:<br>*<containerName>* + *<creationTimeInMilliSeconds>*<br><br>**Note:** If you do not have Add Item permission for the Perspective Volume, you will not see the Edit page tool. | Can edit the newly created perspective. |
| Landing page | Cannot create a new perspective for the landing page.<br>This functionality is supported in the Perspective Manager if you have Add Item permissions for the Perspective Volume. See *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG).* | Can edit an existing perspective for the landing page if you have Modify permission for that perspective.<br>The Edit Page command is only available if there is an existing perspective available for the landing page. |
| | | Cannot edit multiple perspectives for the landing page.<br>This functionality is supported in the Perspective Manager if you have Modify permissions for those perspectives. See *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)*. |

## 7.1.1 Choose a layout

The layout controls the distribution and behavior of the tiles in a perspective. Depending on the layout, some tiles will resize in response to a change in page size.

In Edit mode, click the **Add widget** button + to access the Edit Page panel. Click **Change page layout**, then click the layout that you want. After choosing the layout, you can choose and configure the widgets that you want to include in the perspective.

### Which widget layout do you want?



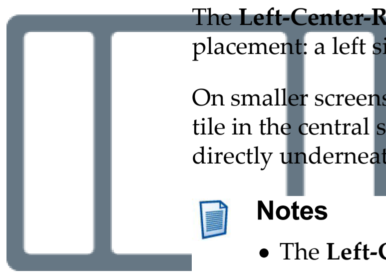
**Flow**

The **Flow layout** allows tiles to follow each other sequentially. When adding widgets, each new widget is added to the next available tile space, indicated by the dotted outline next to the last tile added.

Tile size is predetermined according to the widget selected. After all widgets have been added, you can drag to rearrange the tiles. If space on a row is limited, tiles will wrap to the next row.

**Notes**

- The **Flow** layout allows you to drag the tiles to rearrange them.
- Tile widths are fixed and predetermined according to the widget selected.
- Tile height is automatically determined by the screen size.



**eft - Center - Right**

The **Left-Center-Right** layout provides three columns for widget placement: a left sidebar, a central section, and a right sidebar.

On smaller screens, the three columns condense into a single column. The tile in the central section becomes topmost, with the left sidebar tile directly underneath, and the right sidebar tile at the bottom.

**Notes**

- The **Left-Center-Right** layout does not support dragging to rearrange already placed widgets. Instead, you must remove the existing tile and drag the new widget in its place.
- Tile height and widths are predetermined to fill the slot.

**Important**

- Changing the layout of the current widgets will clear any existing widgets and all the previously configured widget information.
- If you want to change the layout, make sure you do so before adding or configuring any widgets.

### 7.1.2 Choose and configure the widgets

In Edit mode, click the **Add widget** button + to access the Edit Page panel so that you can choose and configure the widgets that you want to include on the page.

**Important**

- Changing the layout of the current widgets will clear any existing widgets and all the previously configured widget information.
- If you want to change the layout, make sure you do so before adding or configuring any widgets.

#### How can you configure widgets?

| | |
|---|---|
| **Drag Widgets** | Drag widgets from the Edit Page pane to the empty tile outlines in the work area. |
| **Arrange Widgets** | Drag the widgets to change their order and placement, as permitted by the layout.<br>**Note:** Remember that the layout you select can affect the arrangement and size of the widgets. For more information, see “Choose a layout” on page 53. |
| **Configure Widgets** | Each widget may have zero or multiple configurable options. After you drag the widget to the work area, click the widget to open the configuration panel. For more information about the configuration options for the different widgets, see “Widget configuration” on page 54. |
| **Remove a Widget** | Click the **Remove** button to remove a widget from the current page. |

## 7.2 Widget configuration

<xi:include>
<xi:fallback></xi:fallback>
</xi:include>

After you drag the widget to the work area, click the widget to open the configuration panel.

| Widget group name | Configuration information |
|---|---|
| Content Sharing | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Connected Workspaces | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |

| Widget group name | Configuration information |
|---|---|
| Communities | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Standard Widgets | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Collaboration | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Extended ECM for Engineering | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Extended ECM for Office 365 | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Extended ECM Platform | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Physical Objects Reports | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Records Management Reports | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Security Clearance Reports | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Physical Objects | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Content Intelligence | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |
| Workflow | *OpenText Content Server ActiveView Perspective Manager - Online Help (CSAV-H-APG)* |

Chapter 8

# Item properties and metadata

The **Properties** button is available for all items in Content Server, either on the **Inline Action Bar** or the **Action Bar**.

The **Properties** page is organized according to specific types of metadata. The **General** tab provides basic information about the item, such as when it was created or modified and who created it.

If an item has Categories assigned to it, the names of the Categories appear as separate tabs on the **Properties** page. Additional sections may appear, depending on other products that are installed with Content Server.

### What can you do on the Properties page?

**Open an item**

An image of the item appears in the **General** tab. Click the item to open it, or save it to your computer.

**View version history**

Click **Versions** on the **Command** menu of the **Properties** tab.

**Edit attributes and metadata**

Click an item's **Edit** button , then update the information in the corresponding field.

**Assign a Classification**

Click **Add a new Classification** on the **Add** menu , navigate to a Classification, and then click **Select**.

You can assign Classifications to items in Smart View, as long as the Classification already exists in Content Server. New Classifications can be created in Content Server Classic View.

Classifications can also be assigned at the time you add an item in Content Server Smart View. If the item you are adding contains any required metadata, you will be redirected to the **Properties** page to enter the metadata prior to adding the item, where you can also assign Classifications.

If the **View Records details** icon is displayed for a classified item, click it to be redirected to the **Records Management** tab of the **Properties** page.

**Assign a Category**

Click **Add a new Category** on **Add** menu , select the Category you want to assign, and then click **Add**. In the Add Category window, update any of the fields, and then click the **Add** button.

You can assign Categories to items in Smart View, as long as the Category already exists in Content Server. New Categories can be created in the Content Server Classic View.

**Remove a Category**
Hover on the tab for the Category you want to remove, click the **Remove this Category** button, and then click **Yes** to confirm.

**View metadata for other items**
The **Properties** page contains a panel that lists other items in the current workspace or container. You can click on any item to view its metadata.

Chapter 9

# Permissions

*Permissions* are rules that govern how users and groups interact with items in Content Server. Defining appropriate permissions for users and content is important because it allows you to effectively manage the security of the information stored in Content Server.

## 9.1 Basic permissions

Permissions that are applied to items and containers are called *Document Management* permissions. You can assign permissions on a specific item, granting a user, or group of users, the ability to see or modify the item. For example, you may want to allow an entire group of users to open or download a document, but you want to allow only select users to edit the document or add a new version of it. Document Management permissions enable you to decide how other users interact with your content.

When you assign permissions on an item, you can grant users different permissions.

- **Read** permission, which allows them to see and open items.
- **Write** permission, which allows them to make various changes and delete items.
- **Full control** permission, which grants them full permissions on the item.

**Note:** When you grant a higher level permission, such as **Full control**, the lower level permissions, such as **Write – Reserve**, are automatically granted. If you want to grant permission for specific functions, you can select **Custom** and then choose the individual permission.

| Document Management permission | Description |
|---|---|
| Read – See | Allows users to see that items exist, but they cannot open the items. |
| Read – See contents | Allows users to open the item and see its contents. |
| Write – Modify | Allows users to rename the item and modify metadata on the item's **Properties** tab. |
| Write – Edit attributes | Enables users to apply Categories to an item, or modify the item's existing Categories and Category attributes. |
| Write – Add items | Enables users to add items to a container. |
| Write – Reserve | Allows users to reserve an item, which prevents other users from modifying it. |

| Document Management permission | Description |
|---|---|
| Write – Add major version | Enables users to add a version of an item. You must first grant the **Reserve** permission. |
| Write – Delete version | Allows users to delete versions of an item, but does not allow them to delete the original item. |
| Write – Delete | Allows users to delete versions of an item or the original item. |
| Full control – Edit permissions | Enables users to edit the permissions on the item. When you grant the **Edit permissions** permission, you are giving that user or group full control of the item. |

## 9.1.1 Permissions terminology

**Access Control**
The process by which Content Server controls access to items and information in the system.

**Access Control List (ACL)**
The list that Content Server maintains for every item in the database. The ACL that specifies which users and groups have permission to view an item, as well as the actions those users are allowed to perform on the item. The ACL also includes the Owner, Owner Group, and Public Access permissions.

**Document Management Permissions**
The rules that are applied on an item-by-item basis. These permissions control which users and groups see specific items and what operations can they can perform on the items. Document Management Permissions apply to most Content Server items, such as documents and containers.

**Owner**
The user that has full permissions on the item. Be default, the Owner is the user who created the item. However, the Owner of the item can be changed.

**Owner Group**
The item’s Owner Group is a group assigned to the item, usually so that the members of that group can be given additional permissions on the item. An item’s Owner Group is inherited from the Owner Group of the container the item is created in, but it can be changed.

**Permissions**
The rules that control what users see and do in Content Server.

**Privileges**
Privileges are rules that control your ability to perform functions at a system-wide level. Unlike permissions, which operate on an item-by-item basis, privileges control your ability to perform specific tasks, such as logging in to Content Server, adding or modifying users and groups, or performing administrative tasks.

**Public Access**

Public Access is a system-wide privilege that is granted to users by administrators. Users that have the **Public Access** privilege can see any item or container that is designated as a *Public Access* item. You can modify the **Public Access** permission on specific items and containers the same way as you would for other users or groups.

## 9.1.2 Add, change, or remove permissions for an item

Permissions for containers and items are managed on the item's **View Permissions** page. To access the **View Permissions** page, click **View Permissions** on the item's Inline Action Bar. If the item is a container, you can also access the permissions page from the Command menu.

**Add permissions**

Click the **Add** button, and then click **Add user or groups**. In the **Add users or groups** window, select the user or group for which you want to add permission, and then click **Next**. When the **Permissions** dialog box opens, you can select **Read**, **Write**, or **Full control**, depending on the level of permissions you want to grant this user or group. If you want to grant only certain permissions, select **Custom**, and then select the check box for each individual permission you want to grant. When you are finished, click **Done**.

> **Note:** Select **Groups where I am member** from the **Command** menu to limit the search results to show only those groups for which you are a member.

**Edit permissions**

Click the **Edit permissions** button for the user, group, or Public Access group that requires permission changes, and then select **Read**, **Write**, or **Full control**.

If you want to select specific permissions within the **Read**, **Write**, or **Full control** permission levels, select **Custom** to open the **Permissions** dialog box, and then select the check box for each permission you want to grant.

**Remove Permissions**

Click the **Remove** button for the user or group. If the item is a container, you will be asked to confirm that you want permissions removed from all items in the container. Click **Apply** to confirm.

**Look up permissions for a user or group**

Enter a user name or group name in the **Search** field, and then select the user or group.

**Change owner or owner group**

Click the **Change owner** button or **Change owner group** button, type the first few letters of the user or group name in the field, select a user or group from the list, and then click **Save**.

**Remove Public Access**

Click the Public Access group's **Remove** button.

If the item is a container, you will be asked whether you want the change applied to sub-folders. To remove Public Access from items in the sub-folders, slide the **Apply to sub-folders** switch to the **On** position, and then click **Apply**, or click **Cancel** to retain the Public Access permissions for those items.

**Note:** If you want to prevent users with the Public Access privilege from seeing the item, but still want the item designated as a Public Access item, you should change the Public Access permissions to *None*, rather than removing Public Access from the item.

**Restore Public Access**

Click the **Add** button, and then click **Restore public access**.

If the item is a container, you will be asked whether you want the change applied to sub-folders. To restore Public Access for items in the sub-folders, slide the **Apply to sub-folders** switch to the **On** position, and then click **Apply**, or click **Cancel** to restore the Public Access permission for only the current container.

## 9.2 Advanced permissions in the Permissions Explorer

The **Permissions** page allows you to manage the item usage Permissions for each Content Server object or container. Users with the Permissions Explorer usage privilege will see the **Permissions Explorer** button on the **Permissions** page and can perform more advanced permissions functions. This button launches the **Permissions Explorer** for the *parent container* of the object or container that was on the **Permissions** page. The Permissions Explorer provides more advanced permissions functionality.

**Notes**

- Although you launch the Permissions Explorer from the **Permissions** page for a *node*, the Permissions Explorer opens to show the *parent container* for the node at the top of the view. You can click the **Expand** button to see the parent container permissions. The view also lists the permissions for all the child items in that container allowing you to compare their permissions settings with each other and with their parent.
- The Permissions Explorer enables you to view and compare permissions for all items *within the context of the current parent container*.
- To edit permissions in the Permissions Explorer, you must have System Administrator privilege or *Edit permissions* for those nodes.

### What can I see in the Permissions Explorer?

**Simplified permissions view**

Provides an overview to support quick visual comparison of the permissions for each of the child objects within the container. In this view, each of the available Read, Write, and Full control permissions is represented with an indicator bar. If the permission is denied, the bar appears light grey. If a permission is granted, the bar appears dark grey.

**Tip:** For quick visual comparison, the permission indicators are colored to match the corresponding Read, Write, and Full control permissions in the **Custom permissions** dialog box. See “Add, change, or remove permissions for an item” on page 61.

To edit the permissions:

- For a few quick edits, you can use the **Simplified permissions view** that provides simplified permissions, which are pre-configured sets of the commonly used permission patterns. See “Editing permissions using Permissions Explorer” on page 66.

  **Notes**

  – You must expand the parent node to be able to edit.

  – Depending on their object type, you may not be able to edit some child items.

- For custom permission edits, you can switch to the **Custom permissions view**. See “Add, change, or remove permissions for an item” on page 61.

**Custom permissions view**

Provides an overview that facilitates more extensive editing of custom permissions for each of the child items within the container. In this view, each column of check boxes represents a individual permission, such as Read, Write, and Full control, while each row represents a user or a group. If a permission is granted, the check box is selected. If the permission is denied, the check box is cleared.

**Tip:** The permission columns are underlined with colors that match the corresponding Read, Write, and Full control permissions in the **Permission** dialog box. See “Add, change, or remove permissions for an item” on page 61.

### What can I do in Permissions Explorer?

**Add a user or a group**

To add a user or group, point to the node name, click the **Add** button ●●●, then click **Add users or groups**. In the **Add user or groups** dialog box, select the group, the users, and the permission levels that you want to assign, then click **Done**.

**Add an owner or owner group**

Do one of the following:

- If there is no owner and you want to add an owner, point to the node name, click the **Add** button ●●●, then click **Add owner**. In the **Add Owner** dialog box, select the owner, then click **Next**.
- If there is no owner group and you want to add an owner group, point to the node name, click the **Add** button ●●●, then click **Add owner**. In the **Add Owner group** dialog box, select the owner groups, then click **Next**.
- If there is no owner, nor owner group and you want to add an owner, point to the node name, click the **Add** button ●●●, then click **Add owner or owner group**. In the **Add Owner or owner group** dialog box, select the owner or owner group, then click **Next**.

Select the permission levels that you want to grant, click **Next**, and then click **Done**.

**Change an owner or owner group**

To change an owner, point to the row for that existing owner or owner group and click the **Change owner group** button. Type the name of the new owner group and click **Save**.

**Control what content and permissions you see**

You can control the content and permissions you see in the Permissions Explorer:

- Filter by the content that appears by facet.
- Show or hide the users, groups, or permissions.
- Sort the users and groups.

