



**Blackboard**  
Blackboard Content System™

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# User Manual

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## INTRODUCTION

### Overview

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Welcome to the *Blackboard Content System*! The *Blackboard Content System* is a feature-rich, fully integrated system for storing, sharing, and publishing content. This manual is a reference for all end-users of the *Blackboard Content System* including students, teachers, librarians, and other members of an educational community.

### About the *Blackboard Content System*

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The *Blackboard Content System* allows users to manage learning content, digital assets, and ePortfolios in an enterprise learning environment. It is fully integrated with the *Blackboard Learning System* and the Blackboard Portal System—making use of a similar interface as well as creating repositories for *Blackboard Learning System* courses and users.

### About the *Blackboard Learning System* and the *Blackboard Community System*

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The *Blackboard Learning System* is a robust course management system (CMS) that is licensed with several different options. The *Blackboard Learning System* includes not only the course management system and advanced integration and data management tools. Adding the *Blackboard Community System* introduces a customizable portal designed to support several different groups of users with specialized content.

### About Blackboard Inc.

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Blackboard Inc. develops, licenses, and supports enterprise software applications for the global education market. Working in concert with over 2,600 client-institutions and dozens of technology partners, Blackboard is committed to enabling client innovation and enriching the educational experience through information technology and offers the industry's leading e-Education platform. Blackboard's suite of enterprise applications includes the *Blackboard Learning System*™, *Blackboard Community Portal System*™, and *Blackboard Transaction System*™. Through the use of Building Blocks SM technology, Blackboard's suite of applications has been architect and designed to deliver a flexible, customizable, and seamlessly integrated operating environment for e-Education.

### Using this manual

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This manual is best read as a reference, rather than as a book read cover to cover. If the manual is viewed online, the embedded links enable the user to navigate quickly through topics. For readers that prefer to print out and read a paper copy of the manual, refer to the table of contents to locate topics that are referenced in the text. To make this manual easier to use a number of conventions appear throughout. These conventions are detailed in the table below.

SYMBOL	DESCRIPTION
<b>Bold type</b>	A button or field name.
[r]	Required field.
Courier Font	Text that users should type.
Steps	Tasks users should perform.

## CHAPTER 1—ORGANIZE AND MANAGE CONTENT

### About organizing and managing content

---

The Content Collection allows users to store, share, and publish content within personal user folders, course folders and institution folders. This chapter explains how to organize and manage content in ways that are beneficial to them and to other users in the system.

### In this chapter

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This chapter includes information on the following topics:

TOPIC	DESCRIPTION
<a href="#">Organize content in folders</a>	Describes how content is organized within folders.
<a href="#">Organize folder permissions</a>	Explains how folder permissions are managed.
<a href="#">Tools for sharing and finding content</a>	Describes tools available for searching and sharing content.
<a href="#">Recycle Bin</a>	Describes the Recycle Bin that contains any items or folders that have been removed from the Content System.
<a href="#">Unique ID Tool</a>	Describes the Unique ID Tool that reconciles the paths to files and folders with unique IDs for those Content System items.
<a href="#">Organize the user folder</a>	Explains how to organize content and permissions in the username folder.

## ORGANIZE CONTENT IN FOLDERS

### About Organizing Content

---

Before adding any content to the Content Collection, users should plan out how they will manage their content. This allows them to organize content in a way which best meets their individual needs.

Files in the Content Collection are organized in a tree structure of nested folders up to, and including, the content area level. This means that each folder may contain other subfolders and files. The term “items” refers to files and folders.

A folder stores both files and other folders. Folders are automatically available to the user who added a folder but must be shared if other users are to view the folder and its contents. It is important to remember that all folders are contained within other folders up to the root (/) folder. Root folders are folders in which all other folders are placed. Content areas, such as Users, Courses, Institution, and Library, are simply folders stored under the root folder.



**NOTE:** The system does not allow subfolders with the same name in a single parent folder. For example, two folders named Group Projects may not be created in the top-level of the username folder. The system also does not allow files with the same name to exist in a folder.

### Private content space and Public content space

---

Creating separate folders for personal content (private space) and folders that are available to other users (public space) is very helpful. This method allows the user to have certain folders available only to them, where they can store personal content. For example, one personal folder may contain papers and projects that are in progress, while another contains professional content that is not ready to be shared, such as resumes and cover letters for jobs. Additional permissions for these personal folders are not granted to anyone else.

When a document is ready to be shared, it may be copied or moved to a public folder. For example, if an Instructor is working on a course document he or she can create the draft in a personal folder, and then move it to a shared folder when it is complete. The shared folder is shared with all users enrolled in the class (public space that is set to be available to only course members), and allows for collaboration.

### Creating a private folder

---

A private folder is created in the same way as other folders in the Content Collection, through the **Add Folder** option. The permissions granted on the folder determine whether or not it is private. In the username folder, a private folder is a subfolder that is not shared with any other users. A user may create a subfolder in his or her username folder and not grant other users permissions to it.

### Creating a Public folder

---

Similar to private folders, public folders are created in the same way as other folders, using the **Add Folder** option. The permissions granted on a folder determine whether or not it becomes available to multiple users and groups of users. Any user with Manage permissions may share the item with a wider audience. In a username folder, a public folder may be created and shared with a group of users collaborating on a project.

## ORGANIZE FOLDER PERMISSIONS

### Organizing Folders

---

It is helpful if users organize folders in a way that allows them to manage permissions by folder, rather than by file. For example, create a folder that contains all files used in a group project. This way the entire folder may be shared with the group members, rather than trying to manage permissions on separate items stored in different folders.

Only Read permission should be added to a top-level folder, for example the username folder. Anytime a permission is added or changed on the top-level folder, check any subfolders or files designated as Private and verify that additional permissions have not inadvertently been added that would expose protected information.

### Sharing Folders

---

When adding folders and files to the Content Collection, keep in mind which users and user lists the content will be shared with. Try to create folders in which all items are to be shared with the same users. When items shared with the same users are spread out among different folders, it may become very difficult to manage. For example, if the user plans on creating documents that will be applicable to all users at the institution, they should create a folder that will be shared with All System Users, then add the specific items to this folder.

### Sharing files

---

Files are automatically available to the user that added the file but must be shared if other users are to view the item.

Files inherit permissions from the folder they reside in. This means that if a file is added to a folder that already has Read and Write permission for certain users or user lists, the those same users will also have Read and Write permission on the newly added file.

### Overwrite Option on Folders

---

When modifying or adding permissions to a parent folder, the user has the option to force all files and subfolders to inherit these permissions. For example, if the Read and Write permissions are added to the folder, and an item within the folder has Read, Write, and Remove permissions, Remove permissions would be removed from the file. All subfolders and files within the parent folder would be granted Read and Write permissions.

If this option is not selected, the files and subfolders are automatically granted any additional permission given to the parent folder, but existing permissions are not removed. For example, if Read, Write and Manage permissions are added to the folder, and an item within the folder has Read, Write, and Remove permissions, the permissions for the file would remain Read, Write and Remove, and Manage would be added.

After modifying permissions on a folder, the user may modify the permissions on an item, but these will be overwritten the next time permissions on the parent folder are modified. This is one reason storing items with the same purpose and audience in a single folder makes managing permissions much easier.

## TOOLS FOR SHARING AND FINDING CONTENT

### About Tools for sharing and finding content

---

A number of tools are available to facilitate sharing content and searching for content that has been shared. These options are dependent on the level of the folder shared, for example granting permission on a top-level folder versus a subfolder. Remember that when a folder is shared, permissions are granted to all content in the folder.

### Find Folder

---

The Find Folder option allows users to search for top-level folders they have permissions to, for example if another user has granted him or her Read permission on a username folder. When a user is granted permissions to a top-level folder, the Find Folder option allows the user to locate the folder and add it to his or her Content Collection Menu; making it easy to access the folder on a regular basis.

Users may decide to share a top-level folder with another user, and then adjust the permissions on the content within, limiting the content this user may access. For example, grant the user Read permission on the username folder. Then open the folder and remove Read permission for the content this user should not view. The user may still use the Find Folder option, but they will only view specific content in the folder.

### Search

---

Search allows users to locate all files and folders that have been shared with them. When a search is performed only those items to which a user has permissions will be returned. If permissions are granted on a nested folder (and not the top-level folder) the user may search for the folder and bookmark it; the Find Folder option may not be used on nested folders.

### Go To Location

---

Go to Location allows users to go directly to a specific folder that has been shared with them in the Content Collection. This time-saver allows users to enter the path to open a folder and Bookmark the location at the same time.

### Bookmarks

---

Bookmarks enable quick access to frequently used content without having to navigate through several folders. Bookmarks can be organized into folders and subfolders as needed by the user. This tool is helpful when permissions are granted on a nested folder, since the Find Folder tool may not be used.

### Workflow Activities

---

If a user is expected to take action or respond to an item, it is helpful to send a Workflow Activity with the item. When a Workflow Activity is created users are selected to share the item with and permissions are granted. An option may also be selected to send an email to these users stating that this item has been shared with them and that a Workflow Activity is attached to it.

## Passes

---

Passes may be used to share a file with a user for a specific amount of time. This is especially useful for sharing files with users who do not have system accounts. When a pass is created, the user decides whether to grant Read or Read and Write permission to the file with the pass. When the time allotted for the pass is over, the user will no longer be able to access the file.

## Portfolios

---

Portfolios allow users to collect and organize files into custom Web pages. These Portfolios can then be presented to individuals and groups of users. It is important that users consider the permissions granted to files that are linked to in a Portfolio. If another user has permissions (other than Read) to a file that is linked to a Portfolio, the file may be modified or removed, resulting in issues for the Portfolio users.

## RECYCLE BIN

### Overview

The Recycle Bin is a Content System folder that contains any items or folders that have been removed from the Content System. Any user can restore items from the Recycle Bin to the Content System.



- **Warning: If the Recycle Bin is disabled, any items or folder removed from the Content System are permanently deleted.**

### Find this page

The Recycle Bin is displayed under the Institution folder on the Institution Content directory tree. Click Recycle Bin to display its contents.



**NOTE:** The Recycle bin does not appear until the first item is deleted.

### Functions

The following functions are available on the Recycle Bin page.

FUNCTION	DESCRIPTION
<b>Action Bar</b>	
Empty Bin	Click to delete all the contents of the Recycle Bin. Click <b>Yes</b> on the warning message to complete the deletion.
Add Link	Click to add an External Link to the Recycle Bin.
Copy	Copy items from the Recycle Bin. Select items and click Copy to display the Copy Item or Copy Folder page.
Move	Move items from the Recycle Bin to another directory. Select items and click Move to display the Move Item or Move folder page.
Restore	Restore items from the Recycle Bin to their previous locations in the Content System.

FUNCTION	DESCRIPTION
Remove	Select items or folders and click Remove to permanently delete them from the Content System.
Download Items	Select items or folders and click Download Items to save them in a compressed ZIP file.
<b>Item and Folder Information</b>	
Path	The item and its original path are displayed.
Modified	The date and time that the item or folder was last modified.
Size	The size of the item or folder in KB.
Permissions	The permissions for that item or folder are displayed.
Versions	The version status of the item or folder is displayed.
Comments	The comments for the item or folder are displayed.
Modify	Click Modify to make changes to the appropriate item or folder.
Refresh	Click to display any items or folders added to the Recycle Bin since the last browser session.
Selection Drop-Down List	Use this drop-down list to select all items and folders, unselect all items or invert the current selections. Make a selection and click <b>Go</b> .
Items per page	Use this drop-down list to control how many items are displayed on the Recycle Bin page. Make a selection and click <b>Go</b> .

## UNIQUE ID TOOL

### Overview

---

In previous versions of the Content System, links to the Content System files and folders (when viewed from Course Documents, for example) were stored as absolute paths in the database. The problem was that every time a Content System file or folder was moved, the link would break. These links are the links that can be viewed elsewhere in the Learning System.

The Unique ID Tool solves this problem by reconciling the paths to files and folders (as seen in the Learning System) with the unique IDs for those Content System items. This unique ID never changes, even if the item is moved within the Content System.



**NOTE:** If you are installing the Content System for the first time with Release 7, Application Pack 3, this tool is unnecessary.

### Find the tool

---

The tool can be found in the following directory: **blackboard-installation-dir\apps\bbcms\bin**.

### Execute the tool

---

Follow these steps to run this tool from the command line:

1. Open the command line interface.
2. Navigate to this folder: **blackboard-installation-dir\apps\bbcms\bin**.
3. Type **updatecspathtoxythosid** and press **Enter**.



**NOTE:** This tool can be run more than once in case problems occur.

### Execute the tool with a log file

---

A log file can be generated with this tool that shows broken links that could not be reconciled with a Content System item.

Execute the following command to run the tool and generate the log file:

- Type **updatecspathtoxythosid > path/filename.txt** and press **Enter**. Where **path** is the folder where the log file is placed and **filename.txt** is the name of the log file.

## ORGANIZE THE USER FOLDER

### About the user folder

---

A user folder is created the first time a user enters the Content Collection. The name of this folder is the same as the username. This area may be organized according to the individual's needs.



**NOTE:** The Administrator determines whether username folders are granted for all users or only users with certain roles.

### Storing content

---

Users should organize their user folder so that personal files and shared files are easy to access and manage. The user folder is a good area to for storing documents that are in development and private files. This area may also be used as a working space for group collaboration. The following are some examples of folders which may be helpful to create:

- **Private Folder** – a working area where projects that are in progress are stored. This folder is not shared with any users.
- **Group folders** - group collaboration folders, shared with other group members, where projects may be worked on together.
- **Private course material folders** – if the user is an Instructor, a folder in this area may be used to store private course information, such as student grades.

### Granting Permissions

---

Users should only grant Read permission on the top-level username folder. Granting additional permissions to this folder makes it very difficult to manage and organize the contents. If other users are granted Read permission to the top-level folder, don't forget to remove permissions for any subfolders or items that should remain private.

## CHAPTER 2—VIEW CONTENT

### Overview

---

This chapter reviews how to find files within the Content Collection.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Access the Content Collection</a>	Describes how to log in and open the Content Collection.
<a href="#">Personal Settings</a>	Describes how to set a new entry point through the Personal Settings page.
<a href="#">Content Areas</a>	Reviews the different sections of content storage found in the left pane.
<a href="#">e-Reserves</a>	Introduces e-Reserves and explains how they are managed by librarians.
<a href="#">Folders and Items</a>	Introduces the basic components of the Content Collection, folders and items.
<a href="#">Navigation</a>	Details the different objects used to move through the Content Collection.
<a href="#">Go to Location</a>	Details the Go to Location function that allows users to go directly to a specific folder in the Content Collection
<a href="#">Bookmarks</a>	Describes how users can save and organize Bookmarks.
<a href="#">Add Bookmarks</a>	Provides instructions on how to set up a Bookmark to quickly access a file without navigating through folders to find the file.
<a href="#">Web Folders</a>	Explains Web Folders, and provides instructions for setting them up.

## ACCESS THE CONTENT COLLECTION

### Overview

---

The Content Collection is fully integrated with the *Blackboard Learning System*. If you can log in to the *Blackboard Learning System* you can access the Content Collection.

### Login to the *Blackboard Learning System*

---

Follow these steps to login to the *Blackboard Learning System*:

1. Enter the URL for the *Blackboard Learning System* in a Web browser.
2. Click **Login**.
3. Enter the Username and Password for an active account.

For more information on logging into the *Blackboard Learning System* please see the *Blackboard Learning System Student Manual*.

### Find the Content Collection

---

The Content Collection is a seamless part of the *Blackboard Learning System*. After logging into the Learning System, select the **Content Collection** tab to access the Content Collection.

Keep in mind that the System Administrator may restrict access to the Content Collection. The System Administrator may also rename the **Content Collection** tab. If you have difficulty finding the Content Collection after logging into the *Blackboard Learning System*, please contact the System Administrator at your institution for assistance.

## PERSONAL SETTINGS

### Overview

---

The Personal Settings page allows users to select an entry point into the Content Collection that best meets their needs. If a user accesses the same course in the Content Collection every time they open the tab, simply set the Home Page to point to that course folder in the Content Collection for quick access.

### Home Page Settings

---

Follow these steps to set a custom home page. This is the first page seen when accessing the Content Collection.

