

Folders and WebDAV User Guide
10g Release 3 (10.1.3.3.2)

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Folders and WebDAV User Guide, 10g Release 3 (10.1.3.3.2)

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INTRODUCTION

OVERVIEW

This section covers the following topics:

- ❖ [About this Guide](#) (page 1-1)
- ❖ [What's New](#) (page 1-2)
- ❖ [Conventions](#) (page 1-3)

ABOUT THIS GUIDE

This guide explains how to use the Folders component and WebDAV. It is intended for content consumers and contributors.

Folders Component

The Folders component provides a hierarchical folder interface to content in Content Server.

WebDAV

WebDAV (Web-Based Distributed Authoring and Versioning) provides a way to remotely author and manage your content using clients that support the WebDAV protocol. For example, you can use Microsoft Windows Explorer to check in, check out, and modify content in the repository rather than using the browser interface.

WebDAV can be used with Content Server.

WHAT'S NEW

This section describes the new features in version 10gR3 of the Folders component and WebDAV.

❖ **Improved Page Rendering Performance**

When version 10gR3 of the Folders component and WebDAV is installed on Content Server 7.1 or higher, you will see increased performance when displaying folder exploring pages (especially when a folder contains a large number of content items).

❖ **Improved Query Performance**

In this version of the Folders component and WebDAV, the query performance has been modified and enhanced. For example, the time required to open a folder's Hierarchical Folder Information page, browse through folders, or search projects has improved markedly.





❖ **New WebDAV Document Title Allocation**

A new WebDAV title allocation configuration setting determines the title of new content checked into the content server using WebDAV. Depending on how your system administrator has set up the system, the title of the content item will be either the file name (with or without file extension) or the default title metadata value for the folder the content item is dropped into.

CONVENTIONS

The following conventions are used throughout this guide:

- ❖ The notation *[Instance_Dir]/* is used to refer to the location on your system where the Content Server instance is installed (for example, *C:/Stellent/idm1/*).
- ❖ Forward slashes (/) are used to separate the directory levels in a path name. This is true when referring to files on a Windows file system or on a UNIX system. A forward slash will always appear after the end of a directory name.
- ❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbol	Description
	Note: Brings special attention to information.
	Tech Tip: Identifies information that can be used to make your tasks easier.
	Important: Identifies a required step or required information.
	Caution: Identifies information that might cause loss of data or serious system problems.

ABOUT FOLDERS AND WEBDAV

OVERVIEW

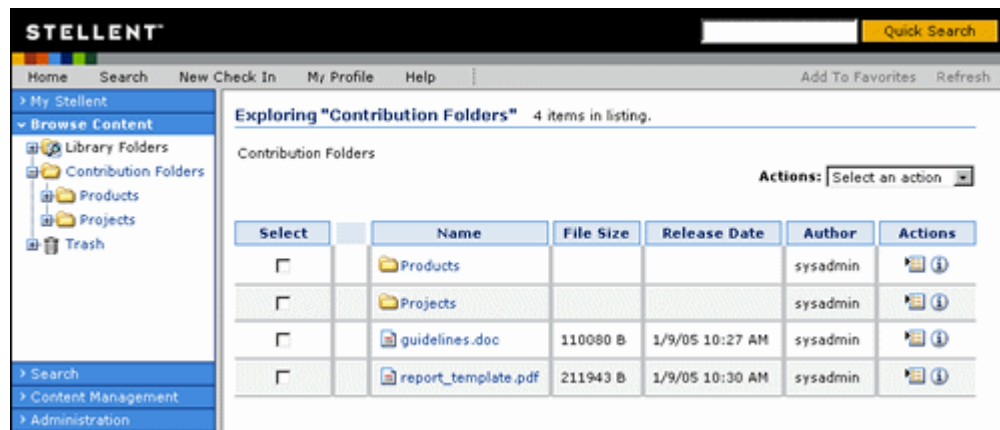
This section covers the following topics:

- ❖ [About Folders](#) (page 2-1)
- ❖ [About WebDAV](#) (page 2-5)

ABOUT FOLDERS

Folders is an optional component for use with Content Server which provides a hierarchical folder interface to content in Content Server in the form of “virtual folders” (also called “hierarchical folders”). Virtual folders enable you to create a multi-level folder structure. Figure 2-1 shows virtual folders as viewed from a content server web page.

Figure 2-1 Virtual folders in Content Server interface (Trays layout with Stellent05 skin)



Virtual folders provide two main benefits:

- ❖ Users can find content by drilling down through a familiar folder-type interface.



Note: Some of the fields in the My View search results are unavailable or not applicable when browsing through virtual folders. For example, if the user enables Vault File Size as a column in their My View, this field will be populated when performing searches, but it will be blank when browsing through virtual folders.

- ❖ Users can apply default metadata to content items by checking them in through a particular folder.

Content Item Security

The user logins and security controls in Content Server also apply to content that is managed through virtual folders. For example, if you have Read permission for a content item, you will be able to view the file, but you will not be able to check in a revision to the file.

Folder Metadata Inheritance

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

Subsequent changes to a parent folder’s metadata do not affect the metadata for existing subfolders. If you want to apply a parent folder’s metadata to subfolders and content items, you can use the [Metadata Propagation](#) feature (see page 2-4).

Default Metadata Values

When a file is checked into the content server through a virtual folder, default metadata values are entered on the content check-in form automatically. Default metadata values are evaluated in the following order:

1. **Virtual folder default values:**

When you click the Check In Content icon on an Exploring page, any content default metadata values defined for that virtual folder are entered on the content check-in form. These values are defined on the [Hierarchy Folder Configuration Page](#) (page 3-20).

2. **User default metadata values:**

If any content metadata defaults are not defined for the virtual folder, the user's default metadata values are applied. These values are defined by each user for new content items on their [Default Information Field Configuration Page](#) (page 3-6), and for revised content items on their [Revision Information Field Configuration Page](#) (page 3-7).



Important: User default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server web interface.

3. **System default metadata values:**

The system default values are applied to any fields that are not defined by the virtual folder or the user's default metadata. These values are defined by the system administrator.



Important: System default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server web interface.

4. **None:**

A metadata field can be blank as long as it is not a required field. If a required field is left blank, an error will occur and the content item will not be checked in.

Trash Bin

The *Trash Bin* function is an optional feature that sends deleted items to a Trash folder, rather than permanently deleting the items. Items in the Trash folder can then be permanently deleted or restored to their original location in the folder hierarchy. This enables users to recover files and folders that have been mistakenly deleted.

Please note the following considerations with regard to the Trash Bin feature:

- ❖ The Trash folder is a system-level folder, which works much like a normal folder except that items deleted from the Trash folder are permanently deleted. See [Trash Exploring Page](#) (page 3-15).
- ❖ Deleting a revision from a content information page bypasses the Trash folder and permanently deletes the revision.
- ❖ Users can select whether they want to make use of the Trash folder, or permanently delete items immediately. They can also choose whether to see all deleted items in the Trash folder, or just the items they deleted themselves. See [Folder Configuration Page](#) (page 3-4).

Metadata Propagation

The *metadata propagation* function enables contributors to copy default metadata values from a folder to its subfolders and content items. Typical uses for this function include:

- ❖ After moving a large number of content items to a new folder structure, you want to apply the top-level folder's default metadata to all subfolders and content items.
- ❖ You revised the default metadata for a folder, and you want to apply it to subfolders and content items within that folder.

Please note the following considerations with regard to metadata propagation:

- ❖ The propagation function applies each folder's metadata to all "uninhibited" subfolders and content items within those folders. This means that each uninhibited subfolder and content item will inherit the metadata of the folder from which propagation was launched.
- ❖ When you inhibit a folder, it is not affected by metadata propagation from a higher-level folder. However, you can still launch metadata propagation *from* an inhibited folder.
- ❖ The system administrator selects which metadata fields are included in propagation. (This is a system-wide setting.) By default, no metadata fields are included until they are specifically selected for metadata propagation.
- ❖ If a folder metadata field does not have a value defined, subfolders and content items within that folder may not inherit the "blank" value during propagation and any existing metadata values may stay intact for these items. This depends on how the system administrator has set up the system.

- ❖ When you launch metadata propagation, only folders and content items for which you have Write permission to the security group will be affected.

Folder Content Item Revisions

When documents are edited and checked into the content server, the revised document must undergo a process that involves being converted, indexed, and released. Before this process is complete, the system considers the revised document to be the “latest” version. After the process is complete, the system considers the revised document to be the “latest released” version.