See “Control what is listed” on page 65.

**Edit permissions**

See “Editing permissions using Permissions Explorer” on page 66.

**Remove a user or group**

To remove a user or group, point to the user or group name and click the **Remove from list** button.

**Remove an owner**

To remove an owner, point to the owner name and click the **Remove owner** button .

**Remove public access**

To remove public access, point to the Public Access label and click the **Remove Public Access** button .

**Restore public access**

To restore public access, point to the node name, click the **Add** button , then click **Restore public access**.

**See the parent container permissions**

Click the **Expand** button to see the permissions for the parent container to compare with the permissions for the child items.

**See which node permissions differ from the parent**

By default, a child item inherits the same permissions as the parent container. In Permissions Explorer, a **Permissions differ from parent** icon marks any child item which has been granted permissions that differ from those inherited from the parent container.

**Switch the Permissions Explorer view**

To switch between the **Simplified Permissions View** and the **Custom Permissions View**, click the **Settings** button .

## 9.2.1 Control what is listed

### How can you control what is listed in Permissions Explorer?

**Filter by facet**

Click the **Show Filters** button to open or close the **Refine by** panel that enables you to filter contents. You can refine the results by application type, content type, document type, modified date, or owner. Additional filter options may be available, depending on how your administrator has configured the filter options.

To refine the results shown, select the check box for each type of content that you want to see, then click **Apply**.

**Hide or show users or groups**

Both the Simplified permissions view and the Custom permissions view list the AAccess Control Lists (ACLs) for each child item in the parent container.

To choose which ACLs that you want to hide or show, click the **Show selection / Hide selection** button for the **User/Group** column heading. Clear the check boxes for the users or groups that you want to hide, or select the check boxes for those that you want to show.

**Note:** Groups are listed alphabetically, followed by users listed alphabetically.

**Hide or show permission levels**

In the Simplified permissions view, to hide or show one or more permission level, click the **Hide/Show** button for the **Permissions** column heading. Clear the check boxes for the permission levels that you want to hide, or select the check boxes for those that you want to show.

**Hide or show individual custom permissions**

In the Custom permissions view, to click the **Hide/Show** button next to the individual permission column headings, then clear the check boxes for the individual permissions that you want to hide, or select the check boxes for those that you want to show.

**Sort the users or groups**

By default, both the Simplified Permissions View and the Custom Permissions View list the child items by name in ascending alphabetical order.

To change the direction of the alphabetical listing, click the **Name: Click to sort descending** button .

## 9.2.2 Editing permissions using Permissions Explorer

In addition to editing the permissions for an individual node from the **Permissions** page, you can also edit permissions in Permissions Explorer.

- **To edit permission levels on an indvdiual-node basis, use the Simplified Permissions View**

  The Simplified Permissions View facilitates quick comparisons of the permissions for each owner or group and also supports editing of the permissions, for one node at a time.

  To edit a permission for a user or group, in the **Permissions** column, click the link for the current permission level. In the **Permissions level** dialog box, click the permission level that you want to grant: **Read**, **Write**, **Full control**, or **Custom**. If you click **Custom**, the **Custom permissions** dialog box opens, allowing you to select check boxes for the custom permissions that you want, and then click **OK**.

- **To edit custom permissions for one or more nodes, use the Custom Permissions View**

  The Custom Permissions View allows you to quickly grant or deny custom permissions for both the parent container and each node within it. Select the check boxes that correspond to the custom permissions that you want to grant.

**Important**

–

To apply the permission change, click the **Save** button on the row for each user or group.

–

To cancel your changes, click the **Cancel** button .

**Important**

**Changes apply to all sub-items**

In Permissions Explorer, when you change a permission for a parent container, those permissions *automatically cascade down to all sub-items*, both child items and sub-containers. This behavior differs from Classic View where you can specify how you want the permissions to cascade to sub-items. In Classic View, a permission change, by default, only applies to that item.

**Dependencies**

Keep in mind that the permissions have dependencies due to how they nest within the *See* permission, such as follows:

- See
  - See Contents
  - Modify
    - Edit Attributes
    - Add Items
    - Reserve
    - Delete Versions
      - Delete
        - Edit Permissions

If you select the **Delete** check box, Content Server automatically selects the check boxes higher up the hierarchy that the *Delete* permissions depends on, such as **Delete Version**, **Modify**, **See Contents**, and **See**. You cannot delete something if you do not have permission to *See* it or *Modify* it.

Conversely, if you clear the **Modify** check box, Content Server automatically clears the check boxes lower in the hierarchy that depended on the *Modify* permission, such as **Edit Attributes**, **Add Items**, and so on.

Chapter 10

# Profiles

Each user’s personal information is shared with other users as part of their user profile. How the user profile information appears depends on the system configuration:

**Simple user profile**
By default, users will see a simplified panel of profile information that does not include any Pulse features. See “Simple User Profiles” on page 69.

**Full user profile**
If enabled, users can see a full page of profile information. The full profile supports Pulse functionality features, such as following users, activity feeds, privacy settings and chat. See “Full User Profiles” on page 70.

## 10.1 Simple User Profiles

By default, the system shows Simple User Profiles, so that all user profiles appear as a panel with some basic information such as name, manager, office location, email, phone, and mobile numbers. If a profile picture is not available, the default profile image appears.

### What can you do with simple user profiles?

**View a simple user profile**
Point to a user name or a user profile picture to open the profile panel for that user.

**View and edit your own simple user profile**
Click your own user name or profile picture, or, in the **Action Bar**, click the **Profile Menu** button to open your own profile panel. Click the **Edit** icon next to any field to change the information.

**View the information for the users in your reporting chain**
Click the Manager’s name or profile image to open their simple user profile. You can open the simple user profile for all users above you in your reporting chain.

**Note:** If you have multiple, linked simple user profiles open at the same time, you can only edit the central, active profile.

## 10.2 Full User Profiles

If your system is configured to show Full user profiles, each user will have a maximized profile page and a mini-profile. If extended Pulse is disabled, the maximized Full user profile will only include the following tabs: **General** , **Following**, **Followers**, **Activity**, and **Settings** . The **General** tab includes information such as title, department, office location, email, phone number, fax number, and time zone. The **Following**, **Followers**, **Activity**, and **Settings** tabs provide social information, such as lists of followers, the people being are following, the user activities, and the user privacy settings. If *extended* Pulse is enabled, the **General** tab will include extended profile information, such as status, job description, past positions, and profile links for Facebook, Linkedin, and Twitter..

### What can you do with full user profiles?

**View a mini-profile**

Point to a user name or a user profile picture to open the mini-profile for that user. See “Mini-profiles” on page 71.

**View the profile page for another user**

Click a user name or a user profile picture to open the profile page for that user. Or point to a user name or user profile picture and then click the **View profile** button . See “User profiles” on page 71.

**View and edit your own profile page**

Click your own user name or profile picture, or, in the **Action Bar**, click the **Profile Menu** button to open your own profile page. See “Your profile” on page 72.

**Start a chat with another user**

If chat is enabled, you will see the **Chat** icon or the **Chat** link on another users’s mini-profile or on their profile page. If Presence is enabled, you will see a presence icon, which will indicate whether that user is **Online**, **Offline**, **Busy**, or **Away**. See Presence icons on page 74. You can start a chat with another user by doing one of the following:

- Point to a user name or user profile picture to open the mini-profile, then click the **Chat** button .
- Click a user name or a user profile picture to open the profile page for that user. Or point to a user name or user profile picture and then click the **View profile** button . On the profile page, click the **Chat** link.

## 10.2.1 Mini-profiles

If you point to a user name or profile picture, the mini-profile for that user appears. Depending on how the system is configured, you can see the following information on the mini-profile:

- Profile picture
- User Name
- Email address
- Title
- Office location

#### What can you do on a mini-profile?

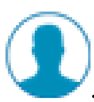
**Follow the user**
Start following a user.

**Unfollow the user**
Stop following a user who you are already following.

**View Profile**
View the full profile page for that user. See "User profiles" on page 71 and "Your profile" on page 72.

**Chat with the user**
If chat is enabled, you will see the **Chat** icon and can start a chat with that user. See "Chat with users" on page 74.

## 10.2.2 User profiles

You can open a user profile page by clicking the user name or user profile picture . For details about your own profile page, see "Your profile" on page 72.

#### What can you do on a profile page?

**See the profile information**
On the **General** tab, you can view the user information, such as their profile picture, user name, and group.

**Perform additional social collaboration tasks**
The Pulse module provides features, such as activity feeds, following, and commenting, that allow you to collaborate with your colleagues. If Pulse is enabled, you will see the **Followers** tab, the **Following** tab, and the **Activity** tab. You can also do the following:

- **See additional user information**

  On the **General** tab, you can see extended user information available, such as a link to their Linkedin profile, their manager's name, and their job description. These details correspond to the **General** and **Extended** information on the **Pulse Profile** page in the Classic View.

- **Follow / Unfollow the user**

  Start following a user or stop following a user who you are already following.

- **See who the user is following**

  On the **Following** tab, you can see the mini-profiles and activities of the people who the user is following.

- **See who is following the user**

  On the **Followers** tab, you can see the mini-profiles and activities of the people following the user.

- **See the activity for that user**

  The **Activity** tab lists the recent activities for the user.

- **See comments on an activity post**

  Expanding the **Activity** tab provides access to any comments made on a status post or on a content post.

## 10.2.3 Your profile

You can open your own profile page by clicking the **Profile Menu** button  in the **Action Bar** and then clicking your name. For details about other user profiles, see “User profiles” on page 71.

#### How can you personalize your own profile?

**Update your profile picture**
Upload a new profile image from your local system.

**Perform additional social collaboration tasks**
The Pulse module provides features, such as activity feeds, following, and commenting, that allow you to collaborate with your colleagues. If Pulse is enabled, your profile page will include the **Followers** tab, the **Following** tab, the **Activity** tab, and the **Settings** tab. You can also do the following:

- **Set your extended profile information**

  On the **General** tab, you can set your extended user information, corresponding to the information on your **Pulse Profile** page in the Classic View, such as a link to your Linkedin profile, your manager’s name, and your job description. Point to the information that you want to change, click the **Edit** button , make your changes, and then click **Update**.

- **Update your status**

  On the **General** tab, in the **My status** area, you can type a status update that can include emojis.

- **See who you are following**

  The **Following** tab shows the mini-profiles and activity feeds of the users who you are following.

  See "Mini-profiles" on page 71.

- **Follow / Unfollow a user**

  Point to the mini-profile of another user, and click the **Follow** button  to follow that user, or click the **Unfollow** button  to stop following a user who you are already following.

- **See your Followers**

  The **Followers** tab shows the mini-profiles and activities of the users who are following you. See "Mini-profiles" on page 71.

- **See your activities**

  The **Activity** tab shows the activity feed for *your* status updates and content updates.

  – Filter the activities list by selecting the types of activities that you want to see.

  – Add a comment to one of your status updates. See "Activity feed" on page 19.

- **Choose which notifications you will receive when activities related to you occur**

  On the **Settings** tag, choose which activities will trigger Content Server to send you a notification. These settings correspond to those on the **Pulse User Settings** page in the Classic View.

- **Choose your privacy settings**

  On the **Settings** tab, select the privacy level that you want for either **Privacy settings for status messages** or **Privacy settings for content messages**:

  – **Everyone**

    All users can see your updates.

  – **Only the People I Follow**

    Only your followers can see your updates.

  – **Only me**

    All your updates are only visible to you and are hidden from other users.

## 10.2.4 Chat with users

If chat is enabled, mini-profiles will show a **Chat** icon and profile pages will show a **Chat** link beneath the profile picture. If Presence is enabled, you will see a presence icon, which will indicate whether that user is **Online**, **Away**, **Busy**, **Offline**, or any of several other states, as shown in the Presence icons on page 74 table.

**Presence icons**

| | |
|---|---|
| | **Online**<br>User is signed in and available to chat. |
| | **Away / Out of office / Inactive**<br>User is signed in and not active but able to receive chat messages. |
| | **Busy/ Do not disturb / In a meeting / In a conference call / Inactive busy / In a call**<br>User is signed in and busy. While chat is still possible, the user prefers to avoid receiving chat messages. |
| | **Offline**<br>User is not signed in. |
| | **Unknown**<br>User status is unknown. |

You can start a chat with another user by clicking the **Chat** button on that user's mini-profile or by clicking the **Chat** link on that users's profile page.

**Note:** If using Firefox to sign in to Content Server, end users may need to do the following:

- When prompted to "Allow Plugin or Block", end users must enable the Microsoft Name Control Plugin and then refresh the page.
- If there is any issue with the Microsoft Name Control Plugin, when prompted, end users must enter their Skype for Business credentials.

Chapter 11

# Physical Objects

Physical Objects is a set of features used to store and manage *Physical Items* within Content Server. A *Physical Item* is a *virtual object* in Content Server that *represents* an actual object, such as a paper document or record, CD-ROM, or DVD. You can then use the Physical Item in Content Server to manage the lifecycle of the actual object. For example, you can borrow Physical Items, prepare listing reports, and generate and print labels to be placed on physical items, which you can then use to track inventory and manage space in storage facilities.

This help describes Physical Objects features that are available in the Smart View of Content Server. For information about features not currently available in Content Server Smart View, see the *Physical Objects User Online Help* in Content Server Classic View.

## 11.1 Physical Items metadata

A Physical Item's metadata is displayed on the **General** tab of an item's **Properties** page. The metadata fields that are displayed depend on whether the Physical Item is a non-container, container (such as a Folder), or a Physical Box, and on Physical Object System Settings.

| | |
|---|---|
| Created | Date and time that the Physical Item was created. |
| Created By | Log-in name of the user that created the Physical Item. |
| Modified | Date and time that the Physical Item was last updated. |
| Owned By | Log-in name of the current owner of the document. The user that creates the item is the initial owner, but ownership can be changed. |
| Item ID | Unique integer that identifies the item within Content Server. |
| Type | Possible Types are *Physical Item Container*, *Physical Item Box*, or *Physical Item*. |
| Home Location | The usual location for an item. |
| Current Location | The location of a borrowed item. |

| | |
|---|---|
| Unique ID | A unique identifier that you specify, or is automatically generated by Content Server, when a Physical Item is added. Depending on Physical Objects System Settings, this field may not be displayed. The Unique ID cannot be modified after a Physical Item is added. |
| Keywords | Search terms that could help locate a physical item in Content Server. |
| From/To Dates | For containers only, the date range for its contents. Depending on Physical Objects System Settings, these dates may be automatically updated based on the From and To dates of the contents. |
| Description | A text description of the item. |
| Box | The file path of the Box containing the Physical Item.. |
| Locator Type | Describes the type of storage where the Physical Item is located. For example, Shelf, Box, Storage unit. Depending on Physical Objects System Settings, this setting may be removed when an item is borrowed. |
| Reference Rate | A code that describes the frequency with which a box or storage locator is accessed. |
| Offsite Storage ID | This is a text field. |
| Box Client Type | Indicates the type of client, for example, internal or external. |
| Client | Log-in name of the user. |
| Temporary ID | This is a text field. |

### What can you do with Physical Objects metadata in Smart View?

**View metadata**

Click a Physical Item’s **Properties** button on the **Inline Action Bar**. Physical Items metadata appears on the **General** tab.