1. Open the Content Collection tab.
2. Click **Personal Settings**.
3. Select **Custom Location**.
4. Enter the location that should appear when accessing the Content Collection tab. Use the **Browse** function to search for and insert a location.

## CONTENT AREAS

### Overview

---

The Content Collection organizes files and folders into separate areas for users, courses, and the institution itself. Each area is accessed through the Content Collection menu. Selecting an area displays the hierarchy of folders and files available to the user in that area.

Areas act as the main file directories beneath the top-level folder. For example, the location bar for the Course Content area is /courses. The folder for a course within that area would read /courses/course\_name. For more information on folders and items, please see the next topic, [Folders and Items](#).

### My Content

---

The My Content area is used to store folders and files (referred to as items) for each user. Opening the My Content area will allow access to personal files the user has added to the Content Collection.



**NOTE:** Users must use the Search feature to find and view content items or folders that have been shared with them. The user may add Bookmarks to these locations so they are easily found in the future.

### Course Content

---

The Courses area is used to store folders and files for each course. Opening the Course Content area will show a folder for each course that allows the user to see content. Instructors will see folders for the courses they are teaching when they access the Content Collection. Instructors must grant permissions to Students before course folders will be available to them.

### Institution Content

---

The Institution area is used to store folders and files for educational and administrative services not directly related to a course. The Institution Content area view in the Content Collection menu also includes a separate area dedicated to the Library. The school library may use this area to post e-Reserves, electronic manuscripts, and other resources. With the ability to share folders and files across the Content Collection and seamless integration with the *Blackboard Learning System*, this is a powerful and intuitive way to share and distribute library materials.

## E-RESERVES

### Overview

---

e-Reserves allow librarians to make content available to users throughout the system. Content is made available in the Library Content folder, or placed into a course folder within e-Reserves. All users who have at least Read permission to a course folder (granted automatically by course enrollment), except Guests and Observers, may view the content in e-Reserves folders, but only the librarian may add or modify e-Reserve content. Courses must be available for the content in e-Reserves to appear. Instructors may add content from e-Reserves to their courses.

### Librarians

---

The System Administrator must give a user the appropriate permission to become an e-Reserve librarian. Librarians have access to all of the content in e-Reserves; they also have permissions to read, write, remove and manage this content. Course Instructors may read e-Reserve content, but they cannot modify it in any way or remove it.

### Creating e-Reserve Course Folders

---

e-Reserves contain specific folders for courses in the system. The System Administrator may automatically generate the e-Reserves directory, which will include folders for each course. If the Administrator does not generate this directory, course folders within e-Reserves are automatically generated when the Instructor, Teaching Assistant or Course Builder selects the e-Reserves folder in the file system. For example, if the Instructor for a history class would like to create an e-Reserve folder, he or she would click the e-Reserve folder. A folder with the Course ID of the history class will automatically appear in the e-Reserves area.

### Accessing e-Reserve folders

---

The Find Folder option makes it very simple for e-Reserve librarians to access e-Reserve course folders. Using this tool, the librarian may select the e-Reserve course folders to which they have permission and display them in the Content Collection menu.



**NOTE:** Course folders automatically appear in the librarian's e-Reserve area if the librarian is enrolled in the course.

## FOLDERS AND ITEMS

### Overview

---

The Content Collection stores content files as items. Items are organized into a tree structure of nested folders and items up to, and including, the content area level. This means that each folder can contain other folders and items.



**NOTE:** Users cannot create items and folders with the same names in a single area of the Content Collection, for example, within My Content.

### Folders

---

A folder stores both items and other folders. Folders must be made available to a user before that user can view the contents of the folder. Folders are made available to users when a person with ownership of the folder adds that user to the folder. For example, the Instructor of a course can make the folder for that course available to students in the course. The Content Collection allows adding users to folders in pre-defined groups such as course users or users with a specific institution role.

It is important to remember that all folders are contained within other folders up to the top-level (/) folder. Even the content areas are simply folders stored under the top-level folder. Note that top-level folder access is generally reserved for the Administrator.

Users added to a folder are assigned permissions to control their actions within the folder. Permissions include: Read, Write, Remove, and Manage. Privileges are an easy way to show content while protecting it from unauthorized changes.

The size of each folder can be restricted to prevent unmanaged growth. Size quotas are definite for each folder, but flexible within the folder to allow some subfolders to grow larger than others.

Metadata and comments can be added to a folder to make it easy to find when searching and to make it easy to identify the content in the folder by adding a description.

### Items

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An item is a file stored in the Content Collection. Items are automatically available to the user that added the file but must be shared if other users are to view the item. The permissions, comments, and metadata functions work the same for items as for folders. Items include several other management features that are not used with folders.

Passes may be created for an item to allow anyone, even those without a user account, controlled access to the item. When viewing content through a pass, the viewer cannot access other areas of the Content Collection. Passes can assign Read permission only or Read/Write permission to allow collaboration. Passes are a great way to share a file with someone who is not a Content Collection user because a pass allows direct access to the file through a URL without logging in to the system.

Items use versions to allow collaborative work without overwriting earlier drafts. Each draft is stored as a separate version that can be checked out and checked in to manage changes. Only the user that has a version checked out can make changes to the file.

Use of the item can be viewed through the tracking feature. Tracking displays every instance that the file was changed or read and shows the user that took the action. Tracking is useful for managing changes or for Instructors to verify that students have read an item.

## NAVIGATION

### Overview

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The Content Collection uses an interface similar to the *Blackboard Learning System*. Users who are comfortable navigating the *Blackboard Learning System* will learn how to move around the Content Collection quickly.

### Content Collection menu

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The Content Collection menu includes two navigation views: folder view and shortcut view. Users can choose which view they prefer. The system will save this preference and return the user to this view each time they enter the Content Collection (unless they change their preference by switching views). Users may drag the right-side of the frame to adjust the size of Content Collection menu.



**NOTE:** The System Administrator may override the user's ability to switch navigation views.

The shortcut view includes buttons to open each content area as well as Portfolios and tools. It does not include direct access from the Content Collection menu to other tools or to folders nested within each area.

The folder view shows much more detail including the folders within each content area and provides the option to expand or close each folder to view the subfolders. In addition to the content areas, the folder view also shows tools in a tree structure. Tools include workflows, Bookmarks, search, and the online help system.

### Content Frame

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The Content Frame occupies most of the screen to display the current view. Users interact with content from this view. The Content Frame also includes several navigation features. The size of the Content Frame can be increased or decreased with respect to the Content Collection menu by clicking and dragging the border that separates the two panels.

### Action Bar

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The Action Bar appears at the top of the Content Frame. It includes buttons to perform actions specific to that page.

### Location bar

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The Location Bar shows the current folder that is open in the Content Frame. The location bar appears beneath the Action Bar and includes links for all the folders in the path to the current folder up to the top-level (/) folder.

## Content List

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The Content List displays the folders and items contained in the current folder. It can also display pages that control the item and folder management functions. When displaying the contents of the folder, users can sort the folders and items by clicking the carats above each column. The names in the list are sorted by files and folders, with folders appearing first. The sort is also case sensitive, so all names beginning with A-Z appear before those beginning with a-z. The disk space quota for the current folder also appears right-justified just above the list of contents.

## GO TO LOCATION

### Overview

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The Go to Location page allows users to go directly to a specific folder in the Content Collection. This time-saver allows users to enter the path to open a folder and Bookmark the location at the same time.

### Find this page

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Select **Go to Location** under Tools on the Content Collection menu.

### Fields

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The Go to Location page includes the following fields.

FIELD	DESCRIPTION
<b>Enter Location</b>	
<b>Location</b>	Enter the full path to the folder. Remember to begin with the top-level (/) folder. For example, /courses/history/documents. This field is case sensitive.  Instead of typing the full path, it is sometimes easier to click Browse and use the browse interface to find and select the folder. This is also helpful if you are unsure of the full path!
<b>Options</b>	
<b>Bookmark this Location</b>	Select <b>Yes</b> to create a Bookmark for this folder. Select <b>No</b> , and a Bookmark is not created.
<b>Bookmark Name</b>	Enter a name for this Bookmark.

## BOOKMARKS

### Overview

The Bookmark page displays all of the current user's Bookmarks. Selecting a Bookmark immediately opens a folder without having to take the steps to navigate to the exact path. Bookmarks enable quick access to frequently used content without having to navigate through several folders. From this page users can add and remove Bookmarks or simply click on a Bookmark to go to the marked folder. Users may use Bookmarks to quickly find items and areas in the Content Collection that have been shared with them by other users.

Bookmarks can be organized into folders and even folders within folders. The Content Collection offers the flexibility to create sophisticated and deep Bookmark storage. Keep in mind that the purpose of Bookmarks is to provide quick access to content, and the organization of Bookmarks should not be more complicated than the organization of the content.



**NOTE:** If a file that has a Bookmark is overwritten, the file must be refreshed before the new file appears when the Bookmark is selected.

### Find this page

Select **Bookmarks** under Tools on the Content Collection menu.

### Functions

The Bookmarks page includes the following functions.

To . . .	CLICK . . .
<b>add a Bookmark</b>	<b>Add Bookmark</b> in the Action Bar. The Add Bookmark page appears.
<b>delete a Bookmark</b>	<b>Remove</b> after selecting the check boxes for the Bookmarks to be removed. If a Bookmark is mistakenly removed, it must be recreated from the Add Bookmark page.
<b>follow a Bookmark</b>	the Bookmark title. The folder the Bookmark is linked to opens.
<b>add a folder</b>	<b>Add Bookmark Folder.</b> The Add Bookmark Folder page appears. From this page, enter a name for the folder and click <b>Submit</b> .
<b>change a Bookmark</b>	<b>Properties.</b> The Modify Bookmark page appears. The user may change the link or name of the Bookmark from this page.

To . . .	CLICK . . .
<b>modify the item the Bookmark is pointing to</b>	<b>Modify.</b> The Modify item page appears. The user may change the properties, metadata, permissions and other aspects of the item. This link only appears if the user has Write or Manage permissions to the item.

### Invalid Bookmarks

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When an item that has been added as a Bookmark is removed from the Content Collection, the Bookmark becomes invalid. Invalid Bookmarks are identified on the Bookmarks page and grayed out, so they cannot be selected. The Remove option may be used to delete invalid Bookmarks from the Bookmarks page.

## ADD BOOKMARKS

### Overview

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A Bookmark is a link to an item or folder in the Content Collection. Bookmarks are convenient for opening folders that are accessed frequently or for remembering the location of an important, but seldom used or hard-to-find folder.

Bookmarks are added from the Create Bookmark page. After a Bookmark is added, it appears under the Bookmarks node of the Tools tree.

### Find this page

---

Follow these steps to open the Create Bookmark page.

1. Select **Bookmarks** under Tools on the Content Collection menu.
2. Click **Add Bookmark** from the Action Bar.

### Fields

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The Create Bookmark page includes the following fields.

FIELD	DESCRIPTION
<b>Bookmark Information</b>	
<b>Bookmark Name</b> [r]	Enter a name for the Bookmark.
<b>Bookmark Location</b> [r]	Enter the full path to the folder. Remember to begin with the top-level (/) folder. For example, /courses/history/documents. Instead of typing the full path, it is sometimes quicker or easier to click <b>Browse</b> and use the browse interface to find and select the folder. This is also helpful if you are unsure of the full path!

## WEB FOLDERS

### Overview

---

WebDAV is an Internet standard used for sharing files via the Internet regardless of platform (Windows, Macintosh, Linux, Sun Solaris, and so forth). When put into use with the Content Collection, WebDAV (called Web Folders) is a means for each user to access content from the Content Collection as if it were it any other network drive or folder.

Setting up Web folders to work with the Content Collection is not difficult because most operating systems are now WebDAV compatible. All you need to connect is the Web address of the folder and a valid Username or password.

### Find the Web address of a folder

---

The URL for a folder in the Content Collection is needed to replicate the folder in the operating system. Follow these steps to find the URL for a folder in the Content Collection:

1. Navigate to the folder in the Content Collection.
2. Click **Web Folder** in the Action Bar.
3. A new window appears with an index of the folder contents. This page does not contain any of the recognizable navigation elements, such as the shortcut view or the folder view, of the Content Collection.
4. Copy the URL that appears in the address field of the Web browser. This is the URL needed to map to the folder.



**NOTE:** The Web Folder button will automatically open the mapped folder from the operating system if it has already been mapped. This is a quick way to access content for editing after locating it in the Content Collection.

Another way to find the URL of a folder in the Content Collection is simply to navigate to the Edit Folder Properties page. The **Address** field on this page (Not the address displayed by the Web browser!) contains the URL needed to map to the folder.

### Setup a Web folder in Windows

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#### Users with a Netscape browser

After finding the URL for a folder, follow these steps to mount the folder in Windows:

1. Open Internet Explorer. Do not select **Folder** in the Action Bar.
2. Open **My Network Places** in the left frame.
3. Double-click Add Network Place.
4. Enter the URL into the text field or copy and paste it.
5. Click **Next**. You are prompted to enter a name for the Network Place.
6. Enter a name for the Network Place and select **Finish**. The Web folder opens. It is now listed in **My Network Places**.



**NOTE:** After opening **My Network Places**, uncheck the **Folders** button in the Action Bar. The **Add Network Place** option appears in the left side frame.

### Users with an Internet Explorer browser

Internet Explorer users can create a Web folder by simply selecting **Web Folder** on the Action Bar inside the Content Collection. Please be aware that some versions of Internet Explorer do not allow Web folders with a path longer than 100 characters.

### Setup a Web folder in Mac OS X

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After finding the URL for a folder, follow these steps to mount the folder in Mac OS X:

1. From Finder select the **Go** menu and then **Connect to Server**.
2. Enter the URL in the Address field. If you plan on mounting this folder often, click **Add to Favorites** so you can mount it again quickly.
3. Click **OK**. You are prompted for your Username and Password. Enter your *Blackboard Learning System* Username and Password.
4. The folder is mounted and appears on your desktop and in Finder under Network.



**NOTE:** SSL WebDAV is not supported in Macintosh OS X version 10.3.1 and earlier. Users can use Goliath for Macintosh to support SSL with WebDAV.

### Using Web Folders with the Content Collection

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Web Folders mount a folder and all its subfolders and files to the operating system. Files may then be opened and accessed with any appropriate application for viewing and editing.

For example, add a Microsoft Word file to the Content Collection in your user folder. Click on the file from within the Content Collection. The file opens in the Web browser, it can be read and written, but it cannot be saved back to the Content Collection. Now mount your user folder using the instructions above. When you open the folder through your operating system you will see the same file. When you open the file, the file opens in Microsoft Word. You can use all of Word's features to edit the file and you can save it back to the mounted folder. When you view the content again through the Content Collection, your changes have been made. You may also drag folders from the local system (for example, the Desktop) and place them in a Web Folder.

Users may add items from the Web Folder to areas in the Content Collection using the Web Folder feature. When the Web Folder is opened, users should not attempt to navigate to other areas in the directory using the **Up** button in the Web folder window.

Because the Content Collection is designed to be used by the entire community at a school or other institution, there are tools for not only displaying content to other users, but tools for collaborating with other users on projects. The Versioning feature allows users working with the same file to lock the file while making changes to prevent another user from writing over their changes. At the same time, versioning keeps track of every saved instance of the file to make it easy to revert to a previous draft. For more information please see the topic Versions and Manage Versions.

## File Names

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The characters a-z, 0-9, period '.' and underscore '\_' are acceptable in file names. All standard ISO 8859 characters (not foreign characters or symbols) are also supported. All spaces will be converted to underscores '\_' in the name of the uploaded file. Special characters are not supported in file names. There is a 255 character limit for all file and folder names. The total path to a file or folder must not exceed 400 characters.

## CHAPTER 3—SEARCH CONTENT

### Overview

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This chapter reviews how to find files within the Content Collection.

### Contents

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Search Overview</a>	An overview of the Search feature.
<a href="#">Perform a Basic Search</a>	Explains how to perform a Basic Search.
<a href="#">Perform an Advanced Search</a>	Explains how to perform an Advanced Search.
<a href="#">Search Portfolios</a>	Explains how to search Portfolios.
<a href="#">Using Search Results</a>	Describes how to use the results of a search.
<a href="#">Save Searches</a>	Describes how to save searches and manage them.
<a href="#">Quick Search from the Tools Menu</a>	Explains the Quick Search tool.