Depending on how Folders has been set up, users with read access to the content item will see either the latest version or nothing at all if the item is not released. Authors, however, will always see the latest version. By default, the latest version is available to all users with read access.

ABOUT WEBDAV

WebDAV (Web-Based Distributed Authoring and Versioning) provides a way to remotely author and manage your content using clients that support the WebDAV protocol. For example, you can use Microsoft Windows Explorer to check in, check out, and modify content in the repository rather than using the browser interface.

What is WebDAV?

WebDAV is an extension to the HTTP/1.1 protocol that allows clients to perform remote web content authoring operations. The WebDAV protocol is specified by RFC 2518.0.



Note: See the WebDAV Resources Page at <http://www.webdav.org> for more information.

When WebDAV is used with a content management system such as Content Server, the WebDAV client serves as an alternate user interface to the native files in the content repository. The same versioning and security controls apply, whether an author uses the web browser interface or a WebDAV client.



Note: In Content Server, the WebDAV interface is based on the hierarchical Folders interface. See [About Folders](#) (page 2-1) for more information.

WebDAV Clients

A WebDAV client is an application that can send requests and receive responses using the WebDAV protocol. Content Server currently supports the following WebDAV clients:

- ❖ Microsoft Windows Explorer
- ❖ Microsoft Word 2000, 2002 (XP), and 2003
- ❖ Microsoft Excel 2000, 2002 (XP), and 2003
- ❖ Microsoft PowerPoint 2000, 2002 (XP), and 2003

You can use WebDAV virtual folders in Windows Explorer to manage files that were created in a non-WebDAV client, but you cannot use the native application to check content in to and out of the content server repository.

WORKING WITH FOLDERS

OVERVIEW

This section covers the following topics:

- ❖ [Folders User Interface](#) (page 3-1)
- ❖ [Using Folders](#) (page 3-23)



Note: This guide assumes that your content server is using the Trays layout with the Stellent05 skin, which is the default for Content Server 10gR3.

FOLDERS USER INTERFACE

This section covers the following topics:

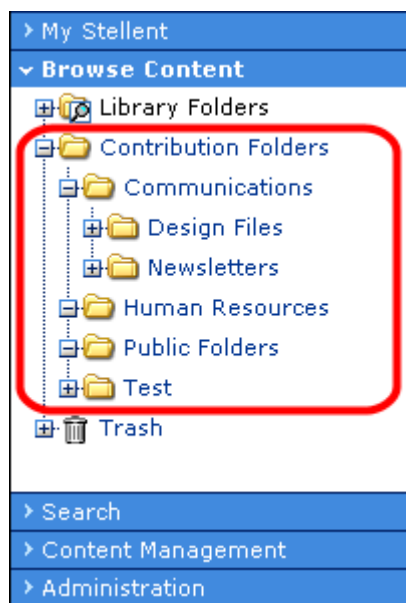
- ❖ [Contribution Folders Link](#) (page 3-2)
- ❖ [Folder Configuration Link](#) (page 3-2)
- ❖ [User Profile Page](#) (page 3-3)
- ❖ [Folder Configuration Page](#) (page 3-4)
- ❖ [Default Information Field Configuration Page](#) (page 3-6)
- ❖ [Revision Information Field Configuration Page](#) (page 3-7)
- ❖ [Folder Exploring Pages](#) (page 3-9)
- ❖ [Trash Exploring Page](#) (page 3-15)
- ❖ [Browsing Window](#) (page 3-15)

- ❖ [Hierarchical Folder Information Page](#) (page 3-17)
- ❖ [Hierarchy Folder Configuration Page](#) (page 3-20)


Contribution Folders Link

When the Folders component is enabled, a new **Contribution Folders** link appears in the Browse Content tray:

Figure 3-1 Folder links in Content Server user interface

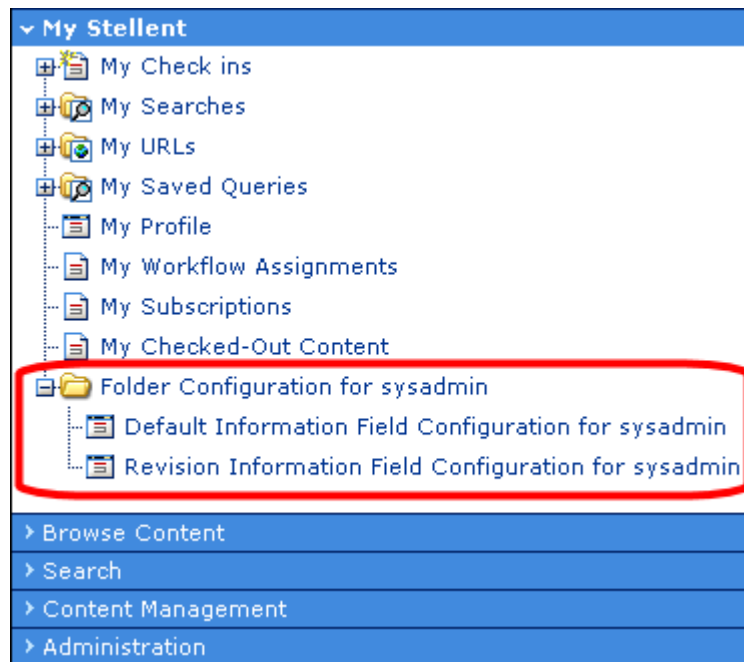


Clicking this link displays the top-level [Folder Exploring Pages](#) (page 3-9).


Expanding this link by clicking its  symbol displays links to the [Folder Exploring Pages](#) (page 3-9) for the top-level folders in the hierarchy.

Folder Configuration Link

When the Folders component is enabled in Content Server, a **Folder Configuration for [User]** link appears in the My Stellent tray:

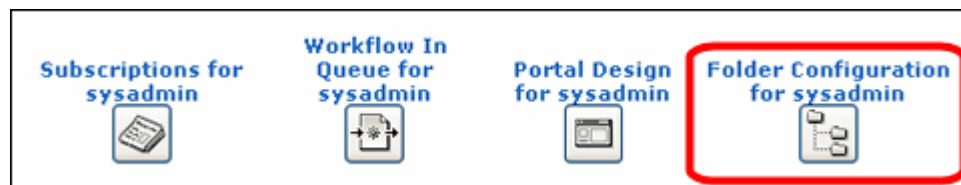
Figure 3-2 Folder Configuration links in Content Server user interface

Clicking this link displays the [Folder Configuration Page](#) (page 3-4).

Expanding this link by clicking its  symbol displays links to the [Default Information Field Configuration Page](#) (page 3-6) and [Revision Information Field Configuration Page](#) (page 3-7).

User Profile Page

When the Folders component is enabled in Content Server, a **Folder Configuration for [User]** button appears on the User Profile page. Clicking this button displays the [Folder Configuration Page](#) (page 3-4).

Figure 3-3 Folder Configuration link on user profile

Folder Configuration Page

The Folder Configuration page enables the user to configure their virtual folder interface. To access this page, do one of the following:

- ❖ Click the [Folder Configuration Link](#) (page 3-2) in the My Stellent tray.
- ❖ Click the **Folder Configuration for [User]** button on the [User Profile Page](#) (page 3-3).

Figure 3-4 Folder configuration

Folder Configuration for sysadmin

Behavioral options affecting how content is displayed and managed.

Content Style

Native


Web Viewable (Browse only)


Hierarchical Virtual Folder Options

Show hidden when browsing

Remove items immediately when deleted

Show only items that user has deleted in trash virtual folder

[Default Information Field Configuration for sysadmin](#) 

[Revision Information Field Configuration for sysadmin](#) 

Feature	Description
Content Style options	<p>Native = The native file is displayed when the user clicks a content item in a folder.</p> <p>Web Viewable (Browse only) = The web-viewable file is displayed when the user clicks a content item in a folder. The user cannot perform any folder operations when this option is selected.</p>
Hierarchical Virtual Folder Options	<p>Show hidden when browsing = When selected, hidden folders and content items are displayed and identified with a dimmed icon; users can still see and work with hidden items. If not selected, hidden folders and content items do not appear in the folder hierarchy.</p> <p>Remove items immediately when deleted = When selected, items are deleted immediately (not moved to the Trash folder). If not selected, deleted items are first moved to the Trash folder.</p> <p>Show only items that user has deleted in trash virtual folder = When selected, only items that the current user has deleted are displayed the Trash folder. If not selected, all items in the Trash folder are displayed.</p>
Update button	Applies any changes to the system.
Reset button	Resets the options to the last saved condition.
Default Information Field Configuration for <i>User</i> button	Displays the Default Information Field Configuration Page (page 3-6).
Revision Information Field Configuration for <i>[User]</i> button	Displays the Revision Information Field Configuration Page (page 3-7).