**Edit metadata inline**

If metadata can be modified, the **Edit** button appears when you hover over the field. To add or edit metadata, type directly into the field, or select an option from the available list.

**Note:** If you edit the **Home Location** for a physical item that has the same **Home Location** and **Current Location**, you are given the option to also update the **Current Location**. If you edit the **Home Location** for a container, the **Home Location** for its sub-items is updated and you are given the option to also update the **Current Location** for the container and for its sub-items. The **Current Location** is updated only for container or sub-items that have the same home and current locations before the update.

**Edit metadata for multiple items**
In Browse view or Search results, select the check box for each item that you want to update, and click **Update physical item metadata** on the **Action Bar**.

## 11.2 Add Physical Items

To add a **Physical Item**, click the **Add Item** icon + in a workspace or container. Type a unique name for the item, select a **Physical Item Type**, and populate any other required fields. Required fields are marked with an asterisk.

**Physical Item Types** are definitions that users associate to Physical Items, which enables users to identify the type of physical item that is being managed. In Smart View, you can add a Physical Item and specify properties for *existing* Physical Item Types.

## 11.3 Circulate Physical Items

Content Server allows you to track the circulation of Physical items within your organization. If the circulate functionality is enabled by your administrator and you have the required permissions, you can request, borrow, return, flag for pickup, or pass items on to other users. Circulating a Physical Item creates an electronic record that stores information such as the name of the person who borrowed the item, when it was borrowed, and when it will be returned.

**Note:** To circulate Physical Items, you need at least **See Contents** permissions on the item.

### Request items

You can *request to borrow* Physical Items for yourself, or on behalf of other users in your organization. A *request* notifies others that a user intends to borrow an item on a certain date, but has not yet borrowed it.

When you submit a request to borrow a Physical Item, a notification is sent to the specified Records Manager or Administrator for approval.

To request a Physical Item, select the check box for one or more items, and click **Circulate > Request** on the **Action Bar**.

### Borrow items

You can *borrow* Physical Items for yourself, or on behalf of other users in your organization. When you borrow Physical Items, you must complete the required fields on the Borrow physical item page. Required fields are marked with an asterisk.

If you borrow a Physical Item on behalf of another person, enter the user name of that person in the **Borrowed By** field and enter your user name in the **Obtained By** field.

To borrow a Physical Item, in Browse View or search results select the check box for one or more items, and click **Circulate > Borrow** on the **Action Bar**.

### Return, cancel, or pass physical items to other users

If you have a borrowed item, you can return the item, cancel the borrow, or pass the item on to another user.

Select the check box for one or more items, and click **Circulate > Return** on the **Action Bar**. In the **Action** list, select **Return**, **Cancel**, or **Pass**.

## 11.3.1 Physical Items tiles

Your administrator can make the **My requested physical items** and **My borrowed physical items** tiles available to you on the **Home** page or another location in Smart View. These tiles list your borrowed and requested Physical Items, and allow you to quickly perform related actions on those items.

#### What can you do on the My requested Physical Items tile?

This tile lists the Physical Items that you have requested to borrow.

**Cancel request**
: To cancel a **Request**, maximize the tile, select the check box for each item that you want to cancel, and click **Cancel Request**.

#### What can you do on the My borrowed items tile?

This tile lists all of the Physical Items that you have borrowed, or items other users have borrowed on your behalf.

**Acknowledge**
: When enabled, you are required to *acknowledge* that you have received an item when it is assigned or passed to you from the system or another user. If you fail to acknowledge that you have received the Physical Item, it will be sent back to the user who passed it to you.

  Select the check box for each item you have received, and then click **Acknowledge**.

**Flag for Pickup**
: *Flag for Pickup* means that you are finished with the item you borrowed, and are ready to return it. If the Records Manager enabled the functionality, notifications are sent to the specified email addresses when items are flagged for pickup.

  Select the check box for each item you are finished borrowing, then click **Flag for Pickup**.

Chapter 12

# Records Management

Records Management adds functionality to Content Server that enables you to manage documents and maintain records for those documents throughout their lifecycle.

This help describes Records Management features that are available in the Smart View of Content Server. For information about features not in the Smart View, see the *Records Management User Online Help* in Content Server Classic View.

## 12.1 RM Classifications

*Classifications* provide users with an alternative way of organizing, browsing, and searching Content Server items. When Classifications are assigned to items, such as Documents and Folders, users can then browse those Classifications and locate all items with that Classification assigned to it.

A **Records Management** Classification (RM Classification) is similar to a standard Classification, except that you apply RM Classifications to managed items, or items under control of **Records Management**.

Apply an RM Classification

**To apply an RM Classification to an item:**

1. Click the **Properties** button on the **Inline Action Bar**.
2. On the **Properties** page, click the **Add properties** button, and click **Apply Classification** or **Apply RM Classification**.
3. Navigate to the Classification or RM Classification that you want to apply to the item, and click the **Select** button.

**Note:** Alternatively, in Browse View or Search results, you can select the check box for each item that you want to apply a classification to and select **Apply Classification** on the **Action bar**.

**To apply an RM Classification when you add an item:**

**Note:** This procedure applies to Documents that have required metadata. If no fields are required, you must add the item first, and then apply the Classification.

1. Click **Document** on the **Add Item** menu, navigate to the item you want to add, and then click **Open**.

2. On the **Upload file** page, click the **Add properties** button, and then click **Apply RM Classification**.
3. On the **Select an RM Classification to apply** page, navigate to the RM Classification you want to apply to the item, and then click the **Select** button.
4. On the **Records Management** tab, provide any other required information, and then click **Upload**.

**To apply a Classification when you add a Folder:**

1. Click **Folder** on the **Add Item** menu.
2. Click the Folder's **Properties** button.
3. On the **Add Folder** page, click the **Add properties** button, and click **Apply Classification** or **Apply RM Classification**.
4. Navigate to the Classification or RM Classification that you want to apply to the Folder, and click **Select**.
5. On the **Records Management** tab, enter any required metadata in the fields, and then click **Upload**.

**Note:** You must click the **Properties** button *before* you click the **Upload** button to display the required Records Management fields (for Folders), otherwise an error will display. This error only occurs when the folder has an RM Classification applied, either as a default value or by inheriting it from the parent container.

## 12.2 RM metadata

The metadata for an item is displayed on the **Records Management** tab of the item's **Properties** page. Depending on a user's permissions, they can edit the metadata fields from the **Properties** page. If two users edit metadata fields on the **Properties** page at the same time, an alert displays for the user who submits their changes last. The message states that another user has made changes, and the page is refreshed with the latest data.

Some metadata fields on the **Records Management** tab are populated with information that is extracted from an item when you add it to Content Server, or when you apply an RM Classification to the item. For example, if you add an email, the sender, recipients, subject, CC and BCC, and date information is extracted from the email and put into the **Author or Originator**, **Addressee(s)**, **Subject**, **Other addressee(s)**, and **Record Date** fields.

Depending on how the Records Manager has configured the default settings, some or all of the following metadata fields are displayed and some may be required fields. The **Record Date**, **Status**, **Status Date**, and **Essential**, are always required fields.

| | |
|---|---|
| RM Classification | The RM Classification assigned to the item. |
| File Number | A unique identifier for the item. |
| Record Date | Often, this is the date that an item is added to Content Server. For an email item, the field is auto-populated with the sent date. |
| Record Type | For Document items only, this field displays the type of document as selected from a configured list of types, for example *Invoice* or *Sales Order*. |
| Status | Status of the item. The options for Status are defined by the Records Manager. |
| RSI | The Record Series Identifier that is assigned to the record. The RSI determines the retention and disposal rules for a record. |
| Status Date | The date when the record’s current status was set. |
| Received Date | Can be set manually when you add an item. For an email item, the field is auto-populated with the received date. |
| Essential | Indicates the Essential status of the record. If the Essential code assigned to an item is configured as a Vital Record, the Update Cycle Period and Next Review Date fields are required fields. |
| Update Cycle Period | Indicates the frequency that a record needs to be reviewed. |
| Last Review Date | The most recent date that the record was reviewed. |
| Next Review Date | Next scheduled review date for the record. |
| Official | Indicates whether the item is marked official. The official status can be toggled on or off using this button. |
| Storage Medium | The type of storage media available for this record, such as paper or electronic. |
| Accession | Accession code assigned to the item that is used for search, retrieval, and transfer purposes. |
| Subject | The information from the Subject field of an email item. |
| Author or Originator | This could be the owner of an item, or the sender of an email. |
| Addressee(s) | The email addresses of the recipients in an email item. |

| | |
|---|---|
| Other Addressee(s) | The email addresses of the recipients that are in the CC or BCC fields of an email item. |
| Originating Organization | You can use this field to enter the source of the record, such as the company name. |
| Records Officer | The Records Officer that is assigned to this record. This field cannot be edited from the Properties page. |
| Records Manager Group | The Records Manager Group that is assigned to the record. This field cannot be edited from the Properties page. |

**What can you do with Records Management metadata in Smart View?**

**View metadata**

Click the **View Record details** icon or the **View Official Record details** icon to view the Records Management metadata for an item.

The fields shown are based on Records Management System Settings, and are controlled by your administrator.

**Add and edit metadata inline**

On the Records Management tab of the Properties page, position the pointer over a field. If the field is editable, you can click the **Edit** button and type directly into the fields, or select options from the metadata lists.

If the item has sub-items (a Folder, for example), you can choose whether to apply the change to the current item only or the current item and its sub-items. Changing metadata inline adheres to permissions set up by the Administrator.

Fields that are required are marked with an asterisk, and must be populated before changes to the item can be saved. Required Records Management fields are enforced only when an RM Classification is applied, either when a default RM Classification is applied, or when inherited from the parent container.

## 12.3 RSI Schedules and Dispositions

A *Record Series Identifier*, or *RSI*, is a code that is assigned to records, and is then used to apply retention and disposal information to records. *RSI Schedules* work in conjunction with RSIs to help manage the lifecycle of records by performing specific actions on the records when they meet certain date or event criteria. These actions are known as *Dispositions*.

**Notes**

- RSIs and RSI Schedules are created in Classic View. For more information, see the *Records Management* section of the *OpenText Content Server User Online Help* in Classic View user online Help.

- In Smart View, you can view the RSI schedule details on the **Records Management** tab of the **Properties** page. Click the **View Details** button beside the RSI name.

### Disposition actions

When the date and/or event criteria (as specified by the RSI Schedule) is met, items with the RSI assigned to them will be dispositioned, or actioned, based on the process defined by the RSI Schedule:

The following Disposition actions that are available. The possible actions vary based on the item type and the date type selected.

- **None**, which does not define a default action process.
- **Delete Electronic Format**, which deletes the electronic format.
- **Destroy**, which destroys the items.
- **Export**, which exports the items.
- **Close**, which closes the items if they are RM Classification item types.
- **Change Status**, which changes the status of the items to a new status specified.
- **Mark Official**, which marks an item Official.
- **Finalize Record**, which marks an item Official and may perform other actions depending on the configured settings.
- **Make Rendition**, which makes a Rendition of the item based on rendition rules.
- **Update Storage Provider**, which marks the item to be evaluated again when RM Metadata included in the storage provider rules changes.
- **Purge Versions**, which destroys older versions but keeps the minimum number of versions specified.

## 12.3.1 Disposition and Accession Searches

A *Disposition Search* returns a list of items that meet the criteria specified by *RSI Schedules*. For example, you may want to find all records that are scheduled to be destroyed by a certain date.

An *Accession Search* returns a list of items that are assigned a specific accession code.

Records Managers create the searches, assign reviewers, select custom columns to display, and schedule or start the searches in Classic View. In Smart View, assigned reviewers can locate the search results on the Home page **My Assignments** tile.

Search results are identified by the Disposition Search icon or the Accession Search icon.

## 12.3.2 Disposition and Accession Reviews

Records Managers can assign specific users to review records in a Disposition or Accession Search. The assigned reviewers can approve or reject items for processing and optionally, provide comments on their review decisions. The comments are captured in the audit trail, and the **Review Comments** icon is displayed beside the item.

When the review is finished, the items can move forward in the disposition process.

**To complete a Review:**

1. From the **My Assignments** tile, click the name of the Disposition or Accession Search to open the search results.
2. Optionally, filter the results by clicking the search icon in the column header for **Name**, **Review Decision**, or **Action**. Type the first few characters to find a search term.
3. If necessary, change the default **Review decision** for one or more of the items.

   **Note:** If the Records Manager selected *Pending* as the default Review decision, reviewers must explicitly change the review decision to **Approved** before the action can be performed.

   a. Select the check box for each item that you want to change, and click **Change review decision**.
   b. In the **Change review decision** window, select the **Pending**, **Approve**, or **Reject** radio button.
   c. Optionally, add a comment, and click **Save**.
4. If necessary, change the default **Action** for one or more of the items.
   a. Select the check box for each item that you want to change, and click **Change actions**.
   b. In the Change action window, choose an action from the **Action** list. Optionally, choose a new status for the item from the **Status** list.
   c. Click **Save**.
5. With appropriate permissions, you can perform actions on items. Do one of the following:
   - Select the check box for the items that you want to process, and click **Perform actions**. The approved items that you select are processed.
   - Click **Perform actions** in the header bar. All approved items are processed.
6. When you have finished reviewing or processing the items in the search results, click **Finish review** in the header bar and click **Yes** to confirm that you are finished. The review decisions are saved and your review is completed. No

additional changes can be made and the search is removed from the **My Assignments** tile.

### 12.3.3 Perform Disposition Actions

You can perform disposition actions for items in a disposition search that have a review decision of **Approved**. You cannot perform Disposition Actions for records that have a Review decision of **Pending** or **Rejected**.

In addition to Disposition Actions, you can perform other actions from the Disposition Search page such as, **Apply Accession**, **Change actions**, and **Comment**.

**To Perform Disposition actions:**

1. From the **My Assignments** tile, click the Disposition Search name.
2. On the **Disposition Search** page, select the check box for each item that you want to modify, and select any of the following options from the **Action Bar**:

| | |
|---|---|
| **Apply accession** | Apply an accession code to selected items. Accession codes assigned to items are used for search, retrieval, and transfer purposes. |
| **Change actions** | Choose a new action for selected items. |
| **Change review decision** | Change the current review decision for selected items to **Pending**, **Approve**, or **Reject**. Optionally, add a comment that will be stored in the audit trail. |
| **Perform actions** | Perform disposition actions for selected items. All items that have a review decision of **Approved** will be processed according to the disposition action specified, including items marked for destruction. This action cannot be undone.<br><br>**Note:** Instead of selecting check boxes, you can click the **Perform Actions** button to perform the disposition actions for *all* **Approved** items in the Disposition Search. |
| **Comment** | Provide a disposition review comment for selected items. |
| **Move** | Move selected items to a new location. The item’s location is changed, but the item remains in the Disposition Search list. |

| | |
|---|---|
| **Apply hold** | Apply a hold to selected items. Depending on the **Disposition Settings**, items with a hold applied may not be returned in a disposition search. Items with a hold applied cannot be destroyed. |
| **Collect** | Add the selected items to an existing **Collection**. |

**Note:** The **Move**, **Apply Hold**, and **Collect** options are available only if enabled in the **Disposition Settings**.

## 12.4 Finalize records

Finalizing a record marks it *official* and, depending on the settings that your Records Manager configured, may perform additional actions such as purging versions, updating the Record Date, updating Status, or making a Rendition. When a record is marked official, the **Official** icon is displayed. You can click the **Official** icon to view the **Properties** page.