## SEARCH OVERVIEW

### About Search

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The Search Content tool provides users with ways to access, group, and save the vast amount of content available to them in the Content Collection. It provides an alternative way to access information that is presented in the user's folder tree or shortcut view, as well as information that is shared to a user but not accessible from the Content Collection menu.

Search is a powerful tool to use in two circumstances:

- **Accessing files or folders not displayed in the folder tree.** If Read permission has been granted to a user on a file or folder that is not displayed in a user's folder tree or shortcut view, search criteria, such as the name of the file or folder or the username of a person who created the file, may be used to find the item.
- **Discovery of information.** Use search to find information stored in the Content Collection related to a particular topic, written by a specific user, or including particular metadata.

The Search page is quickly accessible from the Tools panel on the Content Collection menu. It is most useful when at least part of the item name is known. Users also have the option of conducting either a Basic Search or an Advanced Search. Searches can be saved and used over and over again from the Saved Searches page. Users may also search Portfolios and Portfolio items



**NOTE:** Content Collection items attached to Portfolios are searched during a Basic or Advanced Search. Whole Portfolios and Portfolio items (such as Welcome pages, Item pages, and Template pages) cannot be located using Basic and Advanced Search. Use the Portfolio Search to locate these items.

### 'Smart' Searches

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All searches are based on the permission a user has on a file or folder. If Read permission does not exist on an item, it will not be displayed in the Search results, even if it matches the search criteria. If additional permission exists on a file or folder, the permission will apply to that file or folder if it is opened from the search results.

### 'And' Searches

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Entering criteria in multiple search fields on the Search page creates what is known as an 'AND' search. An item must meet all the criteria entered on the page to be returned in the search results. Each criteria entered narrows the search.

Only one field on the page must have criteria entered in it to execute a search. It is not possible to return all files and folders by entering no criteria.

### Case Insensitivity

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All searches are case-insensitive. Regardless of whether lower-case or capital letters are typed, the search will ignore this and return the same results.

## Search criteria

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The following information is helpful when conducting searches in the Content Collection:

- Users must enter at least one term on a Search page; they cannot return all files on the system by entering nothing.
- If multiple words are entered in a search, the query will return only those files that include all of the specified words.
- Wildcard searches may be used when searching file contents. For example, if "search\*" is entered, items with "search" and "searches" in the content will be returned. Partial word searches may not be used in this instance.
- Partial word searches may be used when searching file names. For example, if "searches" is entered, items with "search" in the file name will be returned. Wildcard searches may not be used in this instance.
- Users may enter a file extension in the **File or Folder Name** field to return all files for one type of extension. For example, ".xls" may be entered to return all Excel files.
- Use the buttons on the Search page and Search Results page, such as **Submit** and **Back**, rather than using the options in the Browser Action Bar or ENTER on the keyboard. Using options other than those provided on the pages of the Content Collection may result in error messages.

## Wildcard, Proximity and Fuzzy searches

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The following information is helpful when conducting wildcard, proximity and fuzzy searches in the Content Collection. These types of searches may only be used when searching file contents, not file names.

- A single character wild card search may be performed by using the "\*" symbol in the middle or at the end of the search terms. This is used to find a term where one character is debatable, for example, "te\*t".
- A multiple character wild card search may be performed by using the "\*" symbol in the middle or at the end of the search terms. This is used to find a term where multiple characters are debatable, for example, "test\*".
- A "\*" symbol cannot be used as the first character in a search; this will return all items in the Content Collection.
- Fuzzy searches may be done using the tilde, "~", symbol. For example, to search for a term similar in spelling to "roam", enter "roam~" in the search field.
- Users may search for words within a certain proximity to one another using the tilde, "~", symbol. For example to search for "test" and "history" within 10 words of each other in a document use the search: "test history"~10

## Boolean searches

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The following Boolean operators may be used to search in the Content Collection: AND, OR, NOT, "-", "+". Boolean operators must be entered in ALL CAPS. Parentheses may be used to group clauses and form sub queries in searches.

**OR operator** - This operator links two terms and finds a matching document if either of the terms exists in the document. The symbol "||" may be used in place of the word OR. For example, to search for documents that contain either "test history" or just "test" use one of the following queries: "test history" test , "test history" OR test

**AND operator** – The AND operator matches documents where both terms exist anywhere in the text of a single document. The symbol "&&" can be used in place of the word AND. For example, to

search for documents that contain "test history" and "history test" use the query: "test history" AND "history test"

**NOT operator** – The NOT operator excludes documents that contain a specific term. The symbol "!" can be used in place of the word NOT. For example to search for documents that contain "history test" but not "calculus test" use the following query: "history test" NOT "calculus test"

**+ operator** – This operator requires that the term after the "+" symbol exist somewhere in the text of a single document. For example, to search for a document that contains "test" and may contain "history" use the following query: +test history

**- operator** – This operator will exclude documents that contain a specific term. For example, to search for documents that contain "history test" but not "history assignment" use the following query: history test – assignment

**Grouping** – Parentheses may be used to group clauses to form subqueries within a Search. For example, to search for either "history" or "revolution" and "test" use the following query: (history or revolution) AND test

## PERFORM A BASIC SEARCH

### About Basic Search

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Basic Search allows users to quickly search for Content Collection items using a limited number of search criteria. The filename and all metadata associated with the file are automatically included in the search.

### Basic Search fields

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Basic Search includes two search fields:

FIELD	DESCRIPTION
<b>Search Criteria</b>	
Metadata, File Name, or Folder Name	<ul style="list-style-type: none"> <li>• Select Contains to search for all items that contain the criteria entered. Select Equals to search for all items that exactly match what you have entered.</li> <li>• Enter text to search for in the Content Collection. This field searches the names of metadata, files, and folders loaded in the Content Collection.</li> <li>• The file types searched are: .doc, .xls, .ppt, .pdf (excluding encrypted pdf files), .html, .htm, .rtf, .txt.</li> <li>• The asterisk (*) symbol may be used to return all files and folders that a user has permission to Read (up to a number set by the System Administrator); this is known as a wildcard search.</li> <li>• Partial word searches are allowed (typing part of a word as opposed to the whole word, for example, 'enviro' instead of 'environment').</li> </ul>

FIELD	DESCRIPTION
Metadata, File Name, or Folder Name (continued)	<ul style="list-style-type: none"> <li>• A single character wild card search may be performed by using the "*" symbol in the middle or at the end of the search terms. This is used to find a term where one character is debatable, for example, "te*t".</li> <li>• A multiple character wild card search may be performed by using the "*" symbol in the middle or at the end of the search terms. This is used to find a term where multiple characters are debatable, for example, "test*".</li> <li>• Fuzzy searches may be done using the tilde, "~", symbol. For example, to search for a term similar in spelling to "roam", enter "roam~" in the search field.</li> <li>• Users may search for words within a certain proximity to one another using the tilde, "~", symbol. For example to search for "test" and "history" within 10 words of each other in a document use the search: "test history"~10</li> </ul>
Search File Contents	Click this checkbox to search through the contents of the files themselves.
Search Recycle Bins	<p>Choose whether or not to search the Recycle Bins by using the <b>Yes</b> or <b>No</b> radio buttons.</p> <p>This option only appears if the Recycle Bin is enabled.</p>

## PERFORM AN ADVANCED SEARCH

### About Advanced Search

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Advanced Search contains the same two fields as a Basic Search, plus:

- Comment Search
- Additional Search Options and Metadata searches for more granular results
- A Save this Search function that allows a user to save search criteria and re-run the search with one click (from the Saved Searches page)

### Comment Search

---

Underneath the Search File Contents field, a checkbox appears for Search File Comments. If a file has comments on it that meet the search criteria entered in the **Search File Content** field, the file will return in the results. To see comments on a file, comments must be Shared (not Private), or Manage permission must exist for the user on the file.

### Additional Search Options

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Additional search options allow for narrowing search results to more specific criteria. Like all other searches, each field criteria entered narrows the search.

FIELD	DESCRIPTION
<b>Search From</b>	<p>Enter the path to the folder or click <b>Browse</b> to select the folder that should be searched.</p> <p>The search includes any subfolders, so if no folders in the path are known, searching by the top-level (/) folder still returns the item, although the search takes much longer.</p> <p>All the files and folders in that location (to which the user has at least Read permission to) display</p> <p>The path is case-sensitive, meaning that the file or folder names must look exactly as they do in the Content Collection.</p>
<b>Size</b>	<p>Enter a document size and choose <b>Less Than</b> or <b>More Than</b></p> <p>All the files and folders that meet the size criteria (to which user has at least Read permission to) display</p> <p>Keep in mind that there are approximately 1,000 bytes in a Kilobyte and approximately 1,000 kilobytes in a Megabyte</p>
<b>Username</b>	<p>Select either <b>Created By</b> or <b>Last Modified By</b> and enter a username or click <b>Browse</b> to open the User Search and select users</p> <p>All the files and folders that meet the username criteria (to which the user has at least Read permission to) display</p>

FIELD	DESCRIPTION
<b>Dates</b>	Select either <b>Created</b> or <b>Last Modified</b> , <b>On, Before, or After</b> and a date  All the files and folders that meet the date criteria (to which the user has at least Read permission to) display

## Metadata

Metadata search fields allow a user to search for Metadata that has been previously entered on a file. There are four categories of Metadata that a System Administrator can make available: General Metadata, IMS Metadata, Dublin Core Metadata and Full IMS Metadata. Only those templates that have been made available are displayed. Metadata may be added to a file when it is created or modified.

Each metadata template that is displayed can be revealed by clicking the associated plus icon. Refer to the following topics for a complete list of metadata fields:

- Dublin Core Metadata,
- Full IMS Metadata,
- General Metadata, and
- IMS Metadata.

Like all other searches, each Metadata field criteria that is entered narrows the search. Only files that contain all the search criteria entered will be returned.



**TIP:** Institutions can use metadata in a coordinated way to make finding content easier. For example, if librarians consistently use metadata to enter subject or username information, then Students can use the Search tool to find topical information, all documents by a certain author, or any other criteria that is entered.

## Save this Search

Save search criteria by entering a Search Name in the **Save Search as** field, then click **Submit**. The search is automatically saved and accessible from the Saved Searches page.

## SEARCH PORTFOLIOS

### About Portfolio Search

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The Portfolio Search page is accessible from the Basic Search page. If a Portfolio has been shared to a user or user group, Portfolio Search can be used to find it.

It may be used to search for entire Portfolios or for non-Content Collection items included in Portfolios, such as Welcome pages and Item pages. Template Item pages in a Portfolio are not searched.

The Portfolio Search is not used to search for Content Collection items that are linked to in a Portfolio; use either the [Basic Search](#) or the [Advanced Search](#) for this purpose.

Portfolio Search appears to all users if Portfolio functionality is available to any users on the Content Collection, otherwise it is hidden.



**NOTE:** This feature is only available if the System Administrator enables Portfolios.

### Portfolio Search Fields

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Like all other searches, each Portfolio search field further narrows the search. Only files that contain all the search criteria entered will be returned.

FIELD	DESCRIPTION
<b>Search Criteria</b>	
<b>Portfolio Usernames</b>	<ul style="list-style-type: none"> <li>Enter one or more usernames, or use <b>Browse</b> to search for users</li> <li>Portfolios created by that user(s) that have been shared to you are displayed</li> </ul>
<b>Name/ Description</b>	<ul style="list-style-type: none"> <li>Enter Portfolio Names or Descriptions</li> <li>Partial names and descriptions are allowed</li> <li>If more than one word is entered, all words must appear in the Portfolio Name or Description (does not have to appear in both) in that particular order.</li> <li>Portfolios matching the search criteria that have been shared to you are displayed</li> </ul>
<b>Learning Objectives</b>	<ul style="list-style-type: none"> <li>Enter Learning Objectives</li> <li>Partial names and descriptions are allowed</li> <li>If more than one word is entered, all words must appear in the Learning Objectives in that particular order</li> <li>Portfolios matching the search criteria that have been shared to you are displayed</li> </ul>

FIELD	DESCRIPTION
<b>Save this Search as</b>	<ul style="list-style-type: none"><li>• Enter one or more usernames, or use <b>Browse</b> to search for users</li><li>• Portfolios created by that user(s) that have been shared to you are displayed</li></ul>

### Save this Search

---

Save Portfolio search criteria by entering a search name in the **Save this Search as** field, then click **Submit**. The search is automatically saved and is accessible from the Saved Searches page.

### Portfolio Search Results

---

The results of the Portfolio Search appear on the Search Results page. Only Portfolios to which the user has permissions appears. Click the title of the Portfolio to open the Portfolio.

## USING SEARCH RESULTS

### About Search Results

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Users may work with items from the Search Results page in the same manner as if they were accessed from the folder tree or shortcut view. Users can manage the search results, email items to other users, and Bookmark items for later use.

### Permission necessary to work with items

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Actions that may be performed on items that appear in Search Results depend on the permission the user has for the item.

When search results are returned, any permission granted to a file or folder still applies.

- If a user has Read permission on the item, it can be opened, downloaded or emailed.
- If a user has Write permission on an item, it can be modified (edited). Write permission on a folder allows the user to add files or folders.
- If a user has Remove permission, it can be deleted.
- If a user has Manage permission, item properties such as metadata and comments may be modified and permission granted.

### Metadata on Search Results

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If a General Metadata Name and Description have been added to a file, this Metadata will display in the search results under the file name.

### Sorting Search Results

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If there is a downward pointing triangle at the top of a column in search results (such as over the file name), clicking the arrow will sort the results. Clicking the arrow again will reverse the sort.

### Viewing Portfolios from Search Results

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From Portfolio Search results, click on the name of the Portfolio to open it.

### Search Results Functions

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The following functions are available from the Search Results page.

To . . .	CLICK . . .
copy an item	the checkbox next to the item to copy and select <b>Copy</b> . The Copy an Item page appears.
move an item	the checkbox next to the item to move and select <b>Move</b> . The Move an Item page appears.

To . . .	CLICK . . .
remove an item from the search results	the checkbox next to the items to delete and select <b>Remove</b> .
save the search	<b>Save Search</b> . The Save Search page appears; enter a name for the search on this page.
add a Workflow to an item.	the box next to the item and select a Workflow from the drop-down list. Select <b>Go</b> . The Workflow page appears.
email an item	the box next to the item and select <b>Email Items</b> from the drop-down list. Select <b>Go</b> . The Email an Item page appears.
download and item	the box next to the item and select <b>Download Items</b> from the drop-down list. Select <b>Go</b> .
Bookmark an item	the box next to the item and select <b>Bookmark Items</b> from the drop-down list. Select <b>Go</b> . The Create Bookmark page appears.

## SAVE SEARCHES

### About Saved Searches

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The Saved Searches page stores searches so they can be used again. Searches may be saved when creating the search on the Advanced Search page or the Portfolio Search page, or they may be saved from the Search Results page.

Saved Searches can be shared with other Content System users. The Saved Search page lists all searches initiated on any search page for which a search name was entered in the Save this Search as field and the search was submitted. The filename and all metadata associated with the file are automatically included in the search.



**TIP:** It is beneficial to save a search that will be run regularly.

### Re-run Search

---

Click the name of a saved search to see the search results. This search runs anew every time the name is selected. The search results will change if a new file or folder has been added that meets the criteria, if a file or folder has been removed, or if permission to the file has been changed.



**TIP:** If it is important to have continued access to a particular file or folder that appears in the search results, then Bookmark the file or folder directly from the Search Results page. It can then be accessed from Bookmarks.

### Modify the Search

---

Click **Modify** next to a search to change the criteria for the search. The Search page where the search was initiated will open populated with the existing search criteria. If the saved search was a Basic Search, the criteria will display on the Advanced Search page and can be modified from there. Modify any criteria and click **Submit**.

### Sharing Saved Searches

---

Searches that have been saved can be shared with other Content System users. Follow these steps to share saved searches:

1. Click the **Saved Searches** link. The Saved Searches page appears.
2. Click the entry in the Direct Link column of the appropriate search.
3. Copy that entry.
4. Open a new browser window.
5. Paste the copied entry into the address field and press Enter. The Search Content page appears.

## Delete the Search

---

Click **Remove** next to a search to delete a saved search.