See also:

- [Defining User Configuration Settings](#) (page 3-24)

Default Information Field Configuration Page

The Default Information Field Configuration page defines the default metadata values to apply to new content (not subsequent revisions) that the user checks in through a virtual folder.



Important: These default settings *only* apply to content that is pasted through the WebDAV interface. They do not apply if new content is added to the folder through the web browser.

To access this page, do one of the following:


- ❖ In the My Stellent tray, expand the **Folder Configuration for [User]** link and click the **Default Information Field Configuration for [User]** link.
- ❖ Click the **Default Information Field Configuration for [User]** button on the [Folder Configuration Page](#) (page 3-4).

Figure 3-5 Default information field configuration

Default Information Field Configuration for sysadmin

Specify the information field defaults that will be applied upon checking in a new content item.

Type	<input type="text" value="ADACCT - Acme Accounting Department"/>	
Author	<input type="text" value="sysadmin"/>	<input type="text" value="sysadmin"/>
Security Group	<input type="text" value="Public"/>	
Folder	<input type="text"/>	<input type="button" value="Browse..."/>
Comments	<input type="text"/>	
Hidden	<input type="text" value="FALSE"/>	
Read Only	<input type="text" value="FALSE"/>	
Trash Delete Date	<input type="text"/>	
Trash Delete Location	<input type="text"/>	<input type="button" value="Browse..."/>
Trash Delete Old Name	<input type="text"/>	
Trash Deleter	<input type="text"/>	
Release Date	<input type="text" value="<\$dateCurrent()\$>"/>	
Expiration Date	<input type="text"/>	

Feature	Description
Information fields	<p>Define the metadata values that will be applied to new content (not subsequent revisions) checked in through a virtual folder if values are not already defined for the folder.</p> <p> Note: These metadata values are applied only on initial check-in; these settings do not affect revisions to existing content.</p> <ul style="list-style-type: none"> • Idoc Script can be used in any of the information fields. • The default Idoc Script in the Release Date field (<code><\$dateCurrent () \$></code>) applies the current release date and time to content item revisions. • Although the Release Date field is required, the content server will automatically use the current date and time if this field is left blank. • You can specify values for the Trash Delete fields, but they will be overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update button	Applies changes to the user's profile.
Reset button	Resets the fields to the last saved values.

See also:

- [Defining User Metadata Defaults for New Content](#) (page 3-25)

Revision Information Field Configuration Page

The Revision Information Field Configuration page defines the default metadata values to apply to revisions (not new content items) that the user checks in through a virtual folder.



Important: These default settings *only* apply to revisions that are pasted through the WebDAV interface. They do not apply if revisions are added to the folder through the web browser.

To access this page, do one of the following:

- ❖ In the My Stellent tray, expand the **Folder Configuration for [User]** link and click the **Revision Information Field Configuration for [User]** link.
- ❖ Click the **Revision Information Field Configuration for [User]** button on the [Folder Configuration Page](#) (page 3-4).

Figure 3-6 Revision information field configuration

Revision Information Field Configuration for sysadmin

Specify the information fields that will be applied upon checking in a revision.

Type	<input type="text"/>
Author	<input type="text"/> <input type="text"/>
Security Group	<input type="text"/>
Folder	<input type="text"/> <input type="button" value="Browse..."/>
Comments	<input type="text"/>
Hidden	<input type="text" value="FALSE"/>
Inhibit Propagation	<input type="text" value="FALSE"/>
Read Only	<input type="text" value="FALSE"/>
Trash Delete Date	<input type="text"/>
Trash Delete Location	<input type="text"/> <input type="button" value="Browse..."/>
Trash Delete Old Name	<input type="text"/>
Trash Deleter	<input type="text"/>
Release Date	<input type="text" value="<\$dateCurrent()\$"/>
Expiration Date	<input type="text"/>

Feature	Description
Information fields	<p>Define the metadata values that will be applied to content revisions (not new content items) checked in through a virtual folder if values are not already defined for the folder.</p> <ul style="list-style-type: none"> • Idoc Script can be used in any of the information fields. • The default Idoc Script in the Release Date field (<\$dateCurrent () \$>) applies the current release date and time to content item revisions. • Although the Release Date field is required, the content server will automatically use the <i>previous revision's</i> release date and time if this field is left blank. • You can specify values for the Trash Delete fields, but they will be overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update button	Applies changes to the user's profile.
Reset button	Resets the fields to the last saved values.

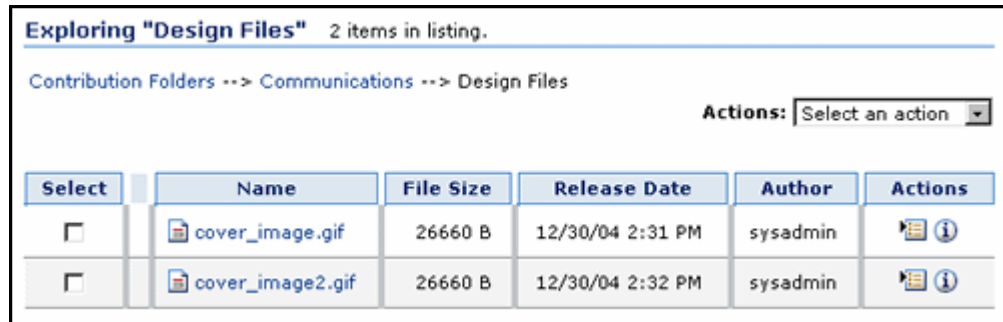
See also:

– [Defining User Metadata Defaults for Revised Content](#) (page 3-26)

Folder Exploring Pages

The folder exploring pages are used to work with virtual folders within the hierarchy. To access a folder exploring page, click the folder link under the [Contribution Folders Link](#) (page 3-2), or click the folder link on another folder exploring page.

Figure 3-7 Folder exploring page






- Note:** You can customize the look and feel of your exploring pages from your user profile page. See the *Content Server User Guide* for details.
- Note:** Some of the fields in the My View search results are unavailable or not applicable when browsing through virtual folders. For example, if you enable Vault File Size as a column in your My View, this field will be populated when performing searches, but it will be blank on folder exploring pages.
- Note:** Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

Feature	Description
Folder path	Displays the folder hierarchy for the current folder. Clicking a link displays the exploring page for that folder.

Feature	Description
Actions list	<p>Classic View—Displays the folder contents in the pre-7.0 format.</p> <p>Thumbnail View—Displays the folder contents as icons.</p> <p>Headline View—Displays the folder contents in a table.</p> <p>My View—Displays the folder contents in your personalized display style. (See the <i>Content Server User Guide</i> for details.)</p> <p>Customize—Opens a configuration page where you can modify the personalized My View display. (See the <i>Content Server User Guide</i> for details.)</p> <p>Select All—Selects all items in the displayed list (i.e., all Select check boxes are selected at once).</p> <p>Unselect All—Unselects all items in the displayed list (i.e., all Select check boxes are cleared at once).</p> <p>Information—Displays the Hierarchical Folder Information Page (page 3-17).</p> <p>New Folder (for contributors only)—Displays the Hierarchy Folder Configuration Page (page 3-20), which is used to create a new folder. This option is not available for guest users.</p> <p>New Content (for contributors only)—Displays the content check-in form, with the current folder's default metadata already filled in. This option is not available for guest users.</p> <p>Move—Displays the Browsing Window (page 3-15), which is used to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function.</p>

Feature	Description
Actions list (continued)	<p>Delete—If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function.</p> <p>Open Web Folder—If the Web Folder feature is enabled, displays the current folder as a WebDAV virtual folder in Windows Explorer.</p>
Select check box	<p>Selected = The folder or content item will be moved or deleted.</p> <p>Clear = The folder or content item is not affected by the move or delete operation.</p>
Name column	<p>Folder link—Displays the exploring page for the folder.</p> <p>File link—Displays the web-viewable file or the File Download dialog, depending on which content style you selected on the Folder Configuration Page (page 3-4).</p>
Size column	Displays the size of the content item.
Date column	Displays the release date of the content item.
Author column	Displays the author of the content item.