To remove an item's official marking, you can toggle the **Official** button on the **Records Management** tab of the **Properties** page.

**Note:** Depending on the Records Management Settings, you may not be able to finalize records that are reserved.

### How can you finalize a record in Smart View?

**From the Inline Action Bar**
Click **Finalize record** on the item's **Inline Action Bar**, and then click **Finalize**. If the item is a container, an additional option allows you to apply the changes to the item and its sub-items.

**From Browse View, Favorites, or Search results for multiple items**
Select the check box for each item that you want to finalize and click **Finalize record** on the **Action Bar**.

**Notes**

- The **Finalize record** action must be enabled as a multi-select action in Records Management default settings.
- The **Finalize record** option is not available if you select items that cannot be finalized. For example, items already marked official or items that do not have an RM Classification.

## 12.5 Cross-References

Cross-references are codes created in Classic View, that enable you to associate, or link, managed items and specify details about the relationship between them.

All Cross-reference metadata, including any associated Holds, is displayed in read-only mode on the item's Properties page. Users must have the appropriate Functional Access permissions to view Cross-reference details, and to assign or remove Cross-references.

### What can you do with Cross-references in Smart View?

All actions for Cross-references are managed on the item's **Properties** page. To access it, click the **Properties** button on the **Inline Action Bar**.

**View Cross-references**

On the **Properties** page, click the **Command** menu for the **Properties** tab, and choose **Cross-references**.

**Assign Cross-reference**

On the **Properties** page, click the item's **Command** menu, and choose **Assign cross-reference**. Click the **Content Server Object** field and navigate to the item that you want to cross reference. Select the **Cross-reference Type** and click **Assign**.

To assign a cross-reference to multiple items, select the check box for each item and click **Assign cross-reference** on the **Action Bar**.

You can also assign a cross-reference to an item from Disposition Search results, by accessing the **Properties** page and clicking the **Command** menu for the item.

**Note:** If enabled by your administrator, Cross-references can be used to indicate that the document is a version of the original. To assign a Cross-reference as a Record Version, toggle the **Record Version** indicator to *on*, which assigns a specific Cross-reference Type to the document. This Cross-reference Type is configured by your administrator and cannot be changed.

**Remove Cross-references**

On the **Properties** page, click the **Command** menu for the **Properties** tab, and choose **Cross-references. S**. Select the check box for each item you want the Cross-reference removed from, then click **Remove** and confirm.

## 12.6 Holds

Holds are applied to managed items to ensure that the items are not deleted.

Holds are viewed and managed in the **Holds** area of the **Properties** page. You can access the **Holds** page by clicking the **Properties** button, and then clicking **Holds** on the Properties **Command** menu. This option only appears for users with sufficient Functional Access permissions.

The **Holds** page lists active and inactive Holds for the item, including Holds related metadata. Items that have an *active Hold* applied cannot be deleted.

#### What can you do with Holds in Smart View?

**View Holds**
From the **Properties** page, click **Holds** on the Properties **Command** menu.

**Apply Hold**
To apply a hold to multiple items from the Browse View, Favorites, or Search results, select the check box for each item that you want to apply a hold to, and select **Apply hold** from the Action bar.

For individual records, on the **Properties** page, click **Apply hold** on the record **Command** menu, select a hold, then click **Apply**.

**Remove Holds**
To remove a Hold from multiple records from the Browse View, Favorites, or Search results, select the check box for each item that you want to remove the hold from, and select **Remove hold** from the Action bar.

For individual records, on the **Properties** page, click **Holds** on the Properties **Command** menu, select one or more Holds, click **Remove**, and then click **Yes** to confirm.

Chapter 13

# Reminders

A Reminder is a scheduled action that sends automated email messages at specified times. You can use Reminders to send or receive alerts and manage the status of upcoming action items, such as renewals and cancellations, required payments, and product shipments.

**Note:** “Personal” reminder types that are set to **Activate Immediately** will, by default, escalate to the **Current User**, and an email may be sent to the escalation user as configured.

If you have the correct permissions, you can add a Reminder, defining parameters such as priority (*Low*, *Medium*, and *High*), activation date, due date, and assignees.

### Reminder states

- **Open**

  A Reminder begins in the *Open* state as soon as it is assigned to a Content Server item.

  The exceptions are reminder types that are set to **Activate Immediately** and escalate to the **Current User**. These reminders, by default, begin in the *Active* state.

- **Active**

  A Reminder achieves the *Active* state when it reaches its activation date, which triggers depending on the defined due date and activation rule.

  The reminder types that are set to set to **Activate Immediately** and escalate to the **Current User** will immediately start in the *Active* state.

- **In Progress**

  A Reminder achieves the *In Progress* state after one of the Reminder assignees or a user with *Modify* permission for the associated Content Server item clicks **Start Progress**.

- **Complete**

  A Reminder achieves the *Complete* state after one of Reminder assignees or a user with *Modify* permission for the associated Content Server item clicks **Complete**.

## 13.1 Add a Reminder

Depending on your permissions and the configuration of your system, you can add a Reminder to items such as Documents and Folders. Your administrator determines which items can be assigned a Reminder.

To add a Reminder to an item, click the **More actions** button on the **Inline Action Bar**, and then click **Add reminder**. To view all settings for the Reminder, click the **Maximize view** button on the **Add Reminder** dialog box.

> **Important**
> For a Reminder, the maximized view for the Reminder shows all the available settings, while the minimized view only shows a subset of the available settings.

After you make your changes, click **Save**. Click **Cancel** to exit without creating the Reminder.

#### What settings can you specify for a Reminder?

**Reminder client**
Select the Reminder Client that contains the Reminder type you want to add.

> **Notes**
>
> - Any user with the correct permissions can create Reminder clients and Reminder types in Classic View.
> - The **Reminder client** list only appears if you have permission to access more than one Reminder Client.

**Reminder type**
Select the option that best describes the reason for the Reminder.

> **Note:** Any user with the correct permissions can create Reminder clients and Reminder types in Classic View.

**Priority**
Select either a **High**, **Medium**, or **Low** priority.

**Due**
Depending on the selection of reminder client or reminder type, this may be set to **Immediately**, or you may be able to set the due date for the reminder.

**Description**
Enter additional information about the Reminder.

**Assignee**
To assign the Reminder to someone other than yourself, start typing the name of the user or group in the **Assignee** box, then select the name from the list.

**Schedule**

- To set a specific due date, in the **Due date** list, click **Due on**, and then select a date.
- To set a relative due date, in the **Due date** list, click **Due in**, and then select a number and a time period. For example, select **3 Weeks(s)**.
- To set a periodic due date, turn on the **Recurring** switch, enter a **Start date** and **End date** for the periodic due date settings, and then do one of the following:
  - To select a predefined frequency, ensure the **Predefined** switch is turned on, and then select a value in the **Repeat** list. For example, select **Every week**.
  - To specify a Reminder frequency that is not predefined, turn off the **Predefined** switch, and then select values in the **Repeat** and **On** lists. For example, select **Repeat Weekly On Monday**.

**Activation alert**

Specify at what time, relative to the due date, the Reminder becomes active and sends an email notification.

**Note:** This option is unavailable for Reminder types that are set to set to **Activate Immediately**.

**Escalation alert**

To enable the escalation, turn on the **Enabled** switch. Use the **Send in** box to specify when the email must be sent relative to the due date.

To specify the recipient of the escalation, start typing the name of the user in the **Send to** box, then select the name from the list.

**Note:** You can only specify escalation settings for a Reminder if the administrator enables this option.

## 13.2 Reminders in Browse View

In Browse View, each Content Server item that has a Reminder assigned, shows an inline **Reminder** icon .

**Note:** Each Content Server item can have one or more associated Reminders on the same or different due dates.

### What can you do with a Reminder in Browse View?

**Open a Reminder**

Click the **Reminder** button to open the Reminder view, which shows the status, due date, description, and the alphabetically-first assignee.

**Notes**

- If the Content Server item has multiple Reminders, click the **Next** button or the **Previous** button to move between the Reminders.
- If the Reminder is overdue and has been configured to support escalations, the escalation recipient will receive an email notifying them of the status of the Reminder.

**Start progress on a Reminder**

Open the Reminder view, then click **Start**. The Reminder status changes to *In progress*.

**Note:** You can skip the **Start** step and go directly to **Complete**. See Complete a Reminder on page 92.

**Edit a Reminder**

Open the Reminder view, then click the **Maximize view** button . For more information on Reminder settings, see “Add a Reminder” on page 90.

**Complete a Reminder**

Open the Reminder view, then click **Complete**.

The Reminder status will change to *Completed* and become read-only. When the Browse View refreshes, the Reminder icon will clear.

**Note:** You can skip the **Start** step and go directly to **Complete**.

**Open a document for editing**

For a Reminder associated with a document, open the Reminder view, then point to the document icon and click the **Edit** button .

## 13.3 Reminders in your assignments

If you have an Active Reminder assigned to you, it will appear on your **My Assignments** tile. See Reminder states on page 89.

### What can you do with a Reminder in your assignments?

**Open or Edit a Reminder**
: On the My Assignments tile, click the **Reminder** link to open the Reminder. You might be able to edit some settings for the Reminder. For more information on Reminder settings, see “Add a Reminder” on page 90.

**Search for a Reminder**
: Click the **Search** button, then type the Workflow Step, Task name, or Reminder name in the field.

**Open a document for editing**
: For a Reminder associated with a document, open the Reminder view, then point to the document icon and click the **Edit** button .

Chapter 14

# Search

Content Server's searching capabilities provide a way to quickly locate items stored in Content Server. Searches can be as basic as locating a document by its name within a folder, or advanced, such as returning a list of documents in the system that share a common attribute or piece of metadata.

**Note:** Some search capabilities are available by default, but can be configured by your administrator. More advanced searching capabilities must be enabled by your administrator. Since search options can be customized, the options that appear in your workspace may differ from the ones described in this help.

## 14.1 Basic search options

You can perform a basic search from anywhere you see the **Search** button. The **Search** button appears in most containers and workspaces and allows you to find all items that contain the keyword you specify.

**To search by keyword:**

1. Click the **Search** button, type the keyword by which you want to search, and then press **ENTER**.

   **Note:** By default, the Search uses the **Search from here** Slice, which means the current container and its contents are searched. If additional Search Slices are available, you can select them from the **Search** field's **Command** menu to refine the scope of your search.

2. To further refine your search results by application type, item type, location, or other metadata, click the **Filters** button, and then click the link for the criteria you want used to narrow the search results.

# 14.2 Advanced search options

In addition to the basic search option that appears throughout Content Server, additional **Search** tiles may be available. Optional search widgets are created by your administrator, and enable you to search for items using keywords and then narrowing those results using filter options within the widget.

or any available *Search Slices*.

The search results that display within a widget depend on what *Search Slices* or *Search Queries* were selected when your administrator set up the additional search widgets. A Search Query is simply a set of criteria used to search for items in Content Server. Basic queries can contain keywords, a combination of keywords, and many other types of criteria. For example, a Search Query might be set up to find all documents and folders that were added to the Enterprise Workspace by a specific group of user. A *Search Slice* is a piece – or “slice” – of information in Content Server used to narrow down the type of information being searched. It can be metadata, such as the creation date or full text, a collection, time period, or a workspace.

**Note:** Search Queries and Search Slices can only be created in Content Server Classic View.

## 14.2.1 Search Results widget

The **Search Results** widget displays a list of objects found by a full-text Search Query and provides tools to narrow down the list of results.

## 14.2.2 Custom View Search widget

The Custom View Search widget uses a saved Search Query to return a list of results based on the search parameters in the query. Queries can be set up to search for system attributes, keywords, categories, item type, or other available search attributes. The Custom View Search widget provides users with quick access to a pre-configured search.

You frequently need to find items that are added to Content Server by members of the *Human Resources* group. Your administrator sets up a Custom View Search widget titled *HR Created Items*. Now you can simply open the widget, modify any of the available search criteria, and then click the **Search** button to run a real-time search.

After you click the **Search** button, the **Search Results** page lists all items that met the Search criteria you specified. On the **Search Results** page, you can use the filtering options to narrow down the search results, and perform basic operations on the items in the list using the **Action Bar** or **Inline Action Bar**.

Chapter 15

# Security Clearance

Security Clearance consists of two main components: *Security Clearance Levels* and *Supplemental Markings*. These components enable you to set how users can interact with objects in Content Server.

Security Clearance Levels are implemented by assigning a Security Clearance Level to objects and users. These levels provide access to individual objects. The levels are also used to filter searches and provide users with lists that only include items they can see, based on their assigned Security Clearance Level.

Supplemental Markings are implemented to provide users access to the metadata of individual objects. Supplemental Marks are also used to filter searches and provide users with lists that only include the items they can see, based on their assigned Supplemental Marking.

This help describes Security Clearance features that are available in the Smart View of Content Server. For information about features not in Content Server Smart View, see the *Security Clearance User Online Help* in Content Server Classic View.

## 15.1 View Security Clearance metadata

You can view Security Clearance Levels and Supplemental Markings assigned to an item on the **Security Clearance** tab of the **Properties** page.

**Note:** If the item type is not a supported object type for Security Clearance control, the **Security Clearance** tab is not shown.

## 15.2 Assign or edit Supplemental Markings and Security Clearance Levels

You can assign Security Clearance Levels and Supplemental Markings when you create an item. Security Clearance Levels and Supplemental Markings fields will display on the **Add Item** page if they are assigned to a user's profile.

The **Security Clearance Levels** and **Supplemental Markings** fields can be edited on the **Security Clearance** tab of the **Properties** page, as long as the user has appropriate permissions, or belongs to the Security Officers group.

**Note:** If Security Clearance Levels or Supplemental Markings are required, an asterisk appears beside the required field. Required fields must be completed prior to adding the item. Required fields cannot be removed. You can toggle the **Only required fields** button on or off to show only those fields that are required.

If you are editing Security Clearance metadata for a container with sub-items (such as a Folder), an option appears that allows you to apply the change to the sub-items. The following options determine how sub-items are handled:

### Supplemental Markings

- **Ignore**, which does not update the Supplemental Marking of a child object
- **Merge**, which will merge the Supplemental Markings of the parent and child object
- **Replace**, which will replace the Supplemental Markings currently applied to the child object with those of the parent object

### Security Clearance Levels

- **Ignore**, which does not update the Security Clearance Level of a child object
- **Downgrade**, which downgrades the Security Clearance Level of the sub-item to that of the parent object
- **Upgrade**, which upgrades the Security Clearance Level of the sub-item to that of the parent object
- **Upgrade and Downgrade**, which sets the sub-item Security Clearance Level to that of the parent object

### How can you assign or change Supplemental Markings and Security Clearance Levels?

**For existing items**

For a single item, click the **Properties** button on the **Inline Action Bar**, and click the **Security Clearance** tab. Position the pointer over the Security Clearance field and click the **Edit** button .

For multiple items, select the check box for each item and click **Security clearance** in the **Action Bar**. In the Security clearance window, click one of the options and assign or change the settings as needed.

**When adding a Folder**

Click **Folder** on the **Add Item** menu, type a name for the folder, and then click the **Properties** button. In the **Add Folder** window, select a Security Clearance Level and Supplemental Marking from the lists in the **Security Clearance** section, and click **Add**.