## QUICK SEARCH FROM TOOLS MENU

### About Quick Search

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The Quick Search field is located in the Tools area of the Content Collection Menu. Quick Search searches file and folder names for the word, words or partial words entered. This field can be used in the same way as the **Search File or Folder Names** field on the Basic or Advanced Search pages.

## CHAPTER 4—CREATE CONTENT

### Overview

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Chapter 4 covers how to create folders and items and move them around the Content Collection.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Create a Folder</a>	Provides instructions for creating a folder to store content.
<a href="#">Create an Item</a>	Explains how to upload an item into a folder.
<a href="#">Create External Link</a>	
<a href="#">Copy a Content Item or a Folder</a>	Reviews the copy feature for replicating an item or a folder in another part of the Content Collection.
<a href="#">Move an Item or a Folder</a>	Reviews the move feature for deleting an item or a folder and recreating it in another part of the Content Collection.
<a href="#">Remove an Item or a Folder</a>	Details how to delete items and folders.
<a href="#">Email an Item</a>	Explains how to email an item to another user.
<a href="#">Download Package</a>	Explains how Content System users can download items, including any associated metadata.
<a href="#">Upload Package</a>	Explains how Content System users can upload a previously downloaded package of Content System items and their associated metadata

## CREATE A FOLDER

### Overview

Folders are storage bins for other folders and items. Folders can be created within any folder. To create a folder a user must have Read and Write privileges in the folder that will hold the new folder. For example, if only the Instructor of a course has Read and Write privileges to that course's main folder, such as /courses/History, only the Instructor can create a folder there, for example, /courses/History/documents.

For more details on folders please see Folders and Items.

### Find this page

Follow these steps to open the Add Folder page.

1. Navigate to the folder that contains the new folder.
2. Click **Add Folder** on the Action Bar. If the **Add Folder** button does not appear (or is grayed out) if the user does not have permission to add a folder in the current location.

### Fields

The Add Folder page includes the following fields.

FIELD	DESCRIPTION
<b>Folder Information</b>	
<b>Folder Name [r]</b>	Enter the name of the folder.
<b>Quota Options (only appears if the user has Manage permissions)</b>	
<b>Space Available</b>	Display only field that shows how much space is available for the folder.
<b>Quota in Megabytes (M)</b>	Enter a space quota for the folder in megabytes (MB). The space quota cannot be larger than the quota for the folder in which the new folder resides. For example, the quota for /courses/history/documents cannot be larger than the quota for /courses/history.
<b>Inherited Quota</b>	Display only field that shows the quota for the folder in which the new folder resides. For example, when creating the folder /courses/history/documents this field shows the quota for /courses/history.
<b>Lock Options</b>	
<b>Lock Type</b>	Select a lock for the folder from the following options: <ul style="list-style-type: none"> <li>• No Lock</li> <li>• Lock This Folder</li> <li>• Lock this Folder and everything it contains</li> </ul>

FIELD	DESCRIPTION
<b>Comment Options</b>	
<b>Comments</b>	Select <b>Private</b> or <b>Shared</b> . Selecting <b>Private</b> limits comments to those users that have Manage privileges on the folder. Selecting <b>Shared</b> allows users with Read privileges to view and post comments.
<b>Version Options</b>	
<b>Versions</b>	Enable or Disable Versions.
<b>Tracking Options</b>	
<b>Tracking</b>	Enable or Disable Tracking.

## Locks

---

A lock secures the folder itself (name and settings) from changes. If **Lock This Folder** is selected, the items within the folder may be edited, but they may not be removed or moved. The option **Lock this Folder and everything it contains** protects both the folder itself and the materials it contains. If this option is selected, all subfolders and items within the folder will be locked. These folders and items may not be edited, moved, or removed. If a folder is locked, the user will also be unable to modify items within it through the Web Folder, for example, copying an item directly into the Web Folder.

## Download Folders

---

Users may download folders using the **Download Items** option in the drop-down list on the Action Bar. If the folder is downloaded to a .zip file, it appears if it includes items. If the folder is empty, the .zip file will not include the folder.

## CREATE AN ITEM

### Overview

---

Items are files stored in the Content Collection. Items can be created within any folder provided that the user creating the folder has Manage privileges in the folder that will hold the new item. For example, if only the Instructor of a course has manage privileges to that courses folder, for example, /courses/history, only the Instructor can create an item there, for example, /courses/history/history item.

For more details on items please see Folders and Items.

### Find this page

---

Follow these steps to open the Add Item page.

1. Navigate to the folder that contains the new item.
2. Click **Add Item** on the Action Bar. If the **Add Item** button does not appear you do not have permission to add an item in the current location.

### Fields

---

The following fields appear on the Add Item page.

FIELD	DESCRIPTION
<b>File Information</b>	
<b>File [r]</b>	Enter the path to the file that is uploaded to the Content Collection or click <b>Browse</b> to locate and select the file. The file name displays in the Content Collection.
<b>Overwrite if a file with the same name exists</b>	Check this box if the item should replace an item that already exists in the folder.
<b>Options</b>	
<b>Locked</b>	Select <b>Yes</b> to lock the item or <b>No</b> to keep the item unlocked. A lock prevents changes to the item. If a file is checked out, it is automatically locked.
<b>Comment Options</b>	
<b>Comments</b>	Select <b>Private</b> to prevent other users from posting comments about the item. Select <b>Shared</b> and those users with at least read permission can post comments.
<b>Version Options</b>	
<b>Versions</b>	Enable or Disable versions.
<b>Tracking Options</b>	
<b>Tracking</b>	Enable or Disable Tracking

## CREATE EXTERNAL LINK

### Overview

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Links to outside Web sites may be added to the Content Collection as External Links. These links are added from the Add External Link page. Once created, the Web site URL for the External Link can be modified.

### Find this page

---

Follow these steps to open the Add Item page.

1. Navigate to the folder that contains the new item.
2. Click **Add Link** on the Action Bar. The Add External Link page appears.

### Fields

---

The following fields appear on the Add Item page.

FIELD	DESCRIPTION
<b>File Information</b>	
<b>Link Name</b> [r]	Enter a name for the link. Do not enter the '%' and the '?' characters in this field.
<b>URL</b> [r]	Enter the full Web address to the link. When adding a URL, do so as http://www.blackboard.com, not www.blackboard.com or blackboard.com
<b>Lock Options</b>	
<b>Locked</b>	Select <b>Yes</b> to lock the item or <b>No</b> to keep the item unlocked. A lock prevents changes to the item. If a file is checked out, it is automatically locked.
<b>Comment Options</b>	
<b>Comments</b>	Select <b>Private</b> to prevent other users from posting comments about the item. Select <b>Shared</b> and those users with at least read permission can post comments.

### Modifying Links using Web Folders

---

Follow these steps to modify an External Link:

1. Click **Modify** next to the External Link to modify. The **Modify: External Link** page appears.
2. Click **Overwrite URL**. The **Overwrite External Link** page appears.
3. Enter the new Web site URL in the **URL** field.
4. Click **Submit**.

## COPY A CONTENT ITEM OR FOLDER

### Overview

---

Copying an item or a folder creates an exact replica of that item or folder in a different location or in the same location. The name of the item or folder remains the same if it is copied to a different location. If the copy is placed in the same folder as the original item or folder, the copy is named "Copy of," followed by the file or folder name.

If the name of the copied item matches the name of an item in the destination folder the Content Collection will prompt the user to confirm an overwrite. The same logic applies to folders, if a copied folder is given a name that matches a folder in the destination location the Content Collection will prompt the user to accept an overwrite of the existing folder with the copy.

It is possible to select multiple items and folders for copying, making it easy to share content between folders. This is especially useful when teaching different sections of the same course. Each section can have their own folder for different sets of users but start the course with the same content.

### Find this page

---

Follow these steps to open the Copy Item page or the Copy Folder page.

1. Navigate to the folder that holds the item or folder to be copied.
2. Check the item or folder (or multiple items and folders) to be copied.
3. Click **Copy** in the Action Bar.

### Fields

---

The Copy Item and Copy Folder pages contain the following fields.

FIELD	DESCRIPTION
<b>Content Information</b>	
	Information on the item or folder to be copied is displayed here for confirmation. The name of the item or folder, the size of the item or folder, and details on the last change made to the file are displayed.
<b>Destination</b>	
<b>Destination</b> [r]	Enter the path to the destination folder to store the copy of the item or folder including the name of the item or folder or click <b>Browse</b> to locate and select the destination folder.  Select the check box to replace any folders or items in the destination that share the same name as any folders or items that are moved into the destination.

## Permissions

---

To copy an item, the user must have Read permissions on the item being copied, and Write permissions in the location it is being copied.

To copy a folder, the user must have Read permissions to the folder being copied and all items within the folder, and Write permissions to the destination folder.

## MOVE AN ITEM OR FOLDER

### Overview

---

Moving folders and items removes the folders and items from the current location and stores them in a different location. It is possible to select multiple items and folders for moving, making it easy to transport large batches of content to new locations.

### Find this page

---

Follow these steps to open the Move Item page or the Move Folder page.

1. Navigate to the folder that holds the item or folder to be moved.
2. Check the item or folder (or multiple items and folders) to be moved.
3. Click **Move** in the Action Bar.

### Fields

---

The Move Item and Move Folder pages contain the following fields.

FIELD	DESCRIPTION
<b>Content Information</b>	
	Information on the item or folder to be moved is displayed here for confirmation. The name of the item or folder, the size of the item or folder, and details on the last change made to the file are displayed.
<b>Destination</b>	
<b>Destination</b> [r]	Enter the path to the destination folder to store the item or folder or click <b>Browse</b> to locate and select a folder. Select the check box to replace any folders or items in the destination that share the same name as any folders or items that are moved into the destination.

### Permissions

---

To move an item, the user must have Read and Remove permissions on the item being moved, and Write permissions in the location it is being copied.

To move a folder, the user must have Read permissions to the folder being moved, as well as, Remove permissions on the folder and all items within the folder. The user must also have Write permissions to the destination folder.

## REMOVE AN ITEM OR FOLDER

### Overview

---

Removing an item or a folder removes the item or folder from the Content Collection. It is possible to select multiple items and folders for removal, making it easy to delete large batches of content. Recycled items or folders are moved to the Recycle Bin.

### Remove items and folders

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Follow these steps to remove items and folders.

1. Navigate to the folder that holds the items or folders to be removed.
2. Check the item or folder (or multiple items and folders) to be removed.
3. Click **Recycle** in the Action Bar. The items or folders are moved to the Recycle Bin.

## EMAIL AN ITEM

### Overview

---

Users may send items to others through the Email Items page. The Email Items page sends an Email message to select outside users with the URL pass for accessing the content item.

### Find this page

---

Follow these steps to open the Email Items page.

1. Navigate to the folder that holds the item or folder to be moved.
2. Check the item to be emailed.
3. Select **Email Items** in the drop-down list in the Action Bar.

### Fields

---

The Email Items page includes the following fields.

FIELD	DESCRIPTION
<b>Message Details</b>	
<b>To [r]</b>	Enter the email addresses of all the people who will receive the item. Separate email addresses that appear in the same field with commas. The Cc: field is useful for alerting someone who is not the main recipient. The Bcc: field prevents other recipients from seeing the email addresses in this field.
<b>Cc</b>	
<b>Bcc</b>	
<b>From</b>	Displays the name of the person sending the email.
<b>Subject</b>	The default subject is "Your Name has sent you items to view." This may be edited.
<b>Message</b>	A default message appears in this field. Edit the message as you like but be careful not to delete or change the URL. If you edit or delete the URL, users are not able to access the item!

## DOWNLOAD PACKAGE

### Overview

---

Content System users can download items, including any associated metadata. The result is a .Zip file package that contains the full path structure of the files and folders as well as a single .XML file that defines the metadata for all files and folders in the package.

### Download an Item or Package

---

Follow these steps to download an item or a series of items:

1. Navigate to the folder in the Content System where the items are located.
2. Select the files and folders to download.
3. Select **Download Package** from the drop-down list. An **Opening \*.zip** dialog box appears.
4. Select **Save to Disk** and click **OK**.



**NOTE:** A single .XML file accompanies the downloaded files and folders called metadata.xml. This .XML file contains the metadata for all of the items downloaded.

### Editing the metadata

---

Once the item (or items) has been downloaded, the accompanying metadata.xml file can be edited outside of Blackboard. There are several things to keep in mind when editing this file:

- If a metadata field is added to the .XML file and there is no associated metadata attribute on a metadata form, the new field is saved but is not visible anywhere within Blackboard.
- The system will not upload the file if the .XML file is not properly formatted.

For more information, see Metadata.

## UPLOAD PACKAGE

### Overview

---

Content System users can upload a previously downloaded package of Content System items and their associated metadata. The result is that the files and folders overwrite the existing files or folders (either adding a new version or overwriting without new version) and the metadata.XML file in the package overwrites the metadata for each item specified.



**NOTE:** The package must be one that has been previously downloaded from the Content System and it must be in the form of .ZIP file.

### Upload a package

---

Follow these steps to upload a package to the Content System:

1. Select **Upload Package** from the drop-down list and click **Go**. The **Upload Package** page appears.
2. Select the .ZIP file to upload by clicking **Browse** next to the **File** field.
3. Click the checkbox next to **Overwrite if a file with the same name exists** if the files or folders in this package overwrite existing files and folders.
4. Click **Submit**.

## CHAPTER 5—USING PERMISSIONS

### Overview

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Once content is added to the Content Collection, permissions must be granted to make the content accessible to users and groups of users. Managing permissions on files and folders may be complicated since permissions behave both alone on single items and in combination with other permissions on folders. Users and user lists may be given different types of permissions to individual files and folders, ranging from read only access, to modifying, managing and removing content.

Chapter 5 describes permissions and how they are used in the Content Collection.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Permissions Overview</a>	Gives an overview of permissions.
<a href="#">Folders with Default Permissions</a>	Explains how default permissions work with folders.
<a href="#">Adding Permissions for an Item or Folder</a>	Explains how to add permissions for a user or user group to an item or folder.
<a href="#">Common areas of Confusion</a>	Explains some areas where permissions may be confusing.
<a href="#">Table of Permissions Required for Specific Actions</a>	A table of which permissions are required for certain actions

## PERMISSIONS OVERVIEW

### About Permissions

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Permissions enable users to read and perform actions on items and folders added to the Content Collection. Users must be granted permissions to access content directly from the Content Collection and also through links in courses and Portfolios. The following permissions are available within the Content Collection:

- **Read:** Users have the ability to view items or folders.
- **Write:** Users have the ability to make changes to items and folders.
- **Remove:** Users have the ability to remove items from the folder or the folder itself.
- **Manage:** Users have ability to control the properties and settings of items and folders.

### Grant permissions

---

Any user with Read and Manage permission on an item or folder may grant permissions to other users and user lists. If permissions are changed on a folder, the user must have Read and Manage permissions on the folder, but only Manage permission on items within the folder is necessary.

### Receive permissions

---

Users and groups of users, such as Course User Lists, may be granted one or more permissions. For example, Read permission for an item may be granted to an entire course list. The owner may grant additional permissions to single users within the course list, for instance, one user may be granted Write permission. Privileges may be modified for subfolders and items within a folder. Thus, Instructors and Students can work with items in the same folder and the Instructor can prevent certain items from being modified by a student.

### Smart permissions

---

Tools in the Content Collection are 'smart'. When a user searches for files or folders, or attempts to manipulate files or folders (for example, using copy, move or remove), he or she will only be able to view and alter content based on the existing permissions. For example, if a user searches for an item to which he or she does not have Read permission, the item will not appear in the Search Results.

## FOLDERS WITH DEFAULT PERMISSIONS

### About Default Permissions

---

Some users have default permissions to specific folders. In this case, various permissions are automatically granted to specific folders.

**User folders** – These folders appear under My Content in the Content Collection menu. A user has Read, Write, Manage, and Remove permissions to his or her user folder. The Administrator determines the availability of these folders on a system-wide basis. If the Blackboard Portal System is installed, the Administrator may make folders available to users with specific institution roles.

**Course folders** – These folders appear under the Courses area on the Content Collection menu and are used to store content for specific courses. Instructors, Teaching Assistants and Course Builders have Read, Write, Manage, and Remove permissions to the folders for their courses. The course folder is automatically created on the system the first time one of these users accesses the Content Collection. Other course users (such as Students) who are enrolled in a course do not see this folder because it is intended to be a workspace for course developers. Students must be given Read permissions to a course folder for it to be accessible to them. Organization folders function in the same way as course folders.