Feature	Description
Actions icon for folders ()	<p>Folder Information—Displays the Hierarchical Folder Information Page (page 3-17).</p> <p>Create Shortcut—Displays the Browsing Window (page 3-15), which is used to select the target folder for a shortcut link to the current folder.</p> <p>Move—Displays the Browsing Window (page 3-15), which is used to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function.</p> <p>Delete—If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function.</p>

Feature	Description
Actions icon for content items 	<p>Content Information—Displays the content information page.</p> <p>Check Out—Checks out content item and displays the check-out confirmation page.</p> <p>Check In Similar—Displays the content check-in form, with a number of metadata field already filled in to match the current content item’s metadata.</p> <p>Send link by e-mail—Opens the default mail client and automatically generates the Web-Viewable link and Native File link paths in the message area.</p> <p>Create Shortcut—Displays the Browsing Window (page 3-15), which is used to select the target folder for a shortcut link to the content item.</p> <p>Move—Displays the Browsing Window (page 3-15), which is used to select the target folder for the content item. This action appears only when the system administrator has enabled the Move function.</p> <p>Delete—If the Trash Bin function is enabled, this action moves the content item to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes all revisions of the content item. This action appears only when the system administrator has enabled the Delete function.</p>
Information icon ()	Displays the Hierarchical Folder Information Page (page 3-17) for the virtual folder or the content information page for the content item.

See also:

- [Viewing Virtual Folders](#) (page 3-26)
- [Viewing Content Items](#) (page 3-27)

Trash Exploring Page

The Trash exploring page is used to work with deleted folders and content items. To access this page, click the **Trash** link under the [Contribution Folders Link](#) (page 3-2).



Note: The system administrator must have enabled the Trash Bin function for the Trash exploring page to be available.



Note: You can customize the look and feel of your Trash exploring page from your user profile page. See the *Content Server User Guide* for details.

Figure 3-8 Trash exploring page



With only one exception, the descriptions applicable list options for each of the features on the Trash Exploring page are identical to those for the [Folder Exploring Pages](#) (page 3-9). The Actions icon for both folders and content items includes a Restore option. Selecting the Restore option returns the item to its original parent folder. If the original parent folder has been deleted and is still in the Trash folder, the restored item will be moved to the original folder. If the original folder has been permanently deleted, you will not be able to restore the item.

See also:

- [Deleting Virtual Folders and Their Content](#) (page 3-32)

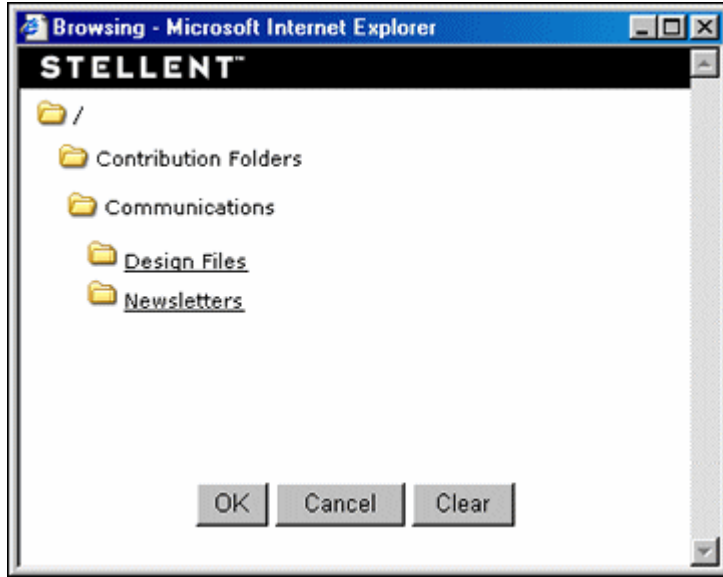
Browsing Window

The Browsing window is used to select a target folder for moving items, creating shortcuts, and specifying local folders. To access this window, do one of the following:

- ❖ Select one or more items and click the Move icon on the [Folder Exploring Pages](#) (page 3-9).

- ❖ Select the Shortcut action on a [Hierarchical Folder Information Page](#) (page 3-17) or Content Information page.
- ❖ Click the Browse button on the Local Folders Page (documented in the *Folders and WebDAV Administration Guide*).

Figure 3-9 Browsing window




Feature	Description
Folder hierarchy	Clicking a folder displays any subfolders.
OK button	Selects the open folder as the target folder. (Lower-level folders may be displayed, but only the open folder is active.)
Cancel button	Closes the Browsing window without selecting a folder.

See also:

- [Checking In Content](#) (page 3-28)
- [Moving Virtual Folders and Content](#) (page 3-30)

Hierarchical Folder Information Page

The Hierarchical Folder Information page is used to view information on a virtual folder. There are two ways to access this page:

- ❖ By selecting **Information** from the Actions dropdown menu on any of the [Folder Exploring Pages](#) (page 3-9).
- ❖ By selecting **Folder Information** from the Actions icon () popup menu for a folder on any of the [Folder Exploring Pages](#) (page 3-9).

The page shows the default metadata for the current virtual folder, and, in the case of deleted folders, information about the delete action.

Figure 3-10 Hierarchical Folder Information page



Hierarchical Folder Information

Actions:

Virtual Folder Name: Design Files
Owner: sysadmin

Folder Information

Title:
Type: DSGN - Design
Security Group: Dsgn
Author:
Release Date: 1/1/05 12:00 AM
Expiration Date:
Comments:
Hidden: FALSE
Inhibit Propagation: FALSE
Read Only: TRUE
Trash Delete Date:
Trash Delete Location:
Trash Delete Old Name:
Trash Deleter:

Feature	Description
Virtual Folder Name field	The name of the virtual folder.
Virtual Folder Owner field	The user name of the folder's owner. This user can change the folder metadata and delete the folder.
Folder Information fields	<p>Display the metadata values for the folder and content items that are checked in through this folder.</p> <p> Note: These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.</p>
Hidden field	<p>True hides the folder. Users will see a dimmed folder icon if they have permission to the folder's security group <i>and</i> they have selected the "Show hidden when browsing" check box on the Folder Configuration Page (page 3-4). Otherwise, the folder will not be visible in the folder hierarchy.</p> <p>False makes the folder visible to all users who have permission to the folder's security group.</p> <p>This field appears only when the system administrator has enabled the Hide/Unhide feature.</p> <p> Note: The Hide/Unhide icons are only visible in the Classic layout. Instead, the Trays and Top menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.</p>
Inhibit Propagation field	<p>True prevents metadata changes to the folder during metadata propagation from a higher-level folder.</p> <p>False includes the folder in metadata propagation from a higher-level folder.</p>

Feature	Description
Read Only field	<p>True prevents renaming, moving, or deleting the folder or content items in that folder. Content can still be checked in and folder metadata can be updated.</p> <p>False makes all folder operations available.</p> <p>This field appears only when the system administrator has enabled the Read Only feature.</p>
Trash Delete Date field	<p>For deleted folders, this field shows when the folder was deleted.</p> <p>This field appears only when the system administrator has enabled the Trash Bin feature.</p>
Trash Delete Location field	<p>For deleted folders, this field shows the location of the folder before it was deleted.</p> <p>This field appears only when the system administrator has enabled the Trash Bin feature.</p>
Trash Delete Old Name field	<p>For deleted folders, this field shows the name of the folder before it was deleted.</p> <p>This field appears only when the system administrator has enabled the Trash Bin feature.</p>
Trash Deleter field	<p>For deleted folders, this field shows the name of the user who deleted the folder.</p> <p>This field appears only when the system administrator has enabled the Trash Bin feature.</p>
Actions list	<p>Update—Displays the Hierarchy Folder Configuration Page (page 3-20).</p> <p>Create Shortcut—Displays the Browsing Window (page 3-15), which is used to select the target folder for a shortcut link to the current folder.</p> <p>Propagate—Propagates the folder's default metadata values to uninhibited subfolders and content items. For further details refer to Metadata Propagation (page 2-4).</p>

See also:

- [Viewing Virtual Folders](#) (page 3-26)

Hierarchy Folder Configuration Page

The Hierarchy Folder Configuration page is used to define or modify virtual folders.

- ❖ To access the Hierarchy Folder Configuration page to add a folder, select **New Folder** from the Actions list on any of the [Folder Exploring Pages](#) (page 3-9).
- ❖ To access the Hierarchy Folder Configuration page to edit an existing folder, open the [Hierarchical Folder Information Page](#) (page 3-17) and select **Update** from the Actions list.

Figure 3-11 Hierarchy Folder Configuration page

Hierarchy Folder Configuration

Specify the name of the virtual folder and information fields values.