**When adding a Physical Item**

Click **Physical Item** on the **Add Item** menu. In the **Add Physical Item** window, type a name for the item and select an option from the **Physical Item Types** list. Select a Security Clearance Level and Supplemental Marking from the lists on the **Security Clearance** tab, and click **Add**.

## Chapter 16

# Share items to OpenText™ Core Share

OpenText™ Core Share is a Cloud-based information management and collaboration application. If your organization uses Core Share and grants you permission, you can share Content Server Folders, Documents, and Emails externally to Core Share. You can collaborate on these shared items with other users, including people outside of your organization.

**Note:** Before you can share items, your organization must set up a Core Share tenancy and give you the ability to create an account. Contact your administrator for more information about whether you are able to share Documents externally.

## 16.1 Share Documents, Emails, and Folders to Core Share

You can share Content Server Documents, Emails, and Folders to Core Share. If you share a Folder, you also share every Document, Email, and Folder that is inside the Folder. See “Shared Documents and Emails” on page 102 and “Shared Folders” on page 102.

**What do I require to share an item to Core Share?**

**A Core Share account**
If you do not have a Core Share account, contact your administrator.

**Edit Permissions permission for the item in Content Server**
If the item is a Folder, you also require **Edit Permissions** permission on all Documents and Folders in the Folder.

**Membership in the following usage privilege: Content Sharing Operation - Share items with OpenText Core**
Your administrator must assign this usage privilege to you.

When you share an item to Core Share, you invite other users to participate in the share. The invitees receive a notification email with a link to the shared item. If the invitees do not already have Core Share accounts, they can create them when they follow the link.

You can also share items to Core Share groups. Every member of the group receives an email notification and is given access to the shared item.

**Notes**

- Your administrator can restrict sharing to specific locations in Content Server.

- You cannot share a Folder that already contains shared items.
- Your administrator can restrict sharing to Core Share groups and prevent sharing to individual users.

In Core Share, the shared item is stored in a special folder in your Core Share workspace. By default, this folder is called **My Content Server Items**, but your administrator can choose a different name. For the people you invite, the share is displayed in their list of shared items in Core Share.

After you share an item, an icon identifies its sharing state in Content Server.

### What icons identify shared items in Content Server?

| | |
|---|---|
| | The item is synced and up-to-date in both applications. |
| | The item is in a pending state. For example, it could be involved in an ongoing sync process that has not completed yet. See "Shared item synchronization" on page 106. |
| | The item is in an error state. See "Resolve sync errors" on page 107. |

The tooltips for the icons indicate the share owner and the reason for the error state, if one exists.

### To share an item to Core Share:

1. Select the check box for the Document, Email, or Folder.

   **Tip:** You can select multiple Documents, Emails, or Folders if you want to share them with the same group of invitees.

2. In the **Action Bar**, click the **Show more** button for the **Share** button, and then click **Initiate Core Share**.

   **Tip:** You can also share an item by clicking the **Share** button in the **Inline Action Bar**, and then clicking **Initiate Core Share**.

3. If you are prompted, enter your user name and password to sign in to Core Share. By default, the email address associated with your Content Server user account is entered in the user name box.

4. In the **Share** dialog box, do one or both of the following to add invitees to the **Invite** box:

   **Enter user names, group names, or email addresses**
   Enter the full Core Share user or group name, or the full email address of each person you want to invite. Use a semi-colon (;) to separate multiple

names or addresses. Press **ENTER** when you are finished entering names or addresses.

**Search for a user or group**
Enter the starting characters of the group or user's Core Share name, and then click the name when it is displayed.

**Note:** If your administrator only allows sharing to Core Share groups, you cannot enter individual email addresses or user names in the **Invite** box.

5. Optional Enter a message for the invitees in the **Message** box. This message is included in the email invitation that is sent to the invitees.

   **Note:** The email invitation includes a link to the shared item in Core Share.

6. Optional To change an invitee's role, point to the invitee's name, and then click the **Select Role** button .

   **Note:** Your administrator can restrict which Core Share roles are available to assign. If you are a content sharing administrator, you can select all available roles regardless of any restrictions imposed by your administrator. See "Content sharing administrators" on page 105.

7. Optional To remove an invitee from the list, point to the invitee's name, and then click the **Remove Invitee** button .

8. Optional If your administrator has enabled the ability to assign a user or group as coordinator of the share, do the following:

   a. Click **Manage Coordinators**.

   b. In the **Manage OpenText share coordinators** box, enter the starting characters of the group or user's Content Server name.

   c. Click the name when it is displayed.

   See "Share coordinators " on page 105.

   **Notes**

   - Your administrator can disable the ability to assign share coordinators. By default, when you share an item you are the coordinator.
   - To remove a coordinator from the list, point to the coordinator's name, and then click the **Remove Coordinator** button . You cannot remove a coordinator from the list if only one name is listed.

9. Click **Share**.

**Notes**

- Your administrator can prevent you from sharing a Folder that contains more than a specified number of items. By default, you cannot share a Folder that contains more than 500 items.
- If the name of a shared item conflicts with another shared item in the same location, the item is automatically renamed by appending a number in parentheses to the name, starting at `(2)`. As well, if a shared Document does not have a file extension in its Content Server name, the Document is renamed to include the appropriate extension. For example, if you share a Content Server Excel Document named `Budget`, the Document is renamed to `Budget.xslx`. If an item named `Budget.xslx` already exists in the shared location in Core Share, the Document is renamed to `Budget(2).xslx`.

### 16.1.1 Shared Documents and Emails

You can perform all standard operations on a shared Document or Email that you have permissions to undertake in Content Server or Core Share. For example, you can reserve, view, edit, rename, delete, or add versions to a shared Document, and you can view, rename, or delete a shared Email.

Changes you make to a shared Document or Email, such as adding a version to a Document or renaming an Email, are automatically synced between applications. See “Shared item synchronization” on page 106.

Your ability to move shared Documents and Emails in Content Server is restricted. See “Move or copy shared items in Content Server” on page 103.

If you reserve or lock a shared Document or Email in one application, it is also reserved or locked in the other. Unreserving or unlocking the Document or Email in one application also causes it to be unreserved or unlocked in the other.

**Note:** If a shared Document or Email is in a pending sync state, you cannot edit it.

### 16.1.2 Shared Folders

When you share a folder, all the Documents, Emails, and Folders that are inside a shared Folder are shared as well. All share participants can access the contents of the Folder in Core Share, according to the roles you assign when you invite the participants to the share.

You can perform all standard operations on a shared Folder that you have permissions to undertake in Content Server or Core Share. For example, you can rename or delete a shared Folder. Changes you make to a shared Folder, such as renaming the Folder, are automatically synced between applications. See “Shared item synchronization” on page 106.

If you are browsing a shared Folder in Content Server, the Action Bar displays an icon next the Folder name that indicates its sharing status.

Your ability to move shared Folders in Content Server is restricted. See “Move or copy shared items in Content Server” on page 103.

If you add Documents, Emails, or Folders to a shared Folder, those Documents or Folders are shared as well.

**Notes**

- Only Documents and Folders inside a shared Folder are shared to Core Share. Other items, such as Emails or Projects, are not shared.
- A shared Folder displays the pending icon as long as one or more shared items inside it are pending.
- You cannot share a Folder that contains shared items.

## 16.1.3 Move or copy shared items in Content Server

Your ability to move shared items in Content Server is restricted. The following actions involving shared items are not permitted in Content Server:

- Moving a shared Document, Email, or Folder to a location inside a shared Folder.
- Moving a shared Document, Email, or Folder, or a non-shared Folder that contains shared items, to a location where sharing is not allowed.
- Moving a shared sub-item (a Document, Email, or Folder that is shared because it is inside a shared Folder).
- Moving a non-shared Folder that contains shared items to a location inside a shared Folder.

For example, you can move a shared Folder to a non-shared Folder in Content Server, as long as the destination Folder is in a location where sharing is permitted. The moved Folder remains shared. However, you cannot move a shared Folder to a location inside another shared Folder.

You can copy shared items to any location that permits the copy action. If you copy shared items to a shared Folder, the copied items become shared sub-items inside the shared Folder. If you copy shared items to a non-shared location, the copied items become non-shared as well.

**Note:** You can also move or copy non-shared items to a shared Folder. The moved or copied items become shared sub-items inside the shared Folder.

### 16.1.4 Audit log for shared items

Your administrator can enable special audit interests related to sharing. The audit interests can include activities such as sharing an item, stopping a share, opening or downloading a shared item in Core Share, and adding a version to a shared item.

In some cases, events in the audit log refer to the `Content Sharing Service` as performing an action on behalf of a user. The `Content Sharing Service` is an internal system account that is used to manage the sync of items between Core Share and Content Server.

For example, if Core Share user `jsmith@acme.com` adds a version to a shared Document in Core Share, the `Version added` audit entry for the Document in Content Server would display the following in the **User** field:

```
Content Sharing Service on behalf of OTCore:jsmith@acme.com
```

### 16.1.5 Records Management restrictions on sharing items

If Records Management is enabled, the following restrictions apply to items you have shared or are attempting to share:

- If a shared item is marked Official in Content Server, it is locked in Core Share and cannot be modified in Core Share. Changes made to an item marked Official in Content Server continue to be synced to Core Share.
- Your administrator can configure Content Server to prevent items from being shared if they have been assigned a specific Security Clearance level or supplemental marking. If the Security Clearance level or supplemental marking is applied to an item that is already shared, the item is automatically unshared.

## 16.2 Manage shares

You must be a share coordinator or a content sharing administrator to manage a shared item. To manage a shared item, select the check box for the item, click the **Show more** button for the **Share** button in the **Action Bar**, and then click **Manage share**. Use the **Manage share** dialog box to add or remove invitees, change permissions, or stop sharing. See “Share Documents, Emails, and Folders to Core Share” on page 99 and “Stop sharing” on page 108.

**Notes**

- Only invitees that you add to the share will receive an email notification. Invitees whose permissions you change or whom you remove from the share do not receive an email notification.
- You can also manage a share by clicking the **Share** button in the **Inline Action Bar**, and then clicking **Manage share**.

### 16.2.1 Share coordinators

Each shared item in Content Server has a coordinator. Share coordinators can manage the share, stop sharing, and resolve problems with the share in Content Server.

By default, when you share an item you are the item's share coordinator. If your administrator enables it, you can assign other Content Server users or groups to be the coordinator instead of you. Only share coordinators and content sharing administrators are able to manage the share, stop sharing it, or resolve problems for it.

**Notes**

- Your administrator can disable the ability to assign share coordinators.
- You can only assign users to be share coordinators if they belong to the **Content Sharing Operation - Share Coordinator** usage privilege. Share coordinators also require Core Share accounts.

### 16.2.2 Content sharing administrators

If your administrator adds you to the Content Sharing administration usage privilege, you become a content sharing administrator.

#### What can I do as a content sharing administrator?

- Manage and stop sharing for all shared items you have permission to access, even if you did not share the items. You can do this using the standard sharing commands. See "Manage shares" on page 104 and "Stop sharing" on page 108.
- Assign any role to a participant, even if the list of available roles is restricted on the Content Sharing administration pages.
- Access the Content Sharing administration pages. For more information, see *OpenText Content Server - Content Sharing (LLESEFS-AGD)*.
- Apply the **Retry synchronization** command on all shared items in an error state that you have permission to access. See "Resolve sync errors" on page 107.

If you are a Content Sharing administrator, you can also work with the **Manage Shares** tile if your administrator makes it available to you.

#### What tabs can I view on the Manage Shares tile?

**Shared items in an error state**
A list of all shared items that are in an error state. The tile includes the reason for the error and the time that it happened. You can use the **Retry synchronization** command on these items to attempt to resolve the error.

**All shares**

A list of all the shared Documents, Emails, and root Folders in that you have permission to access. The tile includes the share creator and the date the item was shared on.

## 16.3 Shared item synchronization

The synchronization, or sync, process keeps shared items in the same state in both Content Server and Core Share. Whenever an item is updated in one application, a sync is performed to ensure that the item is updated in the other application as well.

While an item is in the process of being synced, it displays the pending icon in Content Server. For example, if you add items to a Folder, it might take some time for all the items to be synced to the other application. In this case, the Folder displays the pending icon until it is fully synced.

**Notes**

- Core Share does not display a pending icon for items being synced.
- For items that are first added to Core Share and then synced to Content Server, the owner of the item in Content Server is the internal system account that manages syncs between the applications.

### 16.3.1 Actions that trigger a sync

Performing one of the following actions triggers a sync between Content Server and Core Share:

- Adding a draft or a version to a shared Document.
- Renaming a shared Folder, Document, or Email.
- Deleting a shared Folder, Document, or Email.
- Adding Documents, Emails, or Folders to a shared Folder.
- Locking or reserving a shared Document.
- Unlocking or unreserving a shared Document.

For example, if you add a version to a shared Document in Core Share, a sync process is run to ensure that the version is also added to the Document in Content Server. If you rename a shared Document in Content Server, the Document is renamed in Core Share as well.

### 16.3.2 Resolve sync errors

If a sync fails for a shared item, the item displays the error icon. The tooltip for the icon gives the reason why the sync failed. The icon is also displayed for a shared Folder if it contains one or more items in an error state.

If you are the share coordinator, or if you are a content sharing administrator, you can use the **Retry synchronization** command to attempt to resolve a sync error.

Select the check box for the item or items, click the **Show more** button for the Share button in the **Action Bar**, and then click **Retry synchronization**.

**Note:** If you use **Retry synchronization** on a Folder, all items in the Folder will be resynced with Core Share and will show the pending icon until the sync is complete.

**Tip:** You can also attempt to resolve sync errors by clicking the **Share** button in the **Inline Action Bar**, and then clicking **Retry synchronization**.

## 16.4 My Shares tile

Your administrator can make the **My Shares** tile available to you on the Home page or another location in Smart View.

#### What tabs can I view on the My Shares tile?

**Created by me**
A detailed list of all the Content Server items you have shared to Core Share, and for which you are a coordinator. For each item, the tab displays the Content Server location and the date when you originally shared it.

**Coordinated by me**
A detailed list of all the shared items for which you are a share coordinator, and for which you did not initiate the share. For each item, the tab displays the share location and the date on which it was shared. You can also manage shares and stop sharing on this tab.

**Shared to me**
A detailed list of all the Content Server items that others have shared with you in Core Share. For each item, the tab displays the date on which it was shared. In order to view the contents of this tab, you might be asked to sign in to Core Share.

**Note:** You can perform all standard actions on Documents, Emails, and Folders in this tile. For more information, see “Basic operations” on page 13 and “Documents“ on page 49.

## 16.5 Stop sharing

To stop sharing a Document, Email, or Folder that you shared, select the check box for the item, click the **Show more** button for the **Share** button in the **Action Bar**, and then click **Stop sharing**. This removes the Document, Email, or Folder from Core Share. Any sync processes for the item that are already underway will finish running before the sharing is stopped.

If you stop sharing a shared Folder, sharing is also stopped for all shared items inside the Folder. You cannot individually stop sharing any shared items that are inside a shared Folder.

If you attempt to stop sharing an item and an error occurs, the item is put into an error state. If you apply the **Stop sharing** command again on the item, the item is unshared even if not all issues can be resolved. In this case, you might need to go to Core Share to manually clean up items that were left there after the item was unshared.

**Note:** If you are a content sharing administrator, you can stop sharing for all items you have permissions to access, even if you did not share the items.