**NOTE:** This feature is only available if the System Administrator enables Portfolios.

**Institution and Library Content folders** - All users with system accounts have Read permission to these folders.

**Course folders within eReserves** – All users enrolled in a course (All Course Users) have Read permissions to the specific course folder in eReserves.

## ADDING PERMISSIONS TO AN ITEM OR FOLDER

### Add permissions to an item or folder

Permissions are added and removed on the Modify Permissions page for an item or folder. Follow the steps below to add permissions to an item for user:

1. Open the Content Collection folder where the item is located (for example, /users).
2. Select **Modify** next to the item. The Modify page appears.
3. Select **Permissions**. The Modify Permissions page appears.
4. Select **Add Users**. The Add User page appears.
5. Complete the Add User page with the following information:

FIELD	DESCRIPTION
<b>Username</b>	Enter the usernames for one or more users or select <b>Browse</b> to locate users in the system.
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users.

Permissions may also be added for user lists, such as All System Accounts or a Course List. Follow the steps below:

Open the Content Collection folder where the item is located (for example, /users).

1. Select **Modify** next to the item. The Modify page appears.
2. Select **Permissions**. The Modify Permissions page appears.
3. Select a user list in the drop-down list on the Action Bar. The Add User List page appears.
4. Complete and submit the Add User List page



**NOTE:** If permissions are added for a user or user list but no check boxes for specific permissions (Read, Write, Manage, and Remove) are selected, the user or user list is still added to the Manage Permissions page. This is true for all users and user lists with the exception of Public and All System Accounts. In these cases the user list is not added to the Manage Permissions page if no permissions are selected.

---

### Granting permissions to folders v. items

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Permissions granted to a folder may or may not affect items and subfolders within the folder. An additional option, **Overwrite**, appears on the Permission pages for folders, allowing the user to choose how the contents of a folder are affected when Permissions are modified.

If the **Overwrite** option is selected, the current permissions for all items and subfolders in the folder are removed. The permissions selected in the **Permissions** field are granted to these items and subfolders. After modifying permissions on a folder, the user may change the permissions on an item within the folder. These permissions will be overwritten if Overwrite is selected for the parent folder again.

If this option is not selected, the permissions selected in the Permissions field are granted to all items and sub folders, but existing permissions are not removed. For example, if an item already has Read permission, and only Write permission is selected on the Add Users page, the item will be granted Read and Write permission.

## COMMON AREAS OF CONFUSION

### Overview

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There are some common scenarios where users may be confused about permissions.

### Viewing files and folders

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Usually when an item or folder is not displayed to a user it is because the user does not have Read permission. However, there are a few common instances where a user cannot see a file or folder because of other system rules:

SITUATION	REASON
A user is enrolled in a class, but the course folder does not appear under Courses or e-Reserves.	<p>Course folders are not created in the Content Collection until the Instructor, Teacher's Assistant, or Course Builder has accessed the Content Collection.</p> <p>Once this happens, the course folder appears to enrolled users under e-Reserves. Read permission must be granted to the user before the course folder appears under Courses.</p>
A user is enrolled in an organization, but the organization folder does not appear under e-Reserves.	Organizations do not have folders under e-Reserves; only course folders appear under e-Reserves.
A user can view all of the content of his or her Portfolio; but a user with whom this Portfolio is shared cannot view all of the files linked to in the Portfolio.	<p>The Portfolio User List no longer has Read permission to all items linked to in the Portfolio.</p> <p>When the Portfolio was originally created and shared, the users with whom it was shared were added to the Portfolio User List and granted Read access to all items linked to in the Portfolio. Since then, Read access has been removed from one or more of these items; when the user accesses the items through the Portfolio he or she is unable to view them. A user with Read and Manage permission to the file must add Read permission for the Portfolio User List to each item where this permission has been removed.</p>
A user can view a folder, but not all of its contents	The user has Read access to the folder, but not to its contents.

## Performing actions on files or folders

---

Usually when a user cannot perform an action on a file or folder it is because he or she does not have the correct permissions. However, there are a few common instances where this may be confusing:

SITUATION	REASON
A user has Manage permission on an item, but is unable to copy it to a different folder.	The user does not have Write permission on the destination folder.
A user may view a file or folder but is unable to link to it from a Portfolio.	The user only has Read access to the file or folder; Manage access is required to link the file or folder to a Portfolio. <b>Note:</b> The user does not need Manage permissions to items added from the /institution folder because All System Accounts have Read permissions to /institution. The system assumes that if All System Accounts have Read access, anyone may link to it.

## TABLE OF PERMISSIONS REQUIRED FOR SPECIFIC ACTIONS

### About of permissions for specific actions

The following table explains which permissions are required for specific actions. In the case of folders, the user generally needs the permission on the folder and all its contents, subfolders and their contents.



**NOTE:** Read permission on subfolders is not always necessary, as long as the user has Read permission on the folder he or she is working with, and has other necessary permissions to the folder and its content. For example, if a user has Read and Remove permission on a parent folder and only Remove permission on the subfolder, the parent folder (including the subfolder) may be removed. In this case, the user may not remove only the subfolder because the user cannot Read it.

ACTION	REQUIRED PERMISSIONS
Add a file or folder	Read and Write permission on the current folder
Add, Modify or Remove permissions	Read and Manage permissions on an item
View permissions	Read and Manage permissions on an item
Download a file or folder	Read permission on file or folder and all items and folders within the folder to be downloaded.
Email a file or folder	Read permission on the item or folder
View properties for a file or folder	Read permission on the item
Copy a file or folder	Read permission on the item (and all its subfolders and files in the case of folders) and Write permission on the destination folder
Modify properties for a file or folder	Read and Write permissions on the item
Move a file or folder	Read and Remove permissions on the item to be moved, Write on the destination folder
Remove a file or folder	Read and Remove permissions on the item
Lock and unlock a file or folder	User must have Read and Write on permissions the item. Only the lock owner (the user who set the lock) may unlock an item.
Add a comment to or view a comment on a file or folder	Read permission on the item or folder if Comments are shared. Read and Manage permissions on the item or folder if Comments are private
Bookmark a file or folder	Read permission on the item

ACTION	REQUIRED PERMISSIONS
Tracking – enable/disable	Read and Manage permissions on the item
Versions- checkout a file	Read and Write permissions on the item
Versions- check in a file	A version is locked when the file is checked out; only the lock owner (person who checked out the file) may check it in. User must have Read and Write permissions on the item.
Version – remove a file	Read, Write, and Remove permissions on item
Version – rollback a file	Only the lock owner (person who checked out the file) may rollback a version. User must have Read and Write permissions on the item.
Workflow – add a file	Read and Manage permissions on the item
Workflow – add a comment	User must be the Workflow Activity owner or recipient
Workflow – modify a file	User must be the Workflow Activity owner
Workflow – remove a comment from a sent or received Workflow Activity	User must be the Workflow Activity owner or the user who submitted the comment

## CHAPTER 6—MANAGE FOLDERS

### Overview

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This chapter details how to apply settings to a folder and share the folder with other users.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Find Folder</a>	Explains how to find and add folders to which a user has Read permission.
<a href="#">Remove from Display</a>	Explains how to remove folders added through the Find Folder option.
<a href="#">Edit Folder Properties</a>	Describes the control settings available for a folder.
<a href="#">Manage Permissions for a Folder</a>	Details the administration of permissions for a folder.
<a href="#">Add a User to a Folder</a>	Provides instructions for granting users access to a folder.
<a href="#">Add a Course or Organization User List to a Folder</a>	Provides instructions for granting user lists from a Course or Organization access to a folder.
<a href="#">Add an Institution Role User List to a Folder</a>	Provides instructions for granting users with specific Institution Roles access to a folder.
<a href="#">Add Public to a Folder</a>	Provides instructions for granting public users access to a folder.
<a href="#">Add All System Accounts to a Folder</a>	Provides instructions for granting all users with system accounts access to a folder.
<a href="#">Add Course or Organization Groups to a folder</a>	Provides instructions for granting all users in a course or organization Group access to a folder.
<a href="#">Modify Folder Permissions</a>	Provides instructions for changing the permissions assigned to a user or a group of users.
<a href="#">Comments</a>	Provides links to areas for managing Comments.
<a href="#">Set Private / Shared Comments</a>	Describes how to make comments on the folder private or shared.
<a href="#">Add Comments to a Folder</a>	Describes how to add and manage folder comments.

## FIND FOLDER

### Overview

---

When users open the Content Collection their user folder and the folders for courses and organizations in which they are enrolled are automatically displayed. The Find Folder page allows users to search for and display child folders to which they have at least Read permission within the top-level folders. For example, if an Instructor gives a user permission to a course folder in which the user is not enrolled, the user may use this tool to display the course folder in their Content Collection menu. This tool may not be used to display a subfolder within the Course folder.

This option is available in the following top-level folders:

- Users
- Courses
- Organizations
- e-Reserves

This tool is especially useful for e-Reserve librarians, who may have permission to a number of course folders in e-Reserves. This tool allows the librarian to display these folders under the e-Reserves folder in the Content Collection menu without enrolling in the courses.



**NOTE:** See the Manage Permissions for a Folder topic for details about adding, modifying, and removing permissions for folders.

### Find this page

---

Follow these steps to open the Find Folder page.

1. Select a top-level folder, such as Users or Courses.
2. Select **Find Folder** in the Action Bar.

### Functions

---

Enter the search criteria in the field that appears on the Find Folder page. For example, if **Find Folder** is selected in the user's folder, enter the usernames for the user folders to add. **Browse** may be used to search for any valid user, course or organization folder. If the appropriate permissions have not been granted, the user will be unable to add the folder.

The user must have at least Read permission on the user, course, or organization folder to add the folder to their folder tree. For example, if the user 'JSmith' has Read permission on an item in the user folder for 'LJones', a search on LJones conducted by JSmith will not be successful. LJones must grant JSmith permissions on the top-level of the LJones folder. In this case, the search would be successful.

Upon submit, the folder is added if the appropriate permission has been granted. To view the changes in the Content Collection menu, click **Refresh** on the bottom of the menu.



**NOTE:** If the user is not enrolled in any courses or organizations, the Find Folder option is not available in Courses or Organizations on the Content Collection menu.

**Permissions removed**

---

If a user's permissions for a folder are removed, the folder will be removed from the Content Collection menu. For example, if LJones removes the permissions for JSmith from his user folder, the LJones folder will automatically disappear from the Content Collection menu for JSmith.

## REMOVE FROM DISPLAY

### Overview

---

Folders that are added through Find Folder may be removed from the display. Removing a folder from the display removes a folder from the Content Frame; the folder is not removed from the Content Collection. This option is only used to remove folders that have been added using the Find Folder option.

### Remove folders

---

Follow these steps to remove folders:

1. Navigate to the top-level folder (such as Courses) where the folders to be removed are stored.
2. Check folder (or multiple folders) to be removed and click **Remove from Display**.

## EDIT FOLDER PROPERTIES

### Overview

---

After a folder has been created, its settings can be changed from the Properties page. For example, if a folder is initially created with a lock on it, the lock can be removed from this page. The Properties page is also the place to look for detailed information about the folder, such as who created the folder and when the folder was created and last modified.

### Find this page

---

Follow these steps to open the Properties page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify: Folder Name page appears.
3. Click **Properties**.

### Fields

---

The Properties page contains the following fields.

FIELD	DESCRIPTION
<b>Folder Information</b>	
<b>Folder Name</b>	View or change the name of the folder.
<b>URL</b>	The URL of the folder. This URL can only be accessed by users with an active user account and privileges to view the folder.
<b>Owner</b>	Displays the Username of the person responsible for the maintaining the folder and its contents.
<b>Created By</b>	Displays the Username of the person who created the folder.
<b>Created On</b>	Displays the date and time the folder was created.
<b>Last Modified By</b>	Displays the Username of the person who last made changes to the folder.
<b>Last Modified</b>	Displays the latest date and time that changes were made to the folder.
<b>Quota Information</b>	
<b>Size</b>	Displays the size of the folder in megabytes.

FIELD	DESCRIPTION
<b>Quota in Megabytes</b>	Enter a space quota for the folder in megabytes (MB). The space quota can not be larger than the quota for the folder in which the new folder will reside. For example, the quota for /courses/history/documents cannot be larger than the quota for /courses/history.
<b>Available Quota</b>	Display only field that shows the amount of available space for the folder in which the new folder will reside. For example, when creating the folder /courses/history/documents this field will show the space available for /courses/history.  The quota for a folder cannot exceed the available space in the folder that will hold it.
<b>Lock Options</b>	
<b>Lock</b>	Select a lock for the folder from the following options: <ul style="list-style-type: none"> <li>• No Lock</li> <li>• Lock This Folder</li> <li>• Lock this Folder and everything it contains</li> </ul> <p>A lock secures the folder itself (name and settings) from changes. Locking the folder and all its contents protects both the folder itself and the materials it contains.</p> <p>If a folder is locked, the user will be unable to modify items through the Web Folder, for example, copying an item directly into the Web Folder.</p>
<b>Version Options</b>	
<b>Versions</b>	Enable or disable versions.
<b>Tracking Options</b>	
<b>Tracking</b>	Enable or disable tracking.

### Locking subfolders

Folders may contain a number of items and subfolders. Unlocking a subfolder may change the lock type of the parent folder. If a user changes a subfolder lock to **No Lock** from **Lock this folder and everything it**, the parent folder will automatically also be set to **No Lock**, even if the option **Lock this folder and everything it** had been previously selected. Similarly, subfolders should not be locked if a parent folder is already locked. This action will break the lock on the parent folder, and set it to **No Lock**, leaving the subfolder locked and the parent folder unlocked.

## MANAGE PERMISSIONS FOR A FOLDER

### Overview

---

User access to a folder is controlled through the Manage Permissions page. Users can be added individually with separate permissions assigned to each user or users can be added in groups, such as all the users enrolled in a particular course or all the users with a certain institution role. These groupings are derived automatically from the *Blackboard Learning System*.

### Find this page

---

Follow these steps to open the Manage Permissions page for a folder.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Manage Folder page appears.
3. Click **Permissions**.

### Permissions types

---

Users or groups of users can have none, one, or many of the following permissions. If a group or user does not appear on the list they do not have permission to access the folder or its contents.

- **Read:** Ability to view content items within the folder unless explicitly prevented from doing so by the permissions of a particular item.
- **Write:** Ability to make changes to content items within the folder unless explicitly prevented from doing so by the permissions of a particular item.
- **Remove:** Ability to remove items from the folder unless explicitly prevented from doing so by the permissions of a particular item.
- **Manage:** Ability to control the properties and settings of items within the folder unless explicitly prevented from doing so by the permissions of a particular item.

### Managing folder permissions

---

When permissions are granted on a folder, they apply to all subfolders and items within the folder. For example, if Read permission is granted for a user on a folder, the user will also have Read permission to all subfolders and items within the folder. Read permission may then be removed from specific subfolders and items. Thus, Instructors and students can work with items in the same folder and the Instructor can protect certain items from being modified by a student.

### Functions

---

The Manage Permissions page for a folder includes the following functions.

To . . .	CLICK . . .
Add a user	<b>Add User</b> in the Action Bar. The Add User page for the folder appears. From this page a user can be added and permissions set for that user.

To . . .	CLICK . . .
Add a list of users	the drop-down list next to the <b>Go</b> button and select a type of user list. Click <b>Go</b> and the Add User List for that folder appears. From this page a list of users can be added and permissions set.
Remove a user or a list of users	the check box next to the user or user list then click <b>Remove</b> in the Action Bar. All of the selected users and lists will have their permissions removed. Once permissions are removed, the users can no longer access the folder.
Modify the permissions for a group	<b>Modify</b> at the end of the row for the appropriate user or group. The Modify Permissions page appears.

## ADD A USER TO A FOLDER

### Overview

---

Adding users to a folder allows the user to access the folder according to the permissions set.

### Find this page

---

Follow these steps to open the Add User page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Manage** in the same row as the folder to be modified. The Manage Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Click **Add User** from the Action Bar to add selected users.