Virtual Folder Name

Owner

Folder Information

Title

Type

Security Group

Author

Release Date

Expiration Date

Comments

Hidden

Inhibit Propagation

Read Only



Trash Delete Date

Trash Delete Location

Trash Delete Old Name

Trash Deleter

Feature	Description
Virtual Folder Name field	The name of the virtual folder.
Owner field	The user name of the folder's owner. This user can change the folder metadata and delete the folder.

Feature	Description
Folder Information fields	<p>Define the metadata values for the folder and any content items that are checked in through this folder.</p> <p> Note: These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.</p>
Hidden field	<p>True hides the folder. Users will see a dimmed folder icon if they have permission to the folder's security group <i>and</i> they have selected the "Show hidden when browsing" check box on the Folder Configuration Page (page 3-4).</p> <p>False makes the folder visible to all users who have permission to the folder's security group.</p> <p>This field appears only when the system administrator has enabled the Hide/Unhide feature.</p> <p> Note: The Hide/Unhide icons are only visible in the Classic layout. Rather than icons, the Trays and Top Menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.</p>
Inhibit Propagation field	<p>True prevents metadata changes to the folder during metadata propagation from a higher-level folder.</p> <p>False includes the folder in metadata propagation from a higher-level folder.</p>
Read Only field	<p>True prevents renaming, moving, or deleting the folder or content items in that folder. Content can still be checked in and folder metadata can be updated.</p> <p>False makes all folder operations available.</p> <p>This field appears only when the system administrator has enabled the Read Only feature.</p>

Feature	Description
Trash Delete Date field Trash Delete Location field Trash Delete Old Name field Trash Deleter field	You can specify values for these fields, but they will be overwritten with their current field values at the moment the virtual folder is actually deleted. It is therefore recommended that you leave these fields empty. These fields appear only when the system administrator has enabled the Trash Bin feature.
Save button	Saves the new virtual folder. This button appears only when a new folder is being created.
Submit Update button	Saves the changes to the virtual folder. This button appears only when an existing folder is being modified.
Reset button	Resets the fields to the last saved definition of the virtual folder. This button appears only when an existing folder is being modified.

See also:

– [Defining Virtual Folders](#) (page 3-29)

USING FOLDERS

This section covers the following Folders-related tasks:

- ❖ [Defining User Configuration Settings](#) (page 3-24)
- ❖ [Defining User Metadata Defaults for New Content](#) (page 3-25)
- ❖ [Defining User Metadata Defaults for Revised Content](#) (page 3-26)
- ❖ [Viewing Virtual Folders](#) (page 3-26)
- ❖ [Viewing Content Items](#) (page 3-27)
- ❖ [Checking In Content](#) (page 3-28)

- ❖ [Defining Virtual Folders](#) (page 3-29)
- ❖ [Moving Virtual Folders and Content](#) (page 3-30)
- ❖ [Creating a Shortcut](#) (page 3-31)
- ❖ [Deleting Virtual Folders and Their Content](#) (page 3-32)
- ❖ [Restoring Folders and Content from Trash](#) (page 3-35)
- ❖ [Propagating Metadata](#) (page 3-35)
- ❖ [Searching for Content in Folders](#) (page 3-36)

Defining User Configuration Settings

Use the following procedure to define your virtual folder configuration settings:

1. Open the **My Stellent** tray.
2. Click **Folder Configuration for [User]**.
The [Folder Configuration Page](#) (page 3-4) is displayed.
3. Select a **Content Style** option.
4. If the Hide/Unhide feature is enabled, select or clear the “Show hidden when browsing” check box.
5. If the Trash Bin function is enabled, select or clear the following check boxes:
 - Remove items immediately when deleted
 - Show only items that user has deleted in trash virtual folder
6. Click **Update**.

See also:

- [Folder Configuration Page](#) (page 3-4)

Defining User Metadata Defaults for New Content

Use the following procedure to define default metadata values for new content checked in by a particular user.



Important: Each user should follow this procedure to define their default metadata before using WebDAV to check in content through a virtual folder. This is recommended to ensure that content items do not all have the same metadata, and to ensure that content can be checked in if required values are not defined for the folder or in the system defaults. Each WebDAV contributor should repeat this procedure after a required metadata field is added to the content server or after accounts are enabled.



Note: These defaults will be applied to any new content item checked in through a virtual folder *only* if a value is not defined for the folder. See [Default Metadata Values](#) (page 2-3) for more information.



Note: These metadata values are applied only on initial check-in of a content item; these settings do not affect revisions to existing content. See [Defining User Metadata Defaults for Revised Content](#) (page 3-26) to set metadata defaults for revisions.

1. Open the **My Stellent** tray.
2. Expand the **Folder Configuration for [User]** link.
3. Click **Default Information Field Configuration for [User]**.

The [Default Information Field Configuration Page](#) (page 3-6) is displayed.

4. Specify the default values to be applied to new content upon check-in.



Note: Idoc Script can be used in any information field.

5. Click **Update**.

See also:

- [Default Metadata Values](#) (page 2-3)
- [Default Information Field Configuration Page](#) (page 3-6)
- [Defining User Metadata Defaults for Revised Content](#) (page 3-26)

Defining User Metadata Defaults for Revised Content

Use the following procedure to define default metadata values for revised content checked in by a particular user.



Note: These defaults will be applied to any content item revision checked in through a virtual folder *only* if a value is not defined for the folder. See [Default Metadata Values](#) (page 2-3) for more information.



Note: These metadata values are applied only upon check-in of a revision; these settings do not affect new content items. See [Defining User Metadata Defaults for New Content](#) (page 3-25) to set metadata defaults for new content.

1. Open the **My Stellent** tray.
2. Expand the **Folder Configuration for User** link.
3. Click **Revision Information Field Configuration for User**.

The [Revision Information Field Configuration Page](#) (page 3-7) is displayed.

4. Specify the default values to be applied to revised content upon check-in.



Note: Idoc Script can be used in any information field.

5. Click **Update**.

See also:

- [Default Metadata Values](#) (page 2-3)
- [Revision Information Field Configuration Page](#) (page 3-7)
- [Defining User Metadata Defaults for New Content](#) (page 3-25)

Viewing Virtual Folders

Use the following procedure to view a virtual folder from a content server web page:

1. Open the **Browse Content** tray.
2. Click the **Contribution Folders** link.

A [folder exploring page](#) (see page 3-9) is displayed.




Note: Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

3. Click folder links to drill down to the desired folder.



Note: Some of the fields in the My View search results are unavailable or not applicable when browsing through virtual folders. For example, if you enable Vault File Size as a column in your My View, this field will be populated when performing searches, but it will be blank on folder exploring pages.

4. To view the [Hierarchical Folder Information Page](#) (page 3-17) for a folder, choose **Information** from the Actions list, or choose **Folder Information** from the Actions icon () popup menu.
5. If the Hide/Unhide feature is enabled, you can hide the folder by selecting **Hide** from the Actions list.
6. If the Web Folder feature is enabled and you are using Internet Explorer 5.0 or higher, you can view the folder in Windows Explorer by selecting **Open Web Folder** from the Actions list.

See also:

- [Folder Exploring Pages](#) (page 3-9)
- [Hierarchical Folder Information Page](#) (page 3-17)



Viewing Content Items

Use the following procedure to view content items from a virtual folder:

1. View the [exploring page](#) (see page 3-9) for the virtual folder that contains the content item.



Note: Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

2. To view the content information for a content item, click the **Information** icon () , or choose **Content Information** from the Actions icon () popup menu.


3. To view a file, click the file link in the Name column.
 - If you selected the Native option under Content Style on the [Folder Configuration Page](#) (page 3-4), the File Download screen enables you to open or save the file.
 - If you selected the Web Viewable (Browse only) option under Content Style on the [Folder Configuration Page](#) (page 3-4), the web-viewable file is displayed.

See also:

- [Folder Exploring Pages](#) (page 3-9)
- [Folder Configuration Page](#) (page 3-4)

Checking In Content

Use the following procedure to check in a file through a virtual folder:

1. View the [exploring page](#) (see page 3-9) for the virtual folder you want to check the content item into.
2. Display the content check-in form using one of the following methods:
 - Select **New Content** from the Actions list.
 - Click the Actions icon () for an existing content item and select **Check In Similar**.

The content check-in form is displayed, with the folder's default metadata already filled in.

3. Enter the required metadata and any optional metadata for the content item.
4. Enter the path and file name of the **Primary File**.



Note: You cannot check two files with the same file name into the same folder.

5. In the **Inhibit Propagation** field, specify whether the content item should be included during metadata propagation.
 - Set the value to *false* if propagated metadata should be applied to the content item.
 - Set the value to *true* if the content item's metadata should remain unchanged during metadata propagation.
6. Click **Check In**.