**Tip:** You can also stop sharing by clicking the **Share** button in the **Inline Action Bar**, and then clicking **Stop sharing**.

Chapter 17

# Wikis

A wiki is a collection of webpages that allows users to collaborate on the development of content. In Content Server, a wiki is the container that holds a collection of related wiki pages. If you have the proper permissions, you can create a wiki in Content Server, add any number of individual wiki pages to the wiki, and immediately publish the content.

You can perform further actions on the wiki and its components by opening the wiki in the Wiki View. See "Work with wiki components" on page 110.

## 17.1 Wiki components

**What are the components of a wiki?**

- **Wiki container**

  In Content Server, the Wiki object type is a container that holds a collection of wiki pages. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See "What you see when you open a wiki" on page 110.

  See also "Work with wiki components" on page 110.

- **Wiki page**

  A wiki page is an individual webpage in a wiki container. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See "What you see when you open a wiki" on page 110.

  **Note:** A wiki page can include a maximum of 2 million characters.

  See also "Work with content on a wiki page" on page 114.

- **Main page**

  Within the wiki container, you can set any wiki page as the Main page. When you open a wiki that has a Main page configured, that Main page appears by default. In Classic View, the Main page is called the Index page.

  See "What you see when you open a wiki" on page 110 and "Set a Main page" on page 125.

- **Overview page**

  The overview page *alphabetically* lists all the wiki pages included in the wiki and allows you to add a wiki page to the container. In Smart View, each wiki automatically generates an overview page. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See "What you see when you open a wiki" on page 110.

See “Access content or add content from the overview page” on page 117.

- **Sidebar**

  A sidebar is a column of content that appears on all pages of the wiki: on the wiki overview and on each wiki page. Typically, a sidebar contains metadata or information such as pictures, statistics, quotes, or links. For each wiki, you can add one or more sidebars.

  See “Manage sidebar content” on page 122.

- **Table of Contents**

  For each wiki page, as soon as there is more than one heading on the page, the Table of Contents automatically lists all headings on the page. If the Table of Contents exists, you can click the **Open/Close Table of Contents** button to expand or collapse the Table of Contents.

> **Note:** The Table of Contents in Smart View is independent of the **Display Table of Contents** setting in Classic View.

## 17.2 What you see when you open a wiki

When you open a wiki, the page that you see depends on the contents and settings of that wiki. The page that opens by default will be one of the following pages:

- **Main page**

  If you have set a Main page for the wiki, it will be the default page. See “Main page” on page 109.

- **Wiki page**

  If the wiki only contains a single wiki page, you will see that single wiki page as the default. See “Wiki page” on page 109.

- **Overview page**

  The overview page is the default page if you have not set a Main page for the wiki *and* if the wiki either has *no wiki pages* or *two or more wiki pages*. See “Overview page” on page 109.

## 17.3 Work with wiki components

You can work with the wiki and its components in either the Browse View or the Wiki View. When you open a wiki in the Wiki view, the default page may change depending on the Main page settings and the wiki pages added. When working on the default page, make sure that you are aware of whether you are working with the wiki container or a wiki page.

## 17.3.1 Make global changes to a wiki

In Content Server, the Wiki object type is a container that holds a collection of wiki pages. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See “What you see when you open a wiki” on page 110.

You can make global, non-content changes to a wiki or a wiki page in either the Browse View or in the Wiki View.

#### What can you do with a wiki container?

**Add a wiki**

In the Browse View, on the **Action Bar**, click the **Add item** button +, then click **Wiki**. In the **Name** box, enter the wiki name and click **Add**.

**Add new wiki page**

In the Wiki View, on the **Action Bar**, click the **More Actions** button ••• , then click **Wiki page**, and enter a name for the wiki page.

**Tip:** Add a new wiki page from the wiki overview page by clicking the **Add page** button. See Go to the wiki overview on page 112.

**Add new wiki sidebar**

In the Wiki View, on the **Action Bar**, click the **More Actions** button ••• , then click **Wiki sidebar**. In the sidebar area, enter a title for the sidebar, provide content, and click **Add sidebar**.

**Comments**

Comment on a the wiki container or a wiki page within the wiki container. To add, edit, or delete your own comment or to read or reply to another user’s comment on the wiki, in the Browse View, on the row for the wiki, click the **Comments** button .

**Tip:** To comment on a wiki in the Wiki View, from the overview page, on the **Action Bar**, click the **Comments** button . See “Overview page” on page 109.

**Copy**

Copy the wiki container, including all the wiki pages in it, or copy a single wiki page.
In the Wiki View, on the wiki **Functions** menu, click **Copy**.

**Tip:** You can also copy a wiki from the Browse View, on the **Inline Action Bar**, by clicking the **More Actions** button ••• , then clicking **Copy**. See “Copy and move items” on page 17.

**Delete**

Delete the wiki container, including all the wiki pages within it.

In the Wiki View, on the **Action Bar**, click the **More Actions** button ••• , then click **Delete**. See “Delete items” on page 18.

**Tip:** You can also delete a wiki from the Browse View, on the **Inline Action Bar**, by clicking the **More Actions** button ••• , then clicking **Delete**.

**Favorite**

Add the wiki container as a Favorite, or add a single wiki page as a Favorite. In the Wiki View, on the **Action Bar**, add the wiki as a Favorite by clicking the **Add Favorite** button ☆ or remove the wiki as a Favorite by clicking the **Remove Favorite** button ★ . See "Favorites tile" on page 11.

**Tip:** In the Browse View, on the row for the wiki, you can also add the wiki as a Favorite by clicking the **Add Favorite** button ☆ or you can remove the wiki as a Favorite by clicking the **Remove Favorite** button ★ .

**Go to the Main page**

On the wiki overview or from the Wiki View of a wiki page that is *not* set as the Main page, on the **Action Bar**, click the **More Actions** button ••• , then click **Main page**.

**Go to the page history**

See the **Version history** page in Classic View.

In the Wiki View of the wiki page, on the **Action Bar**, click the **More Actions** button ••• , then click **Page history**.

**Go to the wiki overview**

See a list of wiki pages in the wiki.

In the Wiki View, on the **Action Bar**, click the **More Actions** button ••• , then click **Wiki overview**.

**Move**

Move the wiki container, including all the pages within it.

In the Wiki View, on the **Action Bar**, click the **More Actions** button ••• , then click **Move**. See "Copy and move items" on page 17.

**Tip:** You can also move the wiki from the Browse View, on the **Inline Action Bar**, by clicking the **More Actions** button ••• , then clicking **Move**.

**Open the wiki**

In the Browse View, click the Wiki item to open the wiki in the Wiki View. See "What you see when you open a wiki" on page 110.

**Print**

You cannot print the wiki container, or the wiki overview, only the wiki pages within it.

In the Wiki View for a wiki page, on the **Action Bar**, click the **More Actions** button ••• , then click **Print** to print the current page.

**Properties**

View the properties for the wiki container. Add a description, or add a category.

In the Wiki View, on the wiki **Functions** menu, click **Properties**. See "View properties" on page 17.

**Tip:** You can also access properties from the Browse View, on the **Inline Action Bar**, by clicking the **Properties** button.

**Rename**

Rename the wiki container or the wiki pages within it.

- **Rename the wiki**
  - In the Browse View, on the **Inline Action Bar**, click the **Rename** button .
  - From the wiki overview page, on the wiki **Functions** menu, click **Rename**.

  **Note:** Renaming the wiki only changes the name of the wiki container, not the names of the wiki pages within it.

- **Rename the wiki page**

  In the Wiki View, on the wiki **Functions** menu, click **Rename**.

**Reserve**

Reserve a wiki contaier or an individual wiki page to prevent other users from making changes to it, from the Wiki View, on the wiki **Functions** menu, by clicking **Reserve**.

Unreserve a wiki that you have previously reserved, from the Wiki View, on the **Action Bar**, by clicking the **Reserved by** button.

**Tip:** Point to the **Reserved by** button on the **Action Bar** to see who reserved the wiki page.

**Note:** You can only unreserve a wiki that was reserved by another user if you have Admin privileges.

**Share**

Send an email to with a link to the wiki, in the Wiki View, by going to the **Action Bar**, and clicking **Share**. See "Share items" on page 17.

**Tip:** To share a wiki from the Browse View, on the **Inline Action Bar**, click the **Share** button .

**View permissions**

- **Wiki**

  You can see the permission settings for a wiki from the Browse View, on the **Inline Action Bar**, by clicking the **More Actions** button ••• , then clicking **View permissions**.

  **Note:** You can see the permission settings for a wiki from the Favorites Browse View, on the **Inline Action Bar**, by clicking the **View permissions** button. You can also see the permission settings for a wiki from the wiki overview page, on the wiki **Functions** menu, by clicking **View permissions**.

- **Wiki page**

  You can see the permission settings for a wiki page from the Wiki View for the wiki page, on the **Inline Action Bar**, by clicking the **More Actions** button ••• , then clicking **View permissions**.

## 17.3.2 Work with content on a wiki page

A wiki page is an individual webpage in a wiki container. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See "What you see when you open a wiki" on page 110.

You can only make wiki page content changes from the Wiki View.

### What can you do with a wiki page?

**Add new wiki page**

On the **Action Bar**, click the **More Actions** button ••• , then click **Wiki page**, and enter a name for the wiki page.

**Tip:** You can also add a new wiki page from the wiki overview page, by clicking **Add page**. See Go to the wiki overview on page 115.

**Add new wiki sidebar**

On the **Action Bar**, click the **More Actions** button ••• , then click **Wiki sidebar**. Enter a title for the sidebar, provide content, and then click **Add Sidebar**. See "Sidebar" on page 110.See "Edit a sidebar" on page 123.

**Add a comment**

To add, edit, or delete your own comment or to read or reply to another user's comment associated with the wiki page, on the **Action Bar**, click the **Comments** button .

**Copy the wiki page**
On the wiki page **Functions** menu, click **Copy**. See "Copy and move items" on page 17.

**Delete the wiki page**
On the wiki page **Functions** menu, click **Delete**. See "Delete items" on page 18.

**Edit the content on the wiki page**
On the **Action Bar**, click the **Edit** button . See "Edit a wiki" on page 117.

**Go to the Main page**
Go to the wiki page that is set as the Main page of the wiki container.

- If the wiki has a Main page set, the wiki will automatically open to the Main page.
- From the wiki overview or from a page in the wiki that is *not* set as the Main page, go to the Main page by going to the **Action Bar**, clicking the **More Actions** button ••• , then clicking **Main page** .

**Go to the page history**
See a list of the previous versions of the wiki page.

On the wiki page **Action Bar**, click the **More Actions** button ••• , then click **Page history**. On the Versions page, click a previous version to view it.

See also "Work with a previous version of a wiki page" on page 125.

**Go to the wiki overview**
See a list of wiki pages in the wiki container.

On the **Action Bar**, click the **More Actions** button ••• , then click **Wiki overview**.

**Open the wiki page**
On the overview page, from the List of pages, click a the name of a wiki page.

**Print**
On the **Action Bar**, click the **More Actions** button ••• , then click **Print** to print the current page.

**Note:** You cannot print the wiki overview page.

**Rename**
On the wiki page **Functions** menu, click **Rename**.

**Reserve / Unreserve**
When you edit a wiki page, the Wiki View automatically reserves that wiki page to prevent other users from editing that page. On the **Action Bar**, click the **Edit** button .

**Tip:** You can also reserve a wiki page, from the **Functions** menu, by clicking **Reserve**.

**Note:** When you close your wiki page editing session by saving or canceling, the Wiki View automatically unreserves the wiki page. If your editing session times out, the wiki page remains reserved. As the user who reserved the wiki page, you can unreserve it by clicking the **Reserved by** button on the **Action Bar**.

You can only unreserve a wiki that was reserved by another user if you have Admin privileges.

**Set / Unset as Main page**

Designate or dismiss the current wiki page as the Main page:

On the wiki page **Functions** menu, click **Set as Main page** or **Unset as Main page**. See "Main page" on page 109 and "Set a Main page" on page 125.

**Share**

Send an email with a link to the wiki page, from the **Action Bar**, by clicking the **Share** button .

**Tip:** You can also share a wiki page from the **Functions** menu, by clicking **Share**.

**Table of Contents**

In Smart View, a wiki page with more than one heading automatically generates a Table of Contents. Click the **Open/Close Table of Contents** button to expand or collapse the Table of Contents.

**View Properties**

View properties, add a description, or add a category, from the wiki page **Functions** menu, by clicking **Properties**. See "View properties" on page 17.

**Work with a previous version**

On the wiki page **Action Bar**, click the **More Actions** button , then click **Page history**. On the Versions page, click a previous version to view it.

See "Work with a previous version of a wiki page" on page 125.

### 17.3.3 Access content or add content from the overview page

The overview page *alphabetically* lists all the wiki pages included in the wiki and allows you to add a wiki page to the container. In Smart View, each wiki automatically generates an overview page. When you open a wiki, the page that you see depends on the contents and settings of that wiki. See "What you see when you open a wiki" on page 110.

See "What you see when you open a wiki" on page 110.

#### What can you do with an overview page?

**Add a new wiki page**
: Click **Add page**.

**Open a wiki page**
: Click a wiki page to open it.

### 17.3.4 Edit a wiki

While you have a wiki open in the Wiki View, you can click the **Edit** button on the **Action Bar**, to make changes to the wiki sidebars or the wiki pages.

**Notes**

- When you edit the wiki page, the page is automatically reserved. When you close the editing session, the page automatically unreserves.
- If your editing session times out, the wiki page remains reserved until an admin, or you, the content creator, unreserves it by clicking the **Reserved by** button on the **Action Bar**.

#### How can you edit a wiki?

**Description**
: On the wiki **Functions** menu, click **Properties**. On the **General** tab, click **Add Description** and edit the description.

**Rename**
: On the wiki **Functions** menu, click **Rename**.

**Wiki page**
: Add a wiki page, set it as the Main page, or edit the wiki page. See "Work with content on a wiki page" on page 114 and "Edit a wiki page" on page 118.

**Wiki sidebar**
: Add, move, delete, or edit a sidebar. See "Manage sidebar content" on page 122 and "Edit a wiki page" on page 118.

**Main page**
: Change the Main page. See "Set a Main page" on page 125.

### 17.3.4.1 Edit a wiki page

In the Wiki View, click the **Edit** button on the **Action Bar**, to enable Edit mode. In Edit mode, you can see the editing toolbar and can click in either the wiki page area or the wiki sidebar area that contains the content that you want to edit.

For information about how to edit a wiki sidebar, see “Edit a sidebar” on page 123.

After you make your changes, click the **Save** button . Click the **Cancel** button to exit Edit mode and unreserve the wiki page without saving any changes.

**Notes**

- When you edit the wiki page, the page is automatically reserved. When you close the editing session, the page automatically unreserves.
- If your editing session times out, the wiki page remains reserved until an admin, or you, the content creator, unreserves it by clicking the **Reserved by** button on the **Action Bar**.
- To switch the wiki page component you are editing, you must finish your current editing session, re-enable Edit mode, and click the other component that you want to edit.