### Fields

---

The Add User page includes the following fields:

FIELD	DESCRIPTION
<b>Choose Users [r]</b>	Individual users can be added by entering each user's Username or using the search function to find each user to include. Multiple usernames, separated by commas, may be entered.
<b>Set Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, please see <a href="#">Manage Permissions for a Folder</a> .
<b>Advanced Folder Options</b>	<p>If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.</p> <p>If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.</p>

## ADD A COURSE OR ORGANIZATION USER LIST TO A FOLDER

### Overview

---

Adding users from a course to a folder allows the users to access the folder according to the permissions set.

### Find this page

---

Follow these steps to open the Add Course User List page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Select **Course User List** from the drop-down list and click **Go**.

### Fields

---

The Add Course User List page includes the following fields:

FIELD	DESCRIPTION
<b>Choose Courses</b>	
<b>Courses</b> [r]	Check each box for the course user lists to include.
<b>Additional Courses</b>	Individual courses can be added by entering each course's Course ID or using the search function to find each user to include. Multiple courses, separated by commas, may be entered.
<b>Choose Roles</b>	
<b>Roles</b> [r]	Check each box for the user roles that will be granted permissions.
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. See <a href="#">Manage Permissions for a Folder</a> for a description of each permission.
<b>Advanced Folder Options</b>	
If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.	
If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.	

## ADD AN INSTITUTION ROLE USER LIST TO A FOLDER

### Overview

---

Adding Institution Roles to a folder allows users with specific roles to access the folder according to the permissions set.

### Find this page

---

Follow these steps to open the Add Institution Role User List page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Select **Institution Role User List** from the drop-down list and click **Go**.

### Fields

---

The Add Institution Role User List page includes the following fields:

FIELD	DESCRIPTION
<b>Choose Roles</b>	
<b>Institution Roles</b> [r]	This folder is available to users with roles that appear in the <b>Selected Roles</b> box. Select which roles will have access the folder in the <b>Available Roles</b> box and use the arrows to move these roles to the <b>Selected Roles</b> box.
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see <a href="#">Manage Permissions for a Folder</a> .
<b>Folder Options</b>	
If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.	
If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.	

## ADD PUBLIC TO A FOLDER

### Overview

---

Adding public permissions to a folder allows users with accounts on the system, as well as people in the general public, to access the folder according to the permissions set.

### Find this page

---

Follow these steps to open the Add Public page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Select **Public** from the drop-down list and click **Go**.

### Fields

---

The Add Public page includes the following fields:

FIELD	DESCRIPTION
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, please see <a href="#">Manage Permissions for a Folder</a> .
<b>Advanced Folder Options</b>	
If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.	
If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.	

## ADD ALL SYSTEM ACCOUNTS TO A FOLDER

### Overview

---

Adding all system account permissions to a folder allows all users with accounts on the system to access the folder according to the permissions set.

### Find this page

---

Follow these steps to open the Add All System Accounts page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Select **All System Accounts** from the drop-down list and click **Go**.

### Fields

---

The Add All System Accounts page includes the following fields:

FIELD	DESCRIPTION
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, please see <a href="#">Manage Permissions for a Folder</a> .
<b>Advanced Folder Options</b>	
If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.	
If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.	

## ADD COURSE AND ORGANIZATION GROUPS TO A FOLDER

### Overview

Adding Group permissions to a folder allows users in a course Group to access the folder according to the permissions granted. Groups are set up by Instructors within *Blackboard Learning System* courses and organizations. For example, if a user is a member of a Study Group in a course, this option allows him or her to grant all members of the Study Group permission to Content Collection folders and files.

### Find this page

Follow these steps to open the Add Groups page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Select **Course Groups User List** or **Organization Group User List** from the drop-down list and click **Go**.

### Fields

The Add Groups page includes the following fields:

FIELD	DESCRIPTION
<b>Course Groups</b>	A list of all Groups for courses the user is enrolled in appears. Select the check box for each group that is granted permissions to view this folder.
<b>Set Permissions</b>	
<b>Permissions</b>	Select the check box for the permissions that will be applied to the user or users. For a full description of each permission, please see <a href="#">Manage Permissions for a Folder</a> .
<b>Advanced Folder Options</b>	
	If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.
	If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.

**Additional Notes**

---

Changes in courses and Groups may affect the use of this option.

- If a Group is deleted from a course, the Group will no longer appear on this page and the permissions will be removed.
- If a course is made unavailable, the Groups related to this course will still appear on this page and permissions will remain.
- If a course is disabled, the Groups will not longer appear on this page and permissions will be removed.

## MODIFY FOLDER PERMISSIONS

### Overview

---

Modifying folder permissions changes the permissions for a user or group of users. For detailed information on permissions please see [Manage Permissions for a Folder](#).

### Find this page

---

Follow these steps to open the Modify Permissions page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Modify Folder page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Click **Modify** next to the User or User list to modify.

### Fields

---

The following fields appear on the Modify Permissions page.

FIELD	DESCRIPTION
<b>Modify Permissions</b>	Displays the user or group that will be modified.
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see <a href="#">Manage Permissions for a Folder</a> .
<b>Advanced Folder Options</b>	
	If <b>Overwrite</b> is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the <b>Permissions</b> field are granted to these items and subfolders.
	If this option is not selected, the permissions selected in the <b>Permissions</b> field are granted to items and subfolders, but existing permissions are not removed.

### Permissions Warning

---

Modifying permissions may impact users who access a folder through a course or Portfolio. For example, if a folder is linked to in a Portfolio and Read permission is removed for the Portfolio User List, a broken link appears when users attempt to access the folder through the Portfolio.

When a user modifies the permissions on a folder that is shared with a Portfolio or course, a warning appears indicating that this action will break existing links to the folder. The user can cancel the action or choose to continue.

## COMMENTS

### Overview

---

Comments allow users to store opinions or instructions regarding the contents of the folder.

### Find this page

---

Follow these steps to open the Comments page.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Manage Folder page appears.
3. Click **Comments**. The Comments page appears.

### Functions

---

The Comments page includes the following functions.

To . . .	CLICK . . .
set whether comments are private or shared	<b>Set Private/Shared Comments.</b> The <a href="#">Set Private/Shared Comments</a> page appears.
add and manage comments	<b>Manage Comments.</b> The <a href="#">Comments</a> page appears.

## SET PRIVATE / SHARED COMMENTS FOR A FOLDER

### Overview

---

Comments are useful for storing opinions or instructions from users regarding the contents of a folder. The Set Private/Shared Comments page for a folder sets whether or not users can add comments to a folder.

### Find this page

---

Follow these steps to open the Set Private/Shared Comments page for a folder.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Manage Folder page appears.
3. Click **Comments**. The Comments page appears.
4. Select **Set Private/Shared Comments**.

### Field

---

Select **Private** to prevent other users from posting comments about the folder. Select **Shared** and those users with at least read permission can post comments.



**NOTE:** If permissions are granted to another user for this folder, the user must have write permissions to modify the option on the Set Private/Shared Comments page.

## ADD COMMENTS TO A FOLDER

### Overview

---

Comments store text from users. Comments are useful for storing opinions or instructions regarding the contents of a folder. The setting for controlling whether or not users can add comments to a folder appears on the [Set Private/Shared Comments](#) page.

### Find this page

---

Follow these steps to open the Comments page for a folder.

1. Navigate to the folder that contains the folder to be modified.
2. Click **Modify** in the same row as the folder to be modified. The Manage Folder page appears.
3. Click **Comments**. The Comments page appears.
4. Select **Manage Comments**.

### Functions

---

The following functions are available on the Comments page.

To . . .	CLICK . . .
post a comment	<b>Add New Comment</b> from the Action Bar. A text box appears. Enter a comment and click <b>Submit</b> .
remove a comment	the check box in the same row as the comments to be deleted and select <b>Remove</b> .
sort comments	the carat above a column to sort comments by that column.

## CHAPTER 7—MANAGE ITEMS

### Overview

---

This chapter details how to apply settings to an item and share the item with other users.

### In this chapter

---

This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Edit Item Properties</a>	Describes the control settings available for an item.
<a href="#">Overwrite File</a>	Explains how to overwrite the item with another file.
<a href="#">Metadata</a>	Provides links to add different types of metadata to an item.
<a href="#">General Metadata</a>	Explains how to link defining attributes, such as name and description, to an item.
<a href="#">IMS Metadata</a>	Explains how to enter attributes that correspond to the IMS Metadata standards.
<a href="#">Full IMS Metadata</a>	Describes how to take advantage of the Full IMS Metadata fields.
<a href="#">Dublin Core Metadata</a>	Explains how to enter attributes that correspond to the Dublin Core Metadata standards.
<a href="#">Custom Metadata</a>	Explains how to create attributes that are specific to the institution.
<a href="#">Metadata Attributes</a>	Describes how existing attributes may be added to metadata templates and how to create new attributes.
<a href="#">Metadata Template Creation</a>	Explains how users can create custom metadata templates that can be applied to any folder and its contents.
<a href="#">Modifying Metadata Templates</a>	Details how users can create remove and customize the fields that are used on metadata templates.
<a href="#">Manage Versions</a>	Provides instructions for creating and managing versions.
<a href="#">Manage Permissions for an Item</a>	Details the administration of permissions for an item.
<a href="#">Add a List of Users to an Item</a>	Provides instructions for granting users access to an item.

TOPIC	DESCRIPTION
<a href="#">Modify Item Permissions</a>	Provides instructions for changing the permissions assigned to a user or a group of users.
<a href="#">Tracking</a>	Explains the tracking feature and how to use it to view other users' interactions with the item.
<a href="#">Comments</a>	Describes how to add and manage comments for an item.
<a href="#">Add Catalog Entry</a>	Explains how to submit an entry to the Learning Objects Catalog.

## EDIT ITEM PROPERTIES

### Overview

---

After an item has been created, its settings can be changed from the Edit Item Properties page. For example, if an item is initially created with a lock on it, the lock can be removed from this page. The Edit Properties page is also the place to look for detailed information about the item, such as who created the item and when the item was created and last modified.

### Find this page

---

Follow these steps to open the Properties page.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The **Modify Item** page appears.
3. Click **Properties**.

### Fields

---

The Properties page includes the following fields.

FIELD	DESCRIPTION
<b>File Information</b>	
File Name [r]	View or change the name of the file. Changing the name of a file will break any links to the file, including passes.
Location URL	The web link for this file that includes its full location path.
Permanent URL	The web link for this file that includes the unique, immutable identifier for it but not its location path. These persistent identifiers mean that links to Content System items no longer break.
File Type	Displays the type of file. This field may be modified.
File Size	Displays the size of the file, in KB.
Owner	Displays the Username of the person responsible for the maintaining the item.
Created By	Displays the Username of the person who created the item.
Created On	Displays the day, date, and time the item was created.

<b>FIELD</b>	<b>DESCRIPTION</b>
Last Modified By	Displays the Username of the person who last made changes to the item.
Last Modified	Displays the latest day, date, and time that changes were made to the item.
<b>Options</b>	
Lock File	Enable or disable file locking.
Share Comments	Enable or disable comment sharing.
Enable Versioning	Enable or disable versions.
Enable Tracking	Enable or disable tracking.

## OVERWRITE FILE

### Overview

---

After an item has been created, the user may decide to overwrite it with another file. This may be done on the Overwrite File page. Overwriting a file does not change the name of the file. Users must have read, write and remove permissions to a file to overwrite it.



**NOTE:** Users should not overwrite a file with a different file type, for example, a .doc file should not be overwritten with a .jpg file.

### Find this page

---

Follow these steps to open the Overwrite File page.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Overwrite File**.

### Field description

---

Enter the path to the file that will be uploaded to the Content Collection or click **Browse** to locate and select the file. The file name will display in the Content Collection.



**NOTE:** If a file that has a Bookmark is overwritten, the file must be refreshed before the new file appears when the Bookmark is selected.

### Using Versioning and Overwrite File

---

If Versioning is enabled on a file, and **Overwrite File** is selected (or the **Overwrite** checkbox on the Add Item page is selected), a new version is created and the old version is stored in Version history.

If Versioning is disabled, Overwrite File will overwrite the file and no history of past versions will be stored.

## METADATA

### Overview

Metadata is descriptive information about an item. Different types of metadata may be entered for an individual item. The Metadata page offers users a menu of the available types of metadata. The Content System includes four Metadata Templates: Dublin Core, Full IMS, General, and IMS. These templates can be made available to all users and modified but not removed from the system.



**NOTE:** Folders and Items can be imported and exported with their associated metadata.

### Find this page

Follow these steps to open the Metadata page.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**.

### Functions

The Metadata page includes the following functions.

To . . .	CLICK . . .
add Dublin Core Metadata	<b>Dublin Core Metadata.</b> The <a href="#">Manage Dublin Core metadata</a> page appears. From this page IMS metadata based on Dublin Core Metadata Element Set, version 1.1 may be added.
add Full IMS metadata	<b>Full IMS Metadata.</b> The <a href="#">Manage Full IMS metadata</a> page appears. From this page IMS metadata based on IMS Learning Objects Metadata, version 1.2.1 may be added, including all fields available on the IMS Learning Resource Meta-Data Information Model.
add general metadata	<b>General Metadata.</b> The <a href="#">General Metadata</a> page appears. From this page metadata, such as keywords, may be added
add IMS metadata	<b>IMS Metadata.</b> The <a href="#">Manage IMS metadata</a> page appears. From this page IMS metadata based on IMS Learning Objects Metadata, version 1.2.1 may be added.
add Custom Metadata	<b>Custom Metadata.</b> The <a href="#">Custom Metadata</a> page appears.

## MANAGE GENERAL METADATA

### Overview

---

Metadata is descriptive information about an item. Metadata can be used in searches within the Content Collection or to ensure that an item is interoperable with other systems. The Manage General Metadata page allows users to enter general information about the item.

### Find this page

---

Follow these steps to open the Manage General Metadata page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**. The Metadata menu page appears.
4. Select **General Metadata**.

### Fields

---

The Manage General Metadata page includes the following fields. All fields on this page are optional.

FIELD	DESCRIPTION
<b>General Descriptive Information (Optional)</b>	
<b>Name</b>	Enter a name for the item. This name will not change the file name of the item.
<b>Description</b>	Enter a description for the item.
<b>Keywords</b>	List keywords associated with the item separated by commas.
<b>Learning Objectives</b>	List Learning Objectives associated with the item separated by commas.

## MANAGE IMS METADATA

### Overview

---

The Manage IMS Metadata page allows users to enter attributes that correspond to the IMS Metadata standard. Additional information about the standard can be found at <http://www.imsglobal.org>.

### Find this page

---

Follow these steps to open the Manage IMS Metadata page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**. The Metadata menu page appears.
4. Select **IMS Metadata**.

### Fields

---

The Manage IMS Metadata page includes the following fields. All fields on this page are optional.

FIELD	DESCRIPTION
<b>IMS Metadata (Optional)</b>	
<b>Identifier</b>	A unique label for the item.
<b>Catalog Type</b>	A library catalog type in which this item is catalogued.
<b>Catalog Entry</b>	The catalog number for this specific item.
<b>Language</b>	The language the language of the item.
<b>Resource Type</b>	The type of resource, such as Exercise, Simulation, Questionnaire, Diagram, Figure, Graph, Index, Slide, Table, Narrative Text, Exam, Experiment, Problem Statement, Self Assessment
<b>Educational Context</b>	The typical learning environment where use of the learning object is intended to take place. For example, Primary Education, Secondary Education, Higher Education, University First Cycle, University Second Cycle, University Postgrade, Technical School First Cycle, Technical School Second Cycle, Professional Formation, Continuous Formation, Vocational Training
<b>Age Range</b>	The age range for the intended users.
<b>Difficulty</b>	Indicate the level of difficulty of this item.
<b>Free Resource</b>	Select <b>Yes</b> if this item is free, select <b>No</b> if it is not.
<b>Restricted Use</b>	Select <b>Yes</b> if use of this item is restricted, select <b>No</b> if it is not.

## MANAGE FULL IMS METADATA

### Overview

---

The Manage Full IMS Metadata page allows users to take advantage of all the fields available on the IMS Learning Resource Meta-Data Information Model. Additional information about the standard can be found at <http://www.imsglobal.org>.

### Find this page

---

Follow these steps to open the Manage Full IMS Metadata page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**. The Metadata menu page appears.
4. Select **Full IMS Metadata**.