Note: If the number of content items in the folder exceeds the limit set by the system administrator, you will get an error message and will not be able to check in the new content item.

See also:

– [Folder Exploring Pages](#) (page 3-9)

Defining Virtual Folders

Use the following procedure to add or modify a virtual folder:



Note: To add a virtual folder, you must be a contributor. To modify a virtual folder, you must have Admin permission to the folder's security group.

1. Open the [Hierarchy Folder Configuration Page](#) (page 3-20):
 - a. Open the [Hierarchical Folder Information Page](#) (page 3-17).
 - b. Select Update from the Actions list.

The Add/Edit Hierarchy Folder Configuration page is displayed.

2. Enter a name for the folder in the **Virtual Folder Name** field.



Note: Neither the forward (/) or backward (\) slash may be used in a folder name.

3. Specify an owner for the virtual folder.
4. Specify any additional metadata values for the folder.
 - These metadata values will be applied to content items upon initial check-in to this folder; these settings do not affect revisions to existing content in the folder.
 - These metadata values override any values inherited from the parent folder.
 - Idoc Script can be used in any information field.
5. In the **Inhibit Propagation** field, specify whether the folder should be included when metadata is propagated from a higher-level folder.
 - Set the value to *false* if the folder should be included in metadata propagation.
 - Set the value to *true* if the folder's metadata should remain unchanged during metadata propagation.
6. Click **Save** (new folder) or **Submit Update** (existing folder).

The [exploring page](#) (see page 3-9) for the virtual folder is displayed.




Note: If the number of folders exceeds the limit set by the system administrator, you will get an error message and will not be able to create the new folder.

See also:

- [Folder Exploring Pages](#) (page 3-9)
- [Hierarchical Folder Information Page](#) (page 3-17)
- [Hierarchy Folder Configuration Page](#) (page 3-20)

Moving Virtual Folders and Content

Use the following procedure to move virtual folders and content items from one virtual folder to another:

1. View the [exploring page](#) (see page 3-9) for the virtual folder that contains the folders and/or content items you want to move.
2. Select the check boxes next to the folders and/or content items to be moved.
3. Click the Actions icon () and select **Move**.

The [Browsing Window](#) (page 3-15) is displayed.

4. Click the folder to move the selected items to. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
5. Click **OK**.

The selected items are moved to the target folder.



Note: If you move a file from one folder to another (either through the Folders user interface or WebDAV), the copy of that file in the local folder associated with the source folder is not deleted. For example, if you have a folder *WebSite*, files in this folder are automatically copied to its local folder, say, *C:/Website/*. If you now move a file from the folder *WebSite* to another folder, say, *Intranet*, with *Z:/Intranet/* as the local folder, then the file copy in *C:/Website/* is not deleted.

See also:

- [Folder Exploring Pages](#) (page 3-9)
- [Browsing Window](#) (page 3-15)


Creating a Shortcut

Use either of the following procedures to create a shortcut link to a virtual folder or content item in the folder hierarchy. You can create shortcuts in two ways:

- ❖ [Creating a Shortcut from an Exploring Page](#)
- ❖ [Creating a Shortcut from a Folder Information Page or Content Information Page](#)

Creating a Shortcut from an Exploring Page

Use the following procedure to create a shortcut from an exploring page:

1. View the [exploring page](#) (see page 3-9) for the virtual folder that contains the folder or content item for which you want to create a shortcut.
2. Click the Actions icon () and select **Create Shortcut**.
The [Browsing Window](#) (page 3-15) is displayed.
3. Click the folder where you want to create the shortcut link. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
4. Click **OK**.

A shortcut link is created in the target folder.

Creating a Shortcut from a Folder Information Page or Content Information Page

Use the following procedure to create a shortcut from a folder information page or content information page:

1. View the [Hierarchical Folder Information Page](#) (page 3-17) or content information page for the folder or content item for which you want to create a shortcut.
2. Select **Create Shortcut** from the Actions list.
The [Browsing Window](#) (page 3-15) is displayed.
3. Click the folder where you want to create the shortcut link. (You may need to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
4. Click **OK**.

A shortcut link is created in the target folder.

See also:

- [Folder Exploring Pages](#) (page 3-9)
- [Browsing Window](#) (page 3-15)
- [Hierarchical Folder Information Page](#) (page 3-17)

Deleting Virtual Folders and Their Content

This section covers the following topics:

- ❖ [About Deleting Folders and Content](#) (page 3-32)
- ❖ [Deleting a Folder or Content Item](#) (page 3-34)
- ❖ [Permanently Deleting Folders and Content from Trash](#) (page 3-34)

About Deleting Folders and Content



Caution: When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. When you delete a content item, all revisions of that content item are deleted. **Be extremely careful when deleting folders and content items so that you do not accidentally delete content that you want to keep.**

Keep the following in mind when deleting virtual folders and content items:

- ❖ When you delete folders and content items from the Folders hierarchy, the action that occurs depends on whether the Trash Bin function is enabled and whether you have chosen to use the Trash Bin function in your user profile:

Trash Bin function enabled by system administrator	“Remove items immediately when deleted” check box on the Folder Configuration Page (page 3-4)	Result of Delete Action
Enabled	Cleared	Deleting a folder or content item moves it to the Trash folder. Items can be permanently deleted or restored from the Trash folder.
Enabled	Selected	Deleting a folder or content item permanently deletes it. Items cannot be restored.

Trash Bin function enabled by system administrator	“Remove items immediately when deleted” check box on the Folder Configuration Page (page 3-4)	Result of Delete Action
Disabled	Selected or cleared	Deleting a folder or content item permanently deletes it. Items cannot be restored.

- ❖ To delete a content item, you must have Delete permission to the content item’s security group.
- ❖ To delete a virtual folder, you must be the owner of the folder or a user with Delete permission to the folder’s security group.
- ❖ If a folder contains any content items or subfolders that you do not have permission to delete, you will not be able to delete the folder.
- ❖ If you delete a system-level folder, the folder is actually disabled rather than being deleted. Only the system administrator can reactivate a system-level folder.



Tech Tip: If WebDAV functionality is set up on your system, the following sequence of events could cause unexpected results:

1. Check in content item “A”.
2. Check in a revision to content item “A” with a different file name. (This would have to be done from the content server’s content information page; it cannot be done through a WebDAV client.)
3. Check content item “B” into the same folder with the same file name as the first revision of content item “A”.
4. Delete the last revision of content item “A”. (This would have to be done from the content information page.)

The result is that two content items with the same file name will be in the folder, but only one of them will appear when viewed in a WebDAV client.

Deleting a Folder or Content Item




Caution: When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. When you delete a content item, all revisions of that content item are deleted. **Be extremely careful when deleting folders and content items so that you do not accidentally delete content that you want to keep.**



Note: To delete a content item, you must have Delete permission for the security group of that content item. To delete a folder, you must be the Owner of the folder or have Delete permission for the folder's security group, and you must have Delete permission for the security groups of all subfolders and content items within the folder.

Use the following procedure to delete folders and content items:

1. View the [exploring page](#) (see page 3-9) for the virtual folder that contains the folder or content item you want to delete.
2. Select the check box next to each folder and content item to be deleted.
3. Click the Actions icon () and select **Delete**.


You are asked to confirm that you want to remove the selected items.

4. Click **OK**.

All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are deleted. Whether or not they can be restored depends on how Folders has been set up (see table on page 3-32).

Permanently Deleting Folders and Content from Trash

Use the following procedure to permanently delete items from the Trash folder:

1. View the [exploring page](#) (see page 3-9) for the Trash folder.
2. Select the check box next to each folder and content item to be permanently deleted.
3. Click the Actions icon () and select **Delete**.


You are asked to confirm that you want to remove the selected items.

4. Click **OK**.

All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are permanently deleted from the content server. **They cannot be restored.**

Restoring Folders and Content from Trash

Use the following procedure to restore an item from the Trash folder to its original parent folder:

1. View the [exploring page](#) (see page 3-9) for the Trash folder.
2. Click the Actions icon () and select **Restore**. (You can only restore one item at a time.)
3. Click **OK**.

The item is restored to its original parent folder.



Important: If the original parent folder has been deleted and is still in the Trash folder, the restored item will be moved to the original folder. If the original folder has been permanently deleted, you will not be able to restore the item.