#### How can you edit a wiki page?

| | |
|---|---|
| | **Undo**<br>Revert the last action. |
| | **Redo**<br>Revert the last undo. |
| Size | **Font Size**<br>Choose a font size. Default = 16. |
| Styles | **Formatting styles**<br>Choose from a list of predefined formatting that you can apply to block and inline elements. |
| Normal | **Paragraph format**<br>Choose from a list of predefined styles that you can apply to block-level elements. |
| Note | **Wiki admonition**<br>Choose from a list of predefined notes or warnings. |
| A | **Text color**<br>Choose from a list of predefined colors for the text. |
| A | **Background color**<br>Choose from a list of predefined colors for the text background. |

| | |
|---|---|
| B | **Bold**<br>Add bold formatting to the selected text element. |
| I | **Italic**<br>Add italic formatting to the selected text element. |
| U | **Underline**<br>Add underline formatting to the selected text element and any included spaces. |
| S | **Strikethrough**<br>Add strike-through formatting to the selected text element and any included any spaces. |
| $x^2$ | **Superscript**<br>Place superscript text above the baseline in a smaller font. |
| $x_2$ | **Subscript**<br>Place subscript text below the baseline in a smaller font. |
| $T_x$ | **Remove format**<br>To remove the text styling and revert to the default font, select text and click **Remove format**. |
| | **Replace**<br>Use the **Find and Replace** dialog box to find a word or phrase and replace it. |
| | **Insert/Remove numbered list**<br>Add or remove numbered list markers to or from the selected text. |
| | **Insert/Remove bulleted list**<br>Add or remove bulleted list markers to or from the selected text. |
| | **Increase indent**<br>Increase the indentation of the selected text by one increment. |
| | **Decrease indent**<br>Decrease the indentation of the selected text by one increment. |
| | **Align Left**<br>Align the selected text to the left margin. |
| | **Center**<br>Align the selected text symmetrically along the center vertical axis. |
| | **Align Right**<br>Align the selected text to the right margin. |
| | **Insert/Edit Link**<br>Use the **Link** dialog to insert a link. |
| | **Insert Content Server Link**<br>Use the **Select Content Server Object** dialog to insert a link to any Content Server object. |

**Anchor**
Use the **Anchor Properties** dialog box to add an anchor in the content. Use the **Insert/Edit Link** button to add a reference to an anchor on the same page.

**Insert Wiki Image**
Use the **Choose File to Upload** dialog box to insert an image. Use the **Image Properties** dialog box to specify additional image details.

**Table**
Use the **Table Properties** dialog box to specify the options for the table you want to insert.

**Insert special character**
Use the **Select Special Character** dialog box to insert a special character from the predefined list.

**Add or update code snippet**
Use the **Add or update a code snippet** dialog box to add or update code.

**Source**
Use the **Source** window to view the HTML source code of the page.

## 17.3.5 Edit a wiki table

In Wiki Edit mode, you can add a table to the wiki page. When you click in the table, a row of table editing buttons appear in the toolbar.

After you make your changes, click the **Save** button . Click the **Cancel** button to exit Edit mode and unreserve the wiki page without saving any changes.

**Tip:** If the table is large, you many need to use the horizontal scroll bar to see the entire table.

### How can you edit a wiki table?

**Insert Cell Before**
Add a cell *before* the current cell.

**Insert Cell After**
Add a cell *after* the current cell.

**Delete Cells**
Delete the selected cells from the table.

**Cell Properties**
Opens the **Cell Properties** dialog so that you can set the following cell properties:

- Width and Height

- Word Wrap
- Horizontal and Vertical Alignment
- Cell Type
- Row and Column Span
- Background and Border Color

**Merge Cells**
Merge the selected table cells on the same row.

**Merge Right**
Merge the selected single cell with the cell to the *right*.

**Merge Down**
Merge the current cell with the cell *below*.

**Split Cell Horizontally**
Splits the selected cell horizontally into two adjacent cells in the same column.

**Split Cell Vertically**
Split the selected cell vertically into two adjacent cells on the same row.

**Delete Table**
Delete the current table.

**Table**
Add a table by specifying the characteristics you want in the **Table Properties** dialog and then clicking **OK**.

**Table Properties**
Open the **Table Properties** dialog so that you can set the following table properties:

- Rows and Columns
- Width and Height
- Headers
- Border size
- Cell Spacing and Cell Padding
- Alignment
- Caption and Summary

**Insert Row Before**
Add a row *before* the current row.

**Insert Row After**
Add a row *after* the current row.

**Delete Rows**
Delete the current row or the selected rows.

**Insert Column Before**
Add a column *before* the current column.

**Insert Column After**
Add a column *after* the current column.

**Delete Columns**
Delete the current column or the selected columns.

**Move Column Right**
Moves the content in the current column one column to the right.

**Move Column Left**
Moves the content in the current column one column to the left.

**Move Row Up**
Moves the content in the current row up a row.

**Move Row Down**
Moves the content in the current row down a row.

## 17.3.6 Manage sidebar content

A sidebar is a column of content that appears on all pages of the wiki: on the wiki overview and on each wiki page. Typically, a sidebar contains metadata or information such as pictures, statistics, quotes, or links. For each wiki, you can add one or more sidebars.

**Note:** The Smart View sidebar is equivalent to the Classic View **Settings**.

### What can you do with a sidebar?

**Add a sidebar**

On the **Action Bar**, click **More Actions**, then click **Wiki sidebar**.

**Tip:** If the wiki already has a sidebar, you can add another sidebar, when in Edit mode, by clicking the editable sidebar area, and then clicking **Add sidebar**.

Enter a sidebar title and some content and then click **Save**.

**Delete**

In the editable sidebar area, click the **Delete** button, then go to the toolbar and click **Save**.

**Edit**

From the Wiki overview page, on the **Action bar**, click the **Edit** button . In the editable sidebar area, make your changes, then go to the toolbar and click **Save**. See “Edit a sidebar” on page 123.

**Notes**

- To edit the sidebar from any the wiki page where you can see the sidebar, on the **Action bar**, click the **Edit** button , then click anywhere in the sidebar and make your changes.
- You can edit the text in the sidebar title, but cannot change the formatting. Sidebar titles must always be centered.

**Move**

In the editable sidebar area, click the **Move Up** button to move the sidebar before the previous one or click the **Move Down** button to move the sidebar after the following sidebar, then go to the toolbar and click the **Save** button .

## 17.3.7 Edit a sidebar

In the Wiki View, click the **Edit** button on the **Action Bar**, to enable Edit mode. In Edit mode, click in sidebar area to see the sidebar editing toolbar.

For information about how to edit a wiki page, see "Edit a wiki page" on page 118.

After you make your changes, click the **Save** button . Click the **Cancel** button to exit Edit mode without saving any changes.

**Notes**

- You can edit the text in the sidebar title, but cannot change the formatting. Sidebar titles must always be centered.
- The sidebar editing toolbar contains a subset of the functions for editing a wiki page.

### How can you edit a wiki sidebar?

**Undo**
Revert the last action.

**Redo**
Revert the last undo.

Size **Font Size**
Choose a font size. Default = 16.

Styles **Formatting styles**
Choose from a list of predefined formatting that you can apply to block and inline elements.

**Text color**
Choose from a list of predefined colors for the text.

**Background color**
Choose from a list of predefined colors for the text background.

**Bold**
Add bold formatting to the selected text element.

**Italic**
Add italic formatting to the selected text element.

**Underline**
Add underline formatting to the selected text element and any included spaces.

**Remove format**
To remove the text styling and revert to the default font, select text and click **Remove format**.

**Replace**
Use the **Find and Replace** dialog box to find a word or phrase and replace it.

**Increase indent**
Increase the indentation of the selected text by one increment.

**Decrease indent**
Decrease the indentation of the selected text by one increment.

**Align Left**
Align the selected text to the left margin.

**Center**
Align the selected text symmetrically along the center vertical axis.

**Align Right**
Align the selected text to the right margin.

**Insert/Edit Link**
Use the **Link** dialog to insert a link.

**Insert Content Server Link**
Use the **Select Content Server Object** dialog to insert a link to any Content Server object.

**Anchor**
Use the **Anchor Properties** dialog box to add an anchor in the content. Use the **Insert/Edit Link** button to add a reference to an anchor on the same page.

**Insert Wiki Image**
Use the **Choose File to Upload** dialog box to insert an image. Use the **Image Properties** dialog box to specify additional image details.

| | |
|---|---|
| Ω | **Insert special character**<br>Use the **Select Special Character** dialog box to insert a special character from the predefined list. |
| | **Source**<br>Use the **Source** window to view the HTML source code of the page. |

## 17.3.8 Set a Main page

Within the wiki container, you can set any wiki page as the Main page. When you open a wiki that has a Main page configured, that Main page appears by default. In Classic View, the Main page is called the Index page.

See "What you see when you open a wiki" on page 110.

In the Wiki View, open a wiki page either by clicking on the List of pages on the wiki overview page, or by adding a new wiki page. To unset the page as a Main page, on the wiki page **Functions** menu, click **Set as Main page**.

## 17.3.9 Work with a previous version of a wiki page

Upon accessing the Versions page, which shows the history for a wiki page, you can work with previous versions of a wiki page.

To open the Versions page, on the **Action Bar**, click **More Actions** ••• , then click **Page history**.

**What can you do with a previous version of a wiki page?**

**Compare**

- On the **Versions** page, select the check boxes for the two versions that you want to compare and on the **Action Bar**, click **Compare**.
- The Compare page shows both the recent version and the older version and shows the following differences:
  - Content added
  - Content removed
  - Content reformatted

**Delete**

On the **Versions** page, select the check box for the one or more versions that you want to delete and on the **Action bar**, click **Delete**.

**View**

- On the **Versions** page, click the name of the previous version that you want to view.

- On the **Compare** page, to view only one of the previous versions being compared, on the Compare bar, click the version number.

**View properties**
On the **Versions** page, select the check box for one or more versions for which you want to view properties and on the **Action bar**, click **Properties**.

Chapter 18

# Workflows

A Workflow is a tool that allows you to automate and monitor business processes. For example, a simple Workflow might consist of only a few steps that allow you to request a vacation day, your manager to approve or reject the request, and a human resources representative to track the time off. A complex Workflow can have numerous steps and require the participation of dozens of users.

### What can you do with Workflows?

**Edit a Workflow Map**
In Browse View, select a Workflow and click **Edit** on the **Action Bar** to open the Workflow Designer for that Workflow.

**Start a Workflow**
Starting a Workflow opens the Start step. See "Start a Workflow" on page 128 and "Complete the Start step" on page 129.

**Complete a Workflow assignment**
See "Complete a Workflow assignment" on page 130.

**Monitor your Workflows**
If configured, you can view details of Workflow steps, reassign Workflow assignments, and communicate with Workflow participants. See "Track your Workflows" on page 136.

## 18.1 Workflow terminology

**Attribute**
The Workflow Map author creates Attributes that are used in Workflow Maps to collect information or to display information in a Workflow step. Attributes used to collect information can be different input types, including text fields, lists, popup dialog boxes, and check boxes (which display as switches in Smart View). If the Workflow Map author enables Forms and adds a Form Template to a Workflow Map, the author can also use the Attributes defined in the Form Template to collect or display information.

For example, in an Edit step of a document review Workflow, Attributes can be used to automatically display the name of the editor and the date of the editorial review. Other Attributes might require a Workflow participant to acknowledge that an edited version of the document is attached to the step and to indicate if the edit is complete.

**Workflow Assignment**
A Workflow assignment is a step in a Workflow that is assigned to a Workflow participant.

**Workflow Designer**
Workflow Designer is a component of the Workflow module. A Workflow Map author designs, creates, and modifies the pieces of a Workflow Map in the Workflow Designer. The Workflow Map author accesses the Workflow Designer from both Classic View and Smart View.

**Workflow Map**
A Workflow Map is a graphical representation of a business process. It contains a series of linked steps that define tasks, users, milestones, evaluations, and other functions that are performed sequentially or in parallel. A Workflow Map also contains a work package which consists of attachments, comments, and attributes. General settings, which affect the entire Workflow Map, such as management permissions, due date calculations, the type of information included in the work package, and other settings are also defined in the Workflow Map.

**Workflow Map Author**
A Workflow Map author designs Workflow Maps and related objects using the Workflow Designer.

## 18.2 Edit a Workflow Map

Workflow Map authors can access the Workflow Designer from Smart View. Click **Edit** on the **Action Bar** or **Inline Action Bar** in Browse View. The Workflow Designer opens in a new tab.

### How can you edit a Workflow Map?

**From the Inline Action Bar**

Position the pointer over a Workflow Map, click the **More actions** button ••• on the **Inline Action Bar**, then click **Edit**.

**From the Action Bar**
Select the check box for a Workflow Map, and the click **Edit** on the **Action Bar**.

## 18.3 Start a Workflow

When you are ready to complete a task that is defined by a Workflow, you can start the Workflow. When you start a Workflow, Content Server creates a working copy or instance of the Workflow Map. The work that occurs during the processing of the Workflow is stored in the Workflow instance.

Depending on the configuration of the Workflow Map, you might be able to start the Workflow from a Content Server Item, for example from a Document, Business Workspace, Folder, or Email, instead of starting the Workflow from the Workflow Map. When you start a Workflow from an Item, a shortcut to the Item is automatically attached to the Workflow.

You can also select more than one item and start a Workflow. If you select more than one type of Item, for example, a Document and a Business Workspace, you can choose to start a Workflow Map that is configured for initiation from both types of Items.

**Note:** Depending on how the Workflow Map author configured the Workflow Map, you might only be able to start a Workflow on items that have specific Category Attributes or Classifications. If you are starting a Workflow on multiple items, the Categories and Classifications defined for the Workflow Map must be set on all of the items.

After you start a Workflow, the Start step opens. Depending on the configuration of the Start step, the step opens in Smart View or Classic View. See "Complete the Start step" on page 129.

**How can you start a Workflow?**

**From a Workflow Map**

Position the pointer over a Workflow Map, click the **More actions** button on the **Inline Action Bar**, then click **Start Workflow**.

**From an item**

Position the pointer over an item, click the **More actions** button on the **Inline Action Bar**, then click **Start Workflow**. If more than one Workflow Map is configured for this item, click the **Select workflow type** button , then select the Workflow Map you want to start.

**From multiple items**

Select the check box for the items that you want to start a Workflow for, click **Start Workflow** in the **Action Bar**. If more than one Workflow Map is configured for the items, click the **Select workflow type** button , then select the Workflow Map you want to start.

## 18.4 Complete the Start step

If more than one Workflow is available for this Item, click the **Select workflow type** button , and select a Workflow Map. Review the instructions for the Start step and complete any required actions, such as updating the title of the Workflow, entering a due date for the Workflow, adding an attachment or providing values for required Attributes. See "Common tasks in Workflow assignments" on page 133. After you complete the required actions, click **Start** to begin the Workflow, type any comments, then click **Submit**.

**Note:** If authentication is enabled for the Start step, you must type your password in the **Password** box before you can start the Workflow.

If you cancel the Start step, the Workflow is cancelled.

## 18.5 Complete a Workflow assignment

Review the instructions for the assignment and complete any required actions, such as reading an attachment and uploading a revised version or providing values for Attributes. See "Common tasks in Workflow assignments" on page 133. After you complete the actions requested in the Workflow assignment, send the Workflow to the next step.

Typically, *User* and *Initiator* Workflow steps have a **Send On** and a **Close** button. If the Workflow Map author configured custom buttons, called *Dispositions*, the dispositions replace the default **Send On** action. The **Send for review** and **Forward** buttons appear if the Workflow Map author enabled the permissions for those features for the Workflow step.