### Add IMS Metadata to a Content System Item

---



**NOTE:** All of the fields on the IMS Metadata page are optional.

Follow these steps to add Full IMS metadata to a Content System item:

1. Enter appropriate information in the fields on the Full IMS Metadata page. For a complete list of fields, refer to the next section.
2. Click the **Add** link to add another option to the field. The new option appears below the field with a checkbox next to it. To remove the option, click the checkbox and click **Remove**.

### Fields

---

The Manage IMS Metadata page includes the following fields. All fields on this page are optional.

FIELD	DESCRIPTION
<b>General Metadata</b>	
General Identifier	A unique label for the item.
General Title	The title for the item.
General Catalog	A library catalog type in which this item is catalogued.
General Entry	The catalog number for this specific item.
General Language	The language of the item.

FIELD	DESCRIPTION
General Description	A general description for the item.
General Keyword	The description of the item relative to its stated purpose.
General Coverage	The historical context of the item.
General Structure	The structure of the item.
General Aggregation Level	The functional size of the resource. Select 1–4 from the drop-down list.
<b>Lifecycle</b>	
Lifecycle Version	The edition of the item.
Lifecycle Status	The editorial condition of the item.
Lifecycle Role	The kind of contribution.
Lifecycle Entity	The individual entity or entities involved with the item. Examples include author, publisher, or university department.
Lifecycle Date	Date of contribution in the lifecycle.
<b>Metametadata</b>	
Metametadata Identifier	A unique label for the meta-data.
Metametadata Catalog	The source of a following string value.
Metametadata Entry	A feature of the description rather than the resource.
Metametadata Role	The kind of contribution.
Metametadata Entity	The entity or entities involved, most relevant first.
Metametadata Date	Date of contribution.
Metametadata Metadata Scheme	The structure of the metadata, including version.
Metametadata Language	The language of the item.
<b>Technical</b>	
Technical Format	The technical data of the item. Examples include PDF, database file, or Word document.
Technical Size	The size of the item in bytes. Only the digits 0–9 should be used; the unit is bytes, not MBytes, GB, etc.
Technical Location	The location of the item in the Content System.
Technical Type	The type of requirement.

FIELD	DESCRIPTION
Technical Name	The name of the required item.
Technical Minimum Version	The lowest version of the required item.
Technical Maximum Version	The highest version of the required item.
Technical Installation Remarks	Description on how to install the item.
Technical Other Platform Requirements	Any special need to access the item. An example is the Adobe Reader which is needed to access a PDF file.
Technical Duration	The time a continuous item takes when played at intended speed, in seconds.
<b>Educational</b>	
Educational Interactivity Type	The type of interactivity supported by the item.
Educational Learning Resource Type	The specific kind of resource, most dominant kind first.
Educational Interactivity Level	The level of interactivity between an end user and the learning object.
Educational Semantic Density	The subjective measure of the learning object's usefulness as compared to its size or duration.
Educational Intended User Role	The type of user of the item. Examples include instructor, student, and librarian.
Educational Context	The typical learning environment where use of the learning object is intended to take place. For example, Primary Education, Secondary Education, Higher Education, University First Cycle, University Second Cycle, University Postgrade, Technical School First Cycle, Technical School Second Cycle, Professional Formation, Continuous Formation, Vocational Training
Educational Typical Age Range	The age range for the intended users.
Educational Difficulty	Indicate the level of difficulty of this item.
Educational Typical Learning Time	Approximate or typical time it takes to work with the resource.
Educational Description	The comments on how the learning object is to be used.
Educational Language	The natural language of the user.
<b>Rights</b>	
Rights Cost	Whether or not use of the item requires payment.

FIELD	DESCRIPTION
Rights Copyright and Other Restrictions	Whether or not copyright or other restrictions apply.
Rights Description	Comments on the conditions of use of the resource.
<b>Relation</b>	
Relation Kind	The nature of the relationship between the item being described and the one identified by Resource (7.2).
Relation Identifier	The unique identifier of the other item.
Relation Description	The features of the item in relation to other items in the Content System.
Relation Catalog	The source of the following string value.
Relation Entry	The actual value.
<b>Annotation</b>	
Annotation Person	The user who comments upon an item.
Annotation Date	The date comments were made to an item.
Annotation Description	Comments on the educational uses of the item.
<b>Classification</b>	
Classification Purpose	Description of a characteristic of the item by classification entries.
Classification Source	The specific classification.
Classification Taxon	The classification entry for the item; an ordered list of taxons create a taxon path.
Classification ID	The Taxon's identifier in taxonomic system.
Classification Entry	The Taxon's name or label (other than identifier).
Classification Description	A textual description of learning object relative to its stated purpose.
Classification Keyword	The keyword description of learning objective relative to its stated purpose.
Resource Type	The type of resource, such as Exercise, Simulation, Questionnaire, Diagram, Figure, Graph, Index, Slide, Table, Narrative Text, Exam, Experiment, Problem Statement, Self Assessment

## MANAGE DUBLIN CORE METADATA

### Overview

---

The Manage Undefined Metadata: Dublin Core Metadata page allows users to enter attributes that correspond to the Dublin Core Metadata standard. Additional information about the standard can be found at <http://www.dublincore.org>.

### Find this page

---

Follow these steps to open the Manage Dublin Core Metadata page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**. The Metadata menu page appears.
4. Select **Dublin Core Metadata**.

### Fields

---

The Manage Dublin Core Metadata page includes the following fields. All fields on this page are optional.

FIELD	DESCRIPTION
<b>Dublin Core Metadata (Optional)</b>	
<b>Title</b>	Enter a name for the item. This name will not change the file name of the item.
<b>Creator</b>	Enter the person or organization that made the item.
<b>Subject</b>	Enter the subject of the item.
<b>Description</b>	Enter a description of the item.
<b>Publisher</b>	Enter the name of the person or organization that published the item.
<b>Contributor</b>	Enter the names of people who contributed to the item's content.
<b>Date</b>	Enter the date the item was created.
<b>Type</b>	Enter the category or genre for this item.
<b>Format</b>	Enter the media type or size and duration of the item. This may be used to identify the software or hardware needed to use the resource.
<b>Identifier</b>	Enter a unique reference for this item, for example a number it is associated with in an identification system.
<b>Source</b>	Enter the name of the resource from which this item comes.
<b>Language</b>	Enter the language of the item.

<b>FIELD</b>	<b>DESCRIPTION</b>
<b>Relation</b>	Enter a reference to a source that is related to this item.
<b>Coverage</b>	Enter the location and date range of this item.
<b>Rights</b>	Enter Intellectual Property Rights and Copyright information.

## MANAGE CUSTOM METADATA

### Overview

---

The Manage Custom Metadata page allows users to enter custom attributes for an item.

### Find this page

---

Follow these steps to open the Custom Metadata page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Metadata**. The Metadata menu page appears.
4. Select **Custom Metadata**.

### Fields

---

System Administrators may define specific metadata fields for an institution. These fields appear on this page.

## METADATA ATTRIBUTES

### Overview

---

Librarians can customize the types of fields that are presented for users to enter metadata. Existing attributes may be added to metadata templates or the Librarian may create new attributes. New attributes are added to the Manage Attributes page and may be re-used on other Metadata Templates.

### Find this page

---

Follow these steps to find the Manage Attributes page:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.

### Functions

---

The Manage Attributes page includes the following functions:

To...	CLICK...
Add a new attribute	An attribute type from the <a href="#">Add Attribute</a> drop-down list and click Go.
Modify an existing attribute	<a href="#">Modify</a> next to the appropriate attribute
Search for an attribute	The <a href="#">Search</a> icon
Remove an attribute	<a href="#">Remove</a> next to the appropriate attribute (where permitted)
Display more attributes	The navigation links at the bottom of the attribute table Select a number of attributes to display from the Items Per Page drop-down list and click Go

## ADD ATTRIBUTE

### Overview

---

Librarians can create custom metadata attributes by using the Add New Field page.

### Find this page

---

Follow these steps to find the Manage Attributes page:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.
3. Select a type of attribute from the Add Attribute drop-down list and click **Go**. The Add New Field page appears.

### Fields

---

The Add New Field page includes the following fields:

FIELD	REQUIRED?	DESCRIPTION
<b>Field Data</b>		
Value Type	Read only	This field is filled with the type of attribute selected on the Manage Attributes page.
Attribute Name	Yes	The name of the attribute; identify the intended use of this field.
Description	No	The description is displayed in the instructions for the attribute.
<b>Field Usage</b>		
External	No	Librarians can mark attributes as external, meaning that the values are derived from an external source.
<b>Field Availability</b>		
System Availability	No	Librarians can make attributes available or unavailable in the system.

## BATCH ADD ATTRIBUTE OPTIONS

### Overview

---

Librarians and Administrators can create a list offline of options for metadata values in a structured metadata field and then batch upload the list. This allows them to utilize lengthy lists they already have such as a list of subject matters or geographic locations.

### Find this page

---

Follow these steps to find the Add Selection Attribute page:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.
3. Select one of the following options from the Add Attribute drop-down list and click **Go**:
  - Selection Attribute: Short String (100 characters)
  - Selection Attribute: Medium String (255 characters)

The Add Selection Attribute page appears

### Function

---

Follow these steps to add a list of enumerated attributes by batch:

1. Enter a name for this list of attributes in the **Attribute Name** field.
2. Enter a description for this list of attributes in the **Description** field.
3. Check the **External** checkbox if these attributes should be displayed as Read-Only.
4. Determine whether or not these attributes are going to be available to other users in the system by choosing the **Yes** or **No System Availability** radio button.
5. Click **Next**. The Add Options: page appears.
6. Click **Import Options**.
7. Click **Browse** next to the **File Location** field to locate the file to upload.
8. Choose the **Delimiter Type** by clicking one of the following radio buttons: **Comma**, **Tab**, or **Colon**.
9. Click **Submit**. The Add Options: page appears.

## METADATA TEMPLATE CREATION

### Overview

---

Librarians can create custom metadata templates that can be applied to any folder and its contents. Once a template is made available to the folder they are then available to all the content items within that folder. These templates can contain any number of pre-existing metadata attribute fields, as well as new attributes and fields.



**NOTE:** For more information about attributes, see [Metadata Attributes](#).

### Find this page

---

Follow these steps to open the Metadata Templates page.

1. Click the **Metadata Templates** link from the Tools menu.
2. Click **Add Template**. The Add Template page appears.

### How to Add a Template

---

Follow these steps to create a new metadata template.

1. Enter text that appears at the top of the template in the **Page header** field. This is a required field.
2. Enter the name of the template in the **Form Name** field. This is a required field.
3. Enter a description of the template in the **Description** field.
4. Click **Submit**. The Form Design page appears.

## How to Design a Template

---

Once the template has been added, the next step is designing how the template appears. Page instructions, headers and individual fields are added to complete the template.

The Form Design page includes the following design functions:

FUNCTION	DESCRIPTION
Add	Choose a design element and click <b>Go</b> to add that element to the template: <ul style="list-style-type: none"><li>• <b>Instructions.</b> These instructions appear at the top of the page when creating a Metadata Template.</li><li>• <b>Step_Header.</b> A graphical break in a template, which is used for logical grouping of data entry fields.</li><li>• <b>Field.</b> An individual data field.</li></ul>
Remove	Select design elements and click <b>Remove</b> to delete them from the template.
Preview	Click to preview the template in progress. The metadata template is displayed in a new window.
Page Instructions	Click <b>Modify</b> to change the page instructions.
Step header:Details	Click <b>Modify</b> to change the Step Header text.

## ADD INSTRUCTIONS

### Overview

---

These instructions appear at the top of the page of a Metadata Template. They can explain the purpose of the template as a whole. Use step instructions or field-level help text for instructions that only apply to portions of the page. Leave the field blank to have no instructions on the template.

### Find this page

---

Follow these steps to locate this page:

1. Select Instructions from the Add field on the Form Design page.
2. Click **Go**. The Add Instructions page appears.

### How to add instructions

---

Follow these steps to add instructions to the metadata template:

1. Enter the instructions in the **Instructions** virtual text box editor.
2. Click **Submit**. The Form Design page appears with the instructions displayed.

## ADD STEP HEADER

### Overview

---

A step header is a graphical break in a metadata template, which is used for logical grouping of data entry fields. This is useful for applying one set of instructions to several fields at once.

### Find this page

---

Follow these steps to locate this page:

1. Select Step Header from the Add field on the Form Design page.
2. Click **Go**. The Add Step Header Information page appears.

### How to add a step header

---

Follow these steps to add a step header to the metadata template:

1. Enter the header text in the **Step Header** field. This field has a limit of 80 characters.
2. Click **Submit**. The Form Design page appears with the Step Header displayed.

## ADD FIELD

### Overview

---

The individual data fields are where users interact with the metadata template. New fields can be created from this page or copied from existing fields. There are a wide variety of data fields and they can be read-only or interactive.

### Find this page

---

Follow these steps to locate this page:

1. Select **Field** from the **Add** field on the Form Design page.
2. Click **Go**. The **Add Field** page appears.

### How to add a new field

---

Follow these steps to add a new field to the metadata template:

1. Choose Create new field.
2. Choose the **Field Type**.
3. Enter the name of the field in the **Attribute Name** field.
4. Enter a description of the new field in the **Description** field.
5. Check the **External** checkbox to designate the field as Read-Only.
6. Click **Next**. The Format Field page appears.
7. Click **OK** when finished. The Modify Template page appears.

### How to add an existing field

---

Follow these steps to add an existing field to the metadata template:

1. Choose Copy existing field.
2. Click **Browse** next to the **Select attribute** field. A list of attributes appears in a new window.
3. Select one attribute from the list. Use the following functions aid the selection process by limiting the attributes to display:

FUNCTION	DESCRIPTION
<b>Display</b>	
Value Type	Select an attribute type to view from the drop-down list.

FUNCTION	DESCRIPTION
External	Select a Read-Only status: <ul style="list-style-type: none"> <li>• <b>All.</b> View all attributes.</li> <li>• <b>Yes.</b> View Read-Only attributes.</li> <li>• <b>No.</b> View Read/Write attributes.</li> </ul>
And	Select another criteria to view: <ul style="list-style-type: none"> <li>• <b>Name.</b> Search in the Name field.</li> <li>• <b>Description.</b> Search in the Description field.</li> </ul>
Contains/Starts with/Equal to	Choose <b>Contains</b> , <b>Starts with</b> , or <b>Equal to</b> , enter the text to view in the text box and click <b>Go</b> .
<b>Page Navigation</b>	
Number links	Click a number link to display a page of specific attributes.
Next/Previous	Click the Next or Previous link to page through the list of attributes.

4. Click **Submit**. The Add Field page is displayed with the chosen attribute in the Select attribute field.
5. Click **Next**. The Format Field page is displayed.
6. Click **OK** when finished. The Modify Template page appears.

## FORMAT FIELD

### Overview

---

New and existing fields are formatted on this page.

### Find this page

---

Follow these steps to locate this page:

1. Follow the steps to create a new field on the Add Field page.
2. Follow the steps to add an existing field on the Add Field page.

### How to format a new field

---

Follow these steps to format a new field:

1. Enter the instructions for this step in the **Field Label** field.
2. Enter any special formatting needs in the **Help text** field.
3. Click **Submit**. The Form Design page appears with the field information displayed.

### How to format an existing field

---

Follow these steps to format an existing field:

1. Enter the instructions for this step in the Field Label field.
2. Choose whether the field is Read/Write or Read-Only.
3. Check the Required checkbox to make this a required field.
4. Enter any special formatting needs for this field in the Help text field.
5. Click Submit. The Form Design page is displayed with the field information displayed.

## MODIFYING METADATA TEMPLATES

### Overview

---

Librarians can create, remove and customize the fields that are used on metadata templates. These fields can be completely new or added from a list of pre-existing attributes. Existing attributes may be added to metadata templates or the Librarian may create new attributes. New attributes are added to the Manage Attributes page and may be re-used on other Metadata Templates.

### Find this page

---

Follow these steps to find this page:

1. Click Metadata Templates on the Tools menu. The Metadata Templates page appears.
2. Click Modify in the same row as the template to be modified. The Modify Template page appears.