Propagating Metadata

Use the following procedure to copy metadata from a folder to its subfolders and content items:



Caution: This procedure replaces metadata values for folders and content items that are not identified as “inhibited,” and there is no “undo.” **Be extremely careful when propagating metadata so that you do not accidentally change values you meant to keep.**



Caution: The system administrator selects which metadata fields are included in propagation. This is a system-wide setting. Make sure that you know which metadata fields are enabled for propagation before launching the process.



Important: You can only propagate metadata for a folder if you are the owner or administrator of that folder.



Note: Empty metadata field values may not be propagated, depending on how the system has been set up.

1. Display the [Hierarchical Folder Information Page](#) (page 3-17) for the folder from which you want to propagate metadata.
2. Select **Propagate** from the Actions list.

The metadata values defined for the current folder are copied to any uninhibited subfolders and content items within those folders.



Note: Only content items and folders for which you have Write permission to the security group will be affected.

See also:

- [Hierarchical Folder Information Page](#) (page 3-17)
- [Checking In Content](#) (page 3-28)
- [Defining Virtual Folders](#) (page 3-29)

Searching for Content in Folders

If Folders is configured to support searching in a folder and its subfolders, then follow this procedure to search for content items in Folders:

1. Click **Search** in the content server.

The Search page is displayed with a Browse button in the Results Options section.

2. Click **Browse** to find and select the folder, including its subfolders, that you want to search.
3. Specify other parameters on the Search page as needed, then click **Search**.

WORKING WITH WEBDAV

OVERVIEW

This section covers the following topics:

- ❖ [WebDAV Interface](#) (page 4-1)
- ❖ [Using WebDAV](#) (page 4-3)

WEBDAV INTERFACE

This section covers the following topics:

- ❖ [Virtual Folders](#) (page 4-1)
- ❖ [User Interface](#) (page 4-2)

Virtual Folders



Note: In Content Server, the WebDAV interface is based on the hierarchical Folders interface. See [Chapter 3 \(Working With Folders\)](#) for more information.

The WebDAV interface to a content server repository is set up as “virtual folders.” Each folder contains the content items that have the same numerical “Folder” value, which is assigned automatically upon creation of the folder.

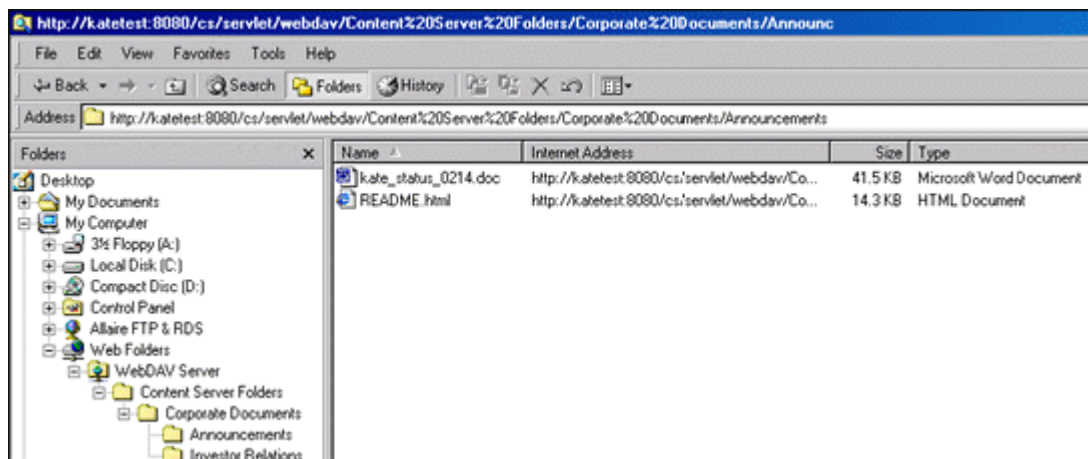
You can work with content items and virtual folders in much the same way you would work with files and folders in a file system. However, typical tasks you perform on files in

a file system may have a different effect when you perform them on files in a WebDAV virtual folder. For example, opening a file from a WebDAV virtual folder also checks the content item out of the content server.

The user logins and security controls in Content Server and the Folders component also apply to content that is managed using WebDAV clients. For example, if you have Read permission for a content item, you will be able to view the file, but you will not be able to check in a new revision of the file.

Figure 4-1 below shows how a typical set of WebDAV virtual folders would look in Windows Explorer:

Figure 4-1 WebDAV virtual folders in Windows Explorer



User Interface

Some tasks related to WebDAV can be performed from Folders web pages. The following user pages are described in the section about [working with the Folder component](#) (see chapter 3):

- ❖ [Folder Configuration Page](#) (page 3-4)
- ❖ [Default Information Field Configuration Page](#) (page 3-6)
- ❖ [Revision Information Field Configuration Page](#) (page 3-7)
- ❖ [Hierarchy Folder Configuration Page](#) (page 3-20)

USING WEBDAV

This section covers the following tasks that you perform from a WebDAV client:

- ❖ [Setting Up a Web Folder](#) (page 4-3)
- ❖ [Working with Virtual Folders](#) (page 4-3)
- ❖ [Working with Content](#) (page 4-5)
- ❖ [Displaying Web Pages](#) (page 4-12)

In addition, some tasks related to WebDAV can be performed from Folders component web pages. The following user tasks are described in the section about [working with the Folder component](#) (see chapter 3):

- ❖ [Defining User Configuration Settings](#) (page 3-24)
- ❖ [Defining User Metadata Defaults for New Content](#) (page 3-25)
- ❖ [Defining User Metadata Defaults for Revised Content](#) (page 3-26)

Setting Up a Web Folder

Refer to the *Folders and WebDAV Installation Guide* for instructions on setting up a WebDAV web folder on a client machine.

Working with Virtual Folders

This section covers these tasks:

- ❖ [Viewing Virtual Folders](#) (page 4-4)
- ❖ [Creating a New Virtual Folder](#) (page 4-4)
- ❖ [Renaming a Virtual Folder](#) (page 4-4)
- ❖ [Deleting a Virtual Folder](#) (page 4-4)
- ❖ [Restoring a Virtual Folder](#) (page 4-5)
- ❖ [Setting Default Folder Metadata](#) (page 4-5)

Viewing Virtual Folders

Virtual folders can be viewed in Windows Explorer or from the Open or Save As dialog in a WebDAV client. The virtual folders can be accessed from:

Desktop—My Network Places—Web Folder Name

or

Desktop—My Computer—Web Folders—*Web Folder Name*

Creating a New Virtual Folder

You can create a new virtual folder in Windows Explorer or from the Open or Save As dialog in a WebDAV client. Select an existing web folder, right-click, and choose **New—Folder** from the popup menu.

- ❖ After you create a new folder, set the default metadata. See [Setting Default Folder Metadata](#) (page 4-5).
- ❖ You cannot create a new folder at the system level.



Note: The following characters cannot be used in the folder name:

- Forward slash (/)
- Backward slash (\)
- Number sign (#)

Renaming a Virtual Folder

You can rename a virtual folder in Windows Explorer or from the Open or Save As screen in a WebDAV client. Browse to the folder you want to rename, right-click, and choose **Rename** from the popup menu.



Note: The following characters cannot be used in the folder name:

- Forward slash (/)
- Backward slash (\)
- Number sign (#)

Deleting a Virtual Folder

You can delete a virtual folder from Windows Explorer or from the Open or Save As screen in a WebDAV client. Browse to the folder you want to delete, right-click, and choose **Delete** from the popup menu (or press the Delete key).



Caution: When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. **Be extremely careful when deleting folders so that you do not accidentally delete content that you want to keep.**

See [Deleting Virtual Folders and Their Content](#) (page 3-32) for detailed information on security and the Trash Bin function.

Restoring a Virtual Folder

If the Trash Bin function is enabled, you can restore a virtual folder from Windows Explorer using one of the following methods:

- ❖ Drag and drop the folder from the Trash folder to another virtual folder.
- ❖ Cut the folder from the Trash folder and paste it into another virtual folder.

Setting Default Folder Metadata

Use the following procedure to define the metadata defaults for a virtual folder:

1. Open the [Hierarchy Folder Configuration Page](#) (page 3-20) for the folder.
2. Enter the default metadata for the folder.
3. Click **Update**.

Working with Content

This section covers the following topics:

- ❖ [Checking In Content](#) (page 4-6)
- ❖ [Checking Out Content](#) (page 4-7)
- ❖ [Viewing Content](#) (page 4-8)
- ❖ [Modifying Content](#) (page 4-8)
- ❖ [Deleting Content](#) (page 4-9)
- ❖ [Restoring Content](#) (page 4-10)
- ❖ [Copying Content](#) (page 4-10)
- ❖ [Moving Content](#) (page 4-11)



Note: Files that were not created in a supported WebDAV client can be checked in, viewed, deleted, copied, and moved through WebDAV virtual folders in Windows Explorer, but they must be checked out through the browser interface.