If authentication is enabled for a Workflow step, you must type your password before you can complete the assignment.

If you close the Workflow assignment, changes to the assignment are saved, but the assignment is not complete and remains on your **My Assignments** tile.

#### How can you complete a Workflow assignment?

**Send on**
Click **Send On** to send the Workflow to the next step. Type any comments, type your password if required, then click **Submit**.

**Forward to another user**
See "Forward an assignment" on page 131.

**Send for review**
See "Send an assignment for review" on page 132.

**Select a disposition**
Click a disposition to send the Workflow to the next step. Type any comments, type your password if required, then click **Submit**.

**Note:** **Approve** and **Reject** are examples of dispositions that can be configured for a Workflow step.

### 18.5.1 Forward an assignment

When you forward a Workflow assignment, you are delegating the assignment to another user or user group that you want to complete the task. When you forward a Workflow step that is configured to use a loopback link, the loopback link sends the step to your delegate.

When you forward a Workflow assignment to a user group, only one member of the group can accept and complete the assignment. After a user in the group accepts the assignment, the assignment is removed from the **My Assignments** tile for all of the other group members.

**Note:** The **Forward** button is available if the Workflow Map author enabled the **Delegate** permission for this step in the Workflow Map.

**To forward a Workflow assignment:**

1. On your **My Assignments** tile, click the Workflow assignment.
2. Click **Forward**.
3. If required, type your password in the **Password** box.
4. Start typing the name of the user or group you want to forward the assignment to in the **Forward to** box, then select the name from the list.
5. Type any comments in the **Add comments** box, then click **Send**.

### 18.5.2 Set a proxy user

To automatically delegate your Workflow assignments, set a proxy user to take them over and complete them on your behalf. The user that you set as your proxy receives all of your current and future Workflow assignments. When you remove a proxy user, all of your assignments return to you.

**To set a Workflow proxy user:**

1. Click the **Profile Menu** button and choose your user name to open your profile.
2. Click the **Proxies** tab.
3. Start typing the name of the user that you want to set as your proxy in the **Workflow proxy** box and choose the user from the list.
4. Optional To change a proxy user, click the **Edit** button next to their name and enter the name of a different user.

5. Optional To remove a proxy user, click the **Edit** button next to their name and remove all text from the box.

6. Press **ENTER** or click outside of the box to save your change.

**Note:** Workflow proxy functionality is available if your system does not have the OpenText™ Extended ECM for Government module installed. If this module is installed, the **Proxies** tab shows Extended ECM for Government proxy information instead. For more information, see *Extended ECM for Government - Smart View User Help (CSEEFGDE-H-UGD)*.

## 18.5.3 Send an assignment for review

After you complete the task in a Workflow assignment, you can send the Workflow assignment to another user or user group for review. When the user or members of the user group complete the review of the information in the step, the Workflow reassigns the step to you.

If you send a Workflow assignment to a user group for review, you select whether one group member or all of the group members must accept and complete the assignment before the Workflow can move to the next step. When a Workflow step is assigned to a user group, the assignment appears on the **My Assignments** tile of each group member.

**Note:** The **Send for review** button is available if the Workflow Map author enabled the **Send for review** permission for this step in the Workflow Map.

**To send a Workflow assignment for review:**

1. On your **My Assignments** tile, click the Workflow assignment.

2. Complete the task in the assignment, then click **Send for review**.

3. If required, type your password in the **Password** box.

4. Start typing the name of the user or user group that you want to send the assignment to in the **Send to** box, then select the name from the list.

5. If you are sending the step to a user group, in the **Options to accept** box, do one of the following:

   - Click **One group member** to require only one member of the group to accept and complete the assignment. After a user in the group accepts the assignment, the assignment is removed from the **My Assignments** tile for all of the other group members.

   - Click **All group members** to require each member of the group to accept and complete the Workflow assignment before the Workflow can move to the next step. After a group member completes the Workflow assignment, the assignment is removed from the **My Assignments** tile for that user.

6. Type any comments in the **Instructions** box.

7. To set how long the reviewer has to complete the step, type a value in the **Duration** box, then select **Hours** or **Days** in the list. Do not set the duration of the review to be longer than the due date for the assignment.

8. Click **Send**.

## 18.6 Common tasks in Workflow assignments

**See more/see less**
If instructions are configured for the Workflow assignment, click the **Show more** button ⌄ to display instructions for the assignment. Click the **Show less** button ⌃ to hide the instructions.

**Provide values for Attributes**
Provide a value for each Attribute. Attributes with an asterisk are required. See Attribute on page 127.

**Add, view, edit, and manage attachments**
Click the **Attachments** tab to view and manage Workflow attachments. See “Workflow attachments” on page 133.

**View Workflow activity**
Click the **Activities** tab to view the actions that have occurred during the Workflow. See “Workflow activities” on page 135.

### 18.6.1 Workflow attachments

If attachments are enabled for the Workflow Map, you can view, edit, and download an attachment on the **Attachments** tab. You can also attach new files to the Workflow. Position the pointer over an attachment to view the available actions.

#### What can you do on the Attachments tab?

**Add attachment**
Click the **Add attachment** button to add a file from your computer or Content Server, or add a shortcut to an item in Content Server. You can also drag files that are saved on your computer in to the assignment.

**Add description**
Click in the **Add description** area to add a description to, or change the description of, an attached file.

**View and edit properties**
Click the **Properties** button to view the properties of the attachment, then click the **Go back** button to return to the Workflow assignment. See “View properties” on page 17.

**Edit an attachment**

Click the **Edit** button to automatically reserve the file and open the attachment in the appropriate application. Modify the attachment, save your changes, and close the application. Smart View unreserves the file and adds the new version of the file to the Workflow. Your update is tracked on the **Activities** tab. See “Workflow activities” on page 135.

This feature is only available for Microsoft® Office file types.

**Notes**

- If the attachment is a shortcut, click the **Properties** button to open the **Properties** page for the original document. In the **General** section, click the **Show more** button for the file, then select **Edit**.
- If Smart View encounters a problem and does not automatically unreserve the file, you can unreserve the file in the OpenText™ Office Editor. OpenText Office Editor is installed on your local computer.

**Download**

Click the **Download** button to save the attachment to your computer. Depending on your browser, the file automatically downloads or you are prompted to select what you want to do with the file, for example, open it or save it.

**Rename**

Click the **Rename** button to change the name of an attachment that you added to the Workflow.

**Copy**

Click the **More actions** button and then click **Copy**. Choose a location for the copy to be created in, and then click **Copy**.

**Move**

Click the **More actions** button and then click **Move**. Choose a location for the item to be moved to, and then click **Move**.

**Add version**

Click the **More actions** button and then click **Add version** to replace the existing version of the attachment with a new version of the file located on your computer or in Content Server.

**Cancel**

When you are adding a description or renaming an attachment, click the **Cancel** button to revert to the original description or file name.

**Open**

Click the **Open** button to view attachment or to save the attachment to your computer. Depending on your browser, the file automatically downloads or you are prompted to select what you want to do with the file, for example, open it or save it.

**Tip:** You can also click the name of the attachment to open the file.

**Delete**

Click the **Delete** button to delete the attachment from the Workflow. Or, click the **More actions** button and then click **Delete**.

## 18.6.2 Workflow activities

On the **Activities** tab you can view the actions taken during the Workflow. If comments are enabled for the Workflow Map, you can also view comments that were added when a user completed an action.

If the Workflow contains a sub-Workflow, the **Activities** tab for the parent Workflow does not show actions taken during steps in the sub-Workflow. Click the **Activities** tab for a step in the sub-Workflow to view details about the actions taken during the sub-Workflow.

### What can you do on the Activities tab?

**View details about Workflow activities**
View the name of the user who completed an action during the Workflow, the date and time the action occurred, and comments entered by the user when the action was completed.

**Tips**

- The **Update** action displays when a user attaches a new version of an attachment to the Workflow. The **Reply** action displays when a user provides feedback on a Workflow assignment that was sent for review.
- If **Anonymous User** displays instead of a user name in the Workflow activities, your administrator has configured the system to exclude user names from Workflow audit logs.

**Open an attachment**
Click the name of the file to view the attachment or to download the attachment to your computer. Depending on your browser, the file automatically downloads or you are prompted to select what you want to do with the file, for example, open it or save it.

**View user profile**
Click the name of a user to view the user’s profile.

### 18.6.3 Workflow signatures

The **Signatures** tab displays signatory events and actions that have occurred during the Workflow. This includes the following information:

- The email of the user who completed a signing action
- The date a document was sent to be signed
- The date a user signed a document
- The date Content Server retrieved a signed document from DocuSign

## 18.7 Track your Workflows

If configured, the **Workflow Tracking** tile and the **Workflow Monitoring** tile appear in Content Server Smart View.

**Note:** Workflow tiles might have names that are different from the default names. Your administrator, or a user with the required permissions, can customize the name of each Workflow tile. Also, your administrator configures whether the chat feature is available in the Workflow tiles.

The **Workflow Tracking** tile displays the status of your managed and initiated Workflows. You can see how many of your Workflows are on time, late, stopped, or complete. If you only have one Workflow, you can view details about that Workflow on the collapsed tile. Your administrator, or a user with the required permissions, configures the length of time completed Workflow steps display on the tile and the types of Workflows that display.

The **Workflow Monitoring** tile displays Workflows that meet the search criteria defined in a Workflow Status item. If there is only one Workflow that meets the search criteria, you can view details about that Workflow on the collapsed tile. Your administrator, or a user with the required permissions, selects the Workflow Status item used to display Workflows on the tile.

#### What can you do on the Workflow Tracking tile and the Workflow Monitoring tile?

**Open the expanded view**
Click the total number of Workflows to open the expanded view.

**Filter the Workflows that display in the expanded view**
Click a Workflow state, for example, **On time**, **Completed**, **Stopped**, or **Late**, to filter the list of Workflows that opens in the expanded view. You can also click a status area on the interactive chart.

**Note:** A Workflow that has been suspended is shown as **On time** if the current date is on or before the due date for the current assignment. A Workflow that has been suspended is shown as **Late** if the current date is after the due date for the current assignment.

### What can you do in the expanded view?

**View details about a Workflow**

View the status, due date, Workflow name, current Workflow step, user assigned to the current step, and the date the Workflow was started. Position the pointer over the Workflow to see if the Workflow contains steps that run in parallel. If the Workflow contains parallel steps, steps are ordered by the due date. If the Workflow step is assigned to a user group, the **Assigned to** column displays the name of the first user in the group and the number of additional users in the group. See “User groups” on page 139.

**View details about the progress of a Workflow**

Click a row to view more details about the current Workflow step. If the Workflow contains steps that run in parallel, position the pointer over the current step, then click a step in the list to view more details. See “Progress view” on page 138.

**Sort Workflows**

Click in the heading of a column, then click the **Click to sort ascending** button or the **Click to sort descending** button to sort the Workflows.

**Search for a Workflow**

Click the **Search by workflow** button then start typing the name of the Workflow you want to find in the list.

**Filter Workflows by status**

Click the **Filter** button then select one or more check boxes to refine the list of Workflows that display in the list.

**Chat with, email, or view the contact card of an assignee**

See “Communicate with an assignee” on page 139.

**Reassign the Workflow assignment**

Click the name of the user or user group assigned to an active Workflow step, then click **Reassign**. Type the new assignee’s name or the name of a user group in the **Reassign to** box, type a message to the assignee, then click **Submit**. If the Workflow contains steps that run in parallel, position the pointer over the current step, then click a step in the list to reassign the Workflow step.

**Tip:** You cannot reassign a completed Workflow step.

### 18.7.1 Progress view

The progress view displays a simplified image of the Workflow, with points representing the start, completed, current, next, and end Workflow steps. You might see dates for the start, end, and next steps, if dates are defined in the Workflow.

**What can you do in the progress view?**

**View details about Workflow steps**
Click **Completed Step**, **Current Step**, or **Next Step** to view information about the Workflow step, including the step name, user assigned to the step, and status. If more than one Workflow step is complete or if the current step has multiple steps running in parallel, position the pointer over **Completed Steps** or **Current Steps**, then click the step in the list that you want to view more information about. If the next step in the Workflow is unknown until the current step is complete, **Next Step** will not show any information.

**View Workflow details**
Click the **Details** tab to view details about the Workflow, including the Workflow name, due date if defined, Workflow status, user who initiated the Workflow, start date, and Workflow ID.

**View attachments**
Click the **Attachments** tab to view the files attached to the Workflow. Click an attachment to open the file or download the attachment to your computer. Depending on your browser, the file automatically downloads or you are prompted to select what you want to do with the file, for example, open it or save it.

**Chat with, email, or view the contact card of an assignee**
See "Communicate with an assignee" on page 139.

**Reassign a Workflow assignment**
Click the name of the user or user group assigned to an active Workflow step, then click **Reassign**. Type the new assignee's name or the name of a user group in the **Reassign to** box, type a message to the assignee, then click **Submit**. If the Workflow contains steps that run in parallel, position the pointer over **Current Steps**, then click a step in the list that you to reassign.

**Tip:** You cannot reassign a completed Workflow step.

**Stop a running Workflow**
In the **Details** tab of a running Workflow, click **Stop** to stop the Workflow.

**Note:** Stopped Workflows cannot be resumed.

**Delete a stopped Workflow**
In the **Details** tab of a stopped Workflow, click **Delete** to permanently delete the Workflow.

### 18.7.2 Communicate with an assignee

You can communicate with a Workflow assignee from the expanded view and from the progress view. If the Workflow contains steps that run in parallel, select the Workflow step first. If a Workflow step is assigned to a user group with many members, you might need to search for a specific user. See "User groups" on page 139.

#### How can you communicate with an assignee?

**View contact information for an assignee**

Click the name of the user assigned to the Workflow step to view the user's contact card, including email address, phone numbers, and picture, if available. The contact information that displays is the information configured for the user in Content Server. The status of the current Workflow assignment displays in the user's contact card.

If the assignment is assigned to a user group, click the name of the user group, then find the user that you want to view contact information for and position the pointer over the name of the user.

**Send an email to an assignee**

Click the name of the user assigned to the Workflow step, then, if available, click the user's email address. If the Workflow step is assigned to a group, click the name of the user group, find the user in the group that you want to email and position the pointer over the user's name, then click the user's email address.

**Chat with an assignee**

Click the name of the user assigned to the Workflow step, then click **Chat**. If the assignment is assigned to a group, click the name of the user group, find the user in the group that you want to chat with and position the pointer over the user's name, then click **Chat**.

**Note:** Contact your Content Server administrator if the **Chat** button is not available or if the chat feature does not work with the instant messaging client on your computer.

### 18.7.3 User groups

When a Workflow step is assigned to a user group, the Workflow step displays the name of the first user in the group as the assignee and shows the number of additional members in the group, for example, **Adam Smith +14**. Users in a user group are ordered alphabetically. If a user group only has one member, the Workflow only displays the user's name.

#### What can I do with user groups?

**View members of the user group**

Click the user group to view a list of the users in the group.

**Search for a user in the group**

Click the user group, click the **Search by Group User** button , then start typing the user’s name.

**Chat with, email, or view the contact card of a group member**

See “Communicate with an assignee” on page 139.

**Reassign the Workflow assignment**

Click the name of the user group, position the pointer over a user in the group, then click **Reassign**. Type the new assignee’s name or the name of a user group in the **Reassign to** box, type a message to the assignee, then click **Submit**.