### Functions

---

The Modify Template page contains the following functions:

To...	CLICK...
Modify the Name and Description of this template	<b>Properties.</b> The Properties page appears.
Modify the fields, labels, and organization of this form	<b>Form Design.</b> The Form Design page appears.
Modify the availability of this template	<b>Availability.</b> The Availability page appears.

## MODIFY METADATA TEMPLATE PROPERTIES

### Overview

---

The Metadata Template properties act as metadata for the templates themselves. These properties allow users to access templates, assist in batch operations, and provide description data to the Template Builder.

### Find this Page

---

Follow these steps to open the Properties page for a template:

1. Click **Modify** in the same row as the template to be modified. The Modify Template page appears.
2. Click **Properties**. The Properties page appears.

### Fields

---

The Properties page contains the following fields:

FIELD	REQUIRED?	DESCRIPTION
Page Header	Yes	The page header appears at the top of the form.
Form Name	Yes	The form name appears on pages to allow users access to the form.
Description	No	The description only appears in the Template Builder.

## MODIFY METADATA TEMPLATE AVAILABILITY

### Overview

---

Librarians and other users can control the usage of metadata templates by making them available to a select group of Content System users. Content System items can be grouped in a specific folder and assigned to a specific course. This content can also be shared across a department or an entire institution.

### Find this Page

---

Follow these steps to open the Availability page for a template:

1. Click **Modify** in the same row as the template to be modified. The Modify Template page appears.
2. Click **Availability**. The Availability page appears.

### Fields

---

The Availability page contains the following fields, none of which are required:

FIELD	DESCRIPTION
System Availability	The System Availability radio buttons control the availability of the template throughout the entire system. Choose either Yes or No.
Directory Availability	The Directory Availability radio buttons control the availability of the template at the directory level. The All Directories option makes the template widely available. The Selected Directories and Selected Directories and Sub-Directories options allow the template to be made available to specific directories and sub-directories. Use the Browse button to select these directories and/or sub-directories.

## MODIFY METADATA TEMPLATE FORMS

### Overview

---

The Form Design page is where individual attributes can be added, modified, or removed from the metadata template. Librarians can create, remove and customize the fields that are used to enter metadata for content items.

### Find this Page

---

Follow these steps to open the Form Design page for a template:

1. Click **Modify** in the same row as the template to be modified. The Modify Template page appears.
2. Click **Form Design**. The Form Design page appears.

### Functions

---

The functions available on the Form Design page are as follows:

To...	Do...
Add instructions to the existing metadata template	Select <b>Instructions</b> from the <b>Add</b> drop-down list and click <b>Go</b> .
Add a step header to the existing metadata template	Select <b>Step Header</b> from the <b>Add</b> drop-down list and click <b>Go</b> .
Add individual fields to the existing metadata template	Select either <b>Add New Field</b> or <b>Add Existing Field</b> .
Remove individual fields from the existing metadata template	Click the check boxes next to the fields and click <b>Remove</b> .
Preview the existing metadata template	Click <b>Preview</b> . The metadata template appears in a separate window.

The elements of a metadata template are arranged on the Form Design page as follows:

FORM ELEMENTS	DESCRIPTION
Instructions	The instructions appear at the top of the metadata template page.
Step Header	The step header is a graphical break in a metadata template, which is used for logical grouping of data entry fields.
Individual Fields	The fields that make up the metadata template. These fields can be newly created for the template or they can be imported from a list of Attributes already created and in use on the system.

Clicking the Modify button associated with each of these elements opens a page where modifications can be made to the element.

## Fields

Each element has its own page that contains fields that can be modified. The fields are described as follows:

FIELD	REQUIRED?	DESCRIPTION
<b>Modify Page Instructions</b>		
Instructions	No	Enter the instructions that appear at the top of the metadata template page. Leave the field blank to have no instructions. <b>TIP:</b> Consider using step instructions or field-level help text for instructions that only apply to portions of this metadata template.
<b>Modify Step Header</b>		
Step Header	Yes	Enter text that is displayed in the step header. The step header is a graphical break in a metadata template, which is used for logical grouping of data entry fields.
<b>Modify Field</b>		
Attribute Name	N/A	This is the name of the attribute.
Field Label	Yes	Enter the name of the field that is displayed on the metadata template page.
Field Style	Yes	Choose from the following selection attribute styles: <ul style="list-style-type: none"> <li>• <b>Drop-down</b> produces a drop-down list of values from which only a single choice can be made.</li> <li>• <b>List Menu</b> produces a static list of values from which one or more choices can be made.</li> <li>• <b>Radio Buttons</b> produces a series of buttons from which only a single choice can be made.</li> </ul>
Default Value	No	Choose from a drop-down list of values that are associated with this attribute. This only applies to selection attributes.
Rule Options	No	Choose how the user interacts with this field: <ul style="list-style-type: none"> <li>• <b>Read/Write</b> allows users of this metadata template to enter and modify the value of this field.</li> <li>• <b>Read-Only</b> does not permit users to enter data into this field.</li> <li>• Use the <b>Required</b> check box to make this field required.</li> </ul>
Help Text	No	Enter the user assistance text that appears under this field.

## REMOVE AN ATTRIBUTE

### Overview

---

Librarians can remove custom metadata attributes from the system.

### Function

---

Follow these steps to remove an attribute:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.
3. Click **Remove** next to the attribute to remove.

## MODIFY ATTRIBUTE

### Overview

---

Librarians can modify attributes to suit their needs and the needs of the institution.

### Find this page

---

Follow these steps to find the Modify Attribute page:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.
3. Click **Modify** next to the attribute to modify. The Modify Attribute page appears.

### Fields

---

The Modify Attribute page includes the following fields:

FIELD	REQUIRED?	DESCRIPTION
<b>Field Data</b>		
Field Type	Read Only	This field is filled with the type of attribute selected on the Manage Attributes page.
Attribute Name	Yes	The name of the attribute; identify the intended use of this field.
Description	No	The description is displayed in the instructions for the attribute.
<b>Field Usage</b>		
External	No	Librarians can mark attributes as external, meaning that the values are derived from an external source.
<b>Field Availability</b>		
System Availability	No	Librarians can make attributes available or unavailable in the system.

## SEARCH FOR ATTRIBUTES

### Overview

---

There are many existing attributes in the Content System; searching for a specific attribute can be difficult. The Search function allows a search based on several different parameters, including attribute value, availability, and specific text.

### Find this page

---

Follow these steps to find the Manage Attributes page:

1. Click **Metadata Templates** from the Tools menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.

### Fields

---

The Search function includes the following fields:

FIELD	DESCRIPTION
Available	The availability status. Search for <b>All</b> , <b>Yes</b> , or <b>No</b> .
Value Type	The type of attribute to search for.
External	The Read Only characteristic of the attribute. Search for <b>All</b> , <b>Yes</b> , or <b>No</b> .
And	Use these three fields for text searches: <ul style="list-style-type: none"><li>• Name, ID, Description</li><li>• Contains, Starts with, Equals To</li><li>• Text to search for</li></ul> Click <b>Go</b> to search

## MANAGE VERSIONS

### Overview

---

The Version feature allows users to create different versions of the same file, for example, if multiple people work on the same file and save different copies.



**NOTE:** Versioning must be turned on through the Properties page.

When a file is opened on the Manage Versions page, the file is automatically locked and the user may make changes and save a new copy of the file. The Manage Versions page lists each saved version of the file in a table where each version appears as a row. The table shows the following information about each version, from right to left:

- A checkbox for selecting the version.
- The version number. This appears as a link.
- The date and time the version was created.
- The person who created the version.
- The size of the file.
- An indicator whether the file is locked or unlocked.



**NOTE:** Once a file is opened in the Web Folder, it is automatically locked to other users. Users must use this option to make changes to the file and save them. For more information on mounting Content Collection folders to your operating system for editing please see the topic Web Folders.

### Find this page

---

Follow these steps to open the Manage Versions page.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Versions**. The Manage Versions page appears.
4. Select **Manage Versions**.

Or, simply click the number that appears in the Versions column next to the item in its home folder. This number appears as a link.

## Functions

---

The following functions are available from the Manage Versions page.

To . . .	CLICK . . .
open a file	<b>Web Folder.</b> The location in WebDAV where the file exists will automatically open. Open the file, make edits and save it to create another version. When a file is opened through the Web Folder it automatically locked to other users.
refresh the page	<b>Refresh.</b> The page will be refreshed and any modified information appears.
view a copy of the file	the Version Number link of the copy to view. The item will open in the Web browser; users are unable to make changes or save new versions from this view.
lock a file	<b>Lock.</b> When a file is locked a new version is created and the options <b>Unlock</b> and <b>Rollback</b> appear.
unlock a file	<b>Unlock.</b> The file will be unlocked and the <b>Lock</b> option will appear.
return a file without saving changes	<b>Rollback.</b> This link will only appear if you have the file locked. This will remove the copy you were editing without saving changes. The file will be open to other users to checkout.
delete versions	the checkbox next to each version to delete. Click <b>Remove</b> from the Action Bar. These versions of the files will be erased.

## Using Web Folders in Versioning with Workflows

---

If a user is the recipient of a Workflow, the use of Web Folders in Versioning is dependent on what the user has permissions to. If the Workflow is on a folder, the user has been granted permissions to the folder and Web Folders may be used. If the Workflow is on a file, the user has not been granted permissions to the folder it resides in and Web Folders will not work.

## MANAGE PERMISSIONS FOR AN ITEM

### Overview

---

User access to an item is controlled through the Manage Permissions page. Users can be added individually with separate permissions assigned to each user or users can be added in groups, such as all the users enrolled in a particular course or all the users with a certain institution role. These groupings are derived from the automatically from the *Blackboard Learning System*.

### Find this page

---

Follow these steps to open the Manage Permissions page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Modify Item page appears.
3. Click **Permissions**.

### Permissions

---

Users or groups of users can have none, one, or many of the following permissions. If a group or user does not appear on the list the do not have permission to access the item. Remember that permissions applied to the folder that contains the item can also apply to the item. Please see Manage Permissions for a Folder for more information on the relationship between folder and item permissions.

- **Read:** Ability to view the content item.
- **Write:** Ability to make changes to the item.
- **Remove:** Ability to remove the item.
- **Manage:** Ability to control the properties and settings of the item.

### Functions

---

The Manage Permissions page for an item includes the following functions.

To . . .	CLICK . . .
add a user	<b>Add User</b> in the Action Bar. The <a href="#">Add User</a> page for the item appears. From this page a user or users can be added to the list and permissions set for that user or users.
add a user list	The drop-down list next to the <b>Go</b> button and select a type of user group. Click <b>Go</b> and the appropriate <a href="#">Add User List</a> page appears. From this page a user list can be added and permissions set.
remove a user or a user list	The check box next to the user or user list and then click <b>Remove</b> in the Action Bar. All of the selected users and lists will have their permissions removed. Once permissions are removed, the users may no longer access the item.

To . . .	CLICK . . .
modify the permissions for a group	<b>Modify</b> at the end of the row for the appropriate user or group. The <a href="#">Modify Permissions</a> page appears.

## ADD A USER OR USER LIST TO AN ITEM

### Overview

Adding users or a list of users to an item allows the user or users to access the item according to the permissions set.



**NOTE:** See the Manage Folders Chapter for detailed information about adding permissions for different groups of users to an item, such as a Institution Role User List and All System Accounts.

### Find this page

Follow these steps to open the Add User page or the Add User List page.

Navigate to the folder that contains the item.

1. Click **Modify** in the same row as the item. The Modify Item page appears.
2. Click **Permissions**. The Manage Permissions page appears.
3. Click **Add User** from the Action Bar to add selected users.

OR

Select a type of user list from the drop-down list in the Action Bar and click Go to add a group of users.

### Fields

The Add User page and the Add User List page include the following fields:

FIELD	DESCRIPTION
<b>Choose Users [r]</b>	<p>There are different tools for selecting users depending on the group selected. With a course group, both the courses and the specific roles in the course can be defined to create separate permissions. For example, when assigning permissions to the /courses/history/documents/important_file item, all the students in every history course can be chosen and thus would share the same permissions.</p> <p>When adding a user or users, individual users can be added by entering each user's Username or by using the search function.</p>
<b>Set Permissions</b>	
<b>Permissions</b>	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, please see Manage Permissions for an Item.

## Permissions in copied courses

---

Instructors may add links to Content Collection items to their course Content Areas. When a course is copied, all content, including these links is copied into the destination course. Users who are enrolled in the original course and the destination course will be able to view Content Collection items that are linked to in the destination course.

The Administrator may enable an option to automatically update permissions to Content Collection items after a course copy. If this option is enabled, users in the new course will also have permission to view the Content Collection items linked to in the course. If this option is not enabled, users who were not enrolled in the original course will not be able to view these items in the destination course. The Instructor must manually change the permissions of the items to include this new course list. To do this, the Instructor must locate the items in the Content Collection and grant permission to the Course User List.



**NOTE:** The same principal is true for courses that are archived and restored. When a course is restored, the Instructor must grant permissions for the users enrolled in the restored course.

## MODIFY ITEM PERMISSIONS

### Overview

---

Modifying item permissions changes the permissions for a user or group of users. For detailed information on permissions please see [Manage Permissions for an Item](#).

### Find this page

---

Follow these steps to open the Modify Permissions page.

1. Navigate to the folder that contains the item.
2. Click **Modify** in the same row as the item. The Modify Item page appears.
3. Click **Permissions**. The Manage Permissions page appears.
4. Click **Modify** next to the User or User List to be modified.

### Fields

---

The following fields appear on the Modify Permissions page.

FIELD	DESCRIPTION
<b>Modify Permissions</b>	
	Displays the user or group that will be modified.
<b>Set Permissions</b>	
Permissions	Check each box for the permissions that will be applied to the user or users. For a full description of each permission, please see <a href="#">Manage Permissions for an Item</a> .

### Permissions Warning

---

Modifying permissions may impact users who access an item through a course or Portfolio. For example, if an item is linked to in a Portfolio and Read permission is removed for the Portfolio User List, a broken link appears when users attempt to access the item through the Portfolio.

When a user modifies the permissions on an item that is shared with a Portfolio or course, a warning appears indicating that this action will break existing links to the item. The user can cancel the action or choose to continue.

## TRACKING

### Overview

---

The Tracking feature records every instance that a user interacts with the item. Tracking is useful for things like verifying that someone has read a required assignment or seeing who last made changes to a file.



**NOTE:** Tracking must be turned on through the Enable/Disable Tracking page.

The Tracking page includes a table that lists each file access as a row. Each row includes the following information, from left to right:

- The name of the user that accessed the file.
- The interaction with the accessed file.
- The version of the file accessed.
- The date the file was accessed.
- The IP address of the computer that the used to access the file.

### Find this page

---

Follow these steps to open the Tracking page.

1. Navigate to the folder that contains the item.
2. Click **Modify** in the same row as the item. The Modify Item page appears.
3. Click **Tracking**. The Tracking page appears.

### Functions

---

The following functions may be performed on the Tracking page.

To . . .	CLICK . . .
add the latest access information	<b>Refresh.</b> Any recent actions that do not yet appear on the page will appear.
remove access information	<b>Remove Log</b> in the Action Bar. All of the actions listed on the Tracking page will be removed. New actions will still be tracked.

### Tracking multiple operations

---

If a single user completes the same operation on a file multiple times, the Tracking log will only record the first operation. For example, if a user opens and reads the same document multiple times, only the first operation will be recorded. If the user clears the cache and reads the file again, a second operation appears in the Tracking log.

### WebDAV clients

---

Some WebDAV clients, for example Goliath, may perform multiple operations when used with the Content Collection. For example, when a file is read, a Read operation may appear twice in the Tracking log, even though the user has only read the file once.

## COMMENTS

### Overview

---

Comments store text from users. Comments are useful for storing opinions or instructions regarding the contents of an item. The setting for controlling whether or not users can add comments to an item appears on the Set Private/Shared Comments page.

### Find this page

---

Follow these steps to open the Comments page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Manage Item page appears.
3. Click **Comments**. The Comments page appears.

### Functions

---

The following functions are available on the Comments page.

To . . .	CLICK . . .
post a comment	<b>Add Comment</b> from the Action Bar. A text box appears. Enter a comment and click <b>Submit</b> .
remove a comment	the checkbox next to the comments to remove then select <b>Remove</b> .
sort comments	the carat above a column to sort comments by that column.

## ADD CATALOG ENTRY