Checking In Content

Placing a file in a virtual folder checks the file into the content server repository. Keep the following points in mind when checking in files through WebDAV:

- ❖ You cannot check two files with the same file name into the same folder.
- ❖ If an error occurs during check-in, a value might not have been defined for a required field. Make sure that you have defined user default values for required fields on the [Default Information Field Configuration Page](#) (page 3-6).
- ❖ If the Save As screen appears when you attempt to place a file in a virtual folder, you do not have Write privileges to the security group defined for that folder. You must select a different virtual folder, or save the file on your hard drive and then check in the file through a web browser where you can select the appropriate metadata.
- ❖ The title of the checked-in content item depends on the value of the WebDAV title allocation configuration parameter as set by the system administrator. The title will be either the file name (with or without the file extension) or the [default title metadata](#) value defined for the folder that the content item is dropped into. Content item titles are assigned as follows:
 - If the WebDAV title inheritance configuration setting is disabled (the default value), the file name *without* the file extension is used as the title (for example, “monthly_report”). This is the naming convention regardless of whether a default title metadata value has been defined for the folder.
 - If the WebDAV title inheritance configuration setting is enabled and no default title metadata value has been defined for the folder, the file name *with* the file extension is used as the title (for example, “monthly_report.doc”).
 - If the WebDAV title inheritance configuration setting is enabled and a [default title metadata value](#) has been defined for the folder, the defined name is used as the title (for example, “Monthly Report”).
- ❖ In most WebDAV configurations, an open file is not checked into the content server repository until it is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save creates a new revision in the content server.

- ❖ If your file has double-byte characters (for example, Chinese, Japanese, or Korean) in the file name and the content server is running on a Western European operating system, you may not be able to check in the file through WebDAV due to a limitation in Microsoft's WebDAV clients. Eliminate double-byte characters from the file name or check in the file through the web browser interface of the content server.
- ❖ Do not use the number sign (#) in your file name. The number sign (#) is an illegal WebDAV character.

Check-In Through Windows Explorer

Use either of the following methods to check in a content item through Windows Explorer:

- ❖ Drag and drop a file from your hard drive or another network drive into a virtual folder.
- ❖ Copy a file from your hard drive or another network drive and paste it into a virtual folder.

Check-In Through Microsoft Office

Use the following method to check in a content item through a Microsoft Office application (Word, Excel, PowerPoint, etc.):

- ❖ Save a file in a virtual folder and then close the file.

Checking Out Content

Opening a file from a virtual folder checks out the file from the content server repository, and locks the file so that other users can only view it. Any of the following actions will check out a content item:

Check-Out Through Windows Explorer

Use the following method to check out a content item through Windows Explorer:

- ❖ Open a file from a virtual folder.

Check-Out Through Microsoft Office

Use the following method to check out a content item through a Microsoft Office application (Word, Excel, PowerPoint, etc.):

- ❖ Open a file from a virtual folder.



Note: The Undo Check Out option cancels the content item check-out. This option is displayed only if the content item is checked out, and it is only available to the user who checked out the content item.

Viewing Content

You can view a content item without affecting the revision number by opening the content item and then closing the file without saving it. This results in an “Undo Checkout” rather than a check-in of a new revision.



Caution: If you save any changes to a file opened from a WebDAV folder, you will create a new revision.

Modifying Content

Modifying a file in a virtual folder checks in a new revision of the content item. Use one of the following procedures to modify a content item.

Modifying a File in a WebDAV Client Format

Use the following procedure to modify a file that is in a WebDAV client format (Word, Excel, PowerPoint, etc.):

1. Open the file from a virtual folder, either through Windows Explorer or from a WebDAV client.

The file is checked out of the content server repository.

2. Make changes to the file.
3. Save the changes.
4. Close the file.

The file is checked in as a new revision.



Note: In most WebDAV configurations, an open file is not checked into the content server repository until it is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save, including automatic saves, creates a new revision in the content server.

Modifying a File in a Non-WebDAV Client Format

Use the following procedure to modify a file that is not in a WebDAV client format:

1. Copy the file from a virtual folder to a temporary location. Make sure that you do not change the file name.
2. Make changes to the file.
3. Save the changes and close the file. Make sure that you use the same file name.
4. Move or copy the file to its original virtual folder.

The file is checked in as a new revision.

Deleting Content

Deleting a file from a virtual folder deletes all revisions of the content item. Any of the following actions will delete a content item:



Note: See [Deleting Virtual Folders and Their Content](#) (page 3-32) for detailed information on security and the Trash Bin function.

Deleting Through Windows Explorer

Use the following method to delete a content item through Windows Explorer:

- ❖ Delete a file from a virtual folder.

Deleting Through Microsoft Office

Use the following method to delete a content item through a Microsoft Office application (Word, Excel, PowerPoint, etc.):

- ❖ Delete a file from a virtual folder within the Open or Save As screen.



Tech Tip: If WebDAV functionality is set up on your system, the following sequence of events could cause unexpected results:

1. Check in content item “A”.
2. Check in a revision to content item “A” with a different file name. (This would have to be done from the content server’s content information page; it cannot be done through a WebDAV client.)
3. Check content item “B” into the same folder with the same file name as the first revision of content item “A”.
4. Delete the last revision of content item “A”. (This would have to be done from the content information page.)

The result is that two content items with the same file name will be in the folder, but only one of them will appear when viewed in a WebDAV client.

Restoring Content

If the Trash Bin function is enabled, you can restore content items from Windows Explorer using one of the following methods:

- ❖ Drag and drop the file from the Trash folder to another virtual folder.
- ❖ Cut the file from the Trash folder and paste it into another virtual folder.

Copying Content

Copying a file from one virtual folder to another will check in the copied file as a new content item, or, if the file has the same file name as an existing file in the target folder, it will check in a new revision. The new content item or new revision is stored with the file name and metadata of the latest revision of the source. Any of the following actions will copy a content item from one virtual folder to another:

Copying Through Windows Explorer

Use the following method to copy a content item through Windows Explorer:

- ❖ Right-drag a file from a virtual folder to another, release, and select **Copy Here**.
- ❖ Copy a file from a virtual folder and paste it into another virtual folder.

Copying Through Microsoft Office

Use the following method to copy a content item through a Microsoft Office application (Word, Excel, PowerPoint, etc.):

- ❖ Open a file from a virtual folder, select **File—Save As**, select a different virtual folder, click **OK**, and close the file.



Important: If the **Save As** dialog appears twice, you do not have Write privileges to the security group defined for the virtual folder. You must select a different virtual folder, or save the file on your hard drive and then check in the file through a web browser where you can select the appropriate metadata.

Moving Content

Any of the following actions will move a content item from one virtual folder to another:

Moving Through Windows Explorer

Use the following method to move a content item through Windows Explorer:

- ❖ Drag and drop a file from one virtual folder to another.
- ❖ Cut a file from a virtual folder and paste it into another virtual folder.

Moving Through Microsoft Office

Use the following method to move a content item through a Microsoft Office application (Word, Excel, PowerPoint, etc.):

- ❖ Open a file from a virtual folder, select **File—Save As**, select a different virtual folder, click **OK**, and close the file.



Note: Moving a file to a different virtual folder does not change the metadata. To apply the new parent folder's metadata, you can use the [Metadata Propagation](#) (page 2-4) function.

Displaying Web Pages

You can access the content server virtual folder web pages through Windows Explorer rather than through a web browser.

Configuring Windows Explorer

To be able to display web pages through Windows Explorer, the application must be set to display the full path in the title bar:

1. In Windows Explorer, select **Tools—Folder Options**.
The Folder Options screen is displayed.
2. Open the View tab.
3. Under Files and Folders, select the “Display the full path in title bar” check box.
4. Click **OK**.

Displaying a Web Page

Use the following procedure to display a content server web page from Windows Explorer:

1. Make sure that you have a Web Folders folder displayed in Windows Explorer.
This folder can be in a number of possible locations, but it is usually under My Computer.



Note: If the Web Folders folder is not displayed, access your contribution folders under My Network Places. You might have to do this a few times for the Web Folders folder to appear.

2. In the right pane of Windows Explorer, double-click the folder for which you want to display the web page.
3. Click in the **Address** bar at the top of the screen.
4. Press the **Enter** key.

The exploring page for the folder is displayed.



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* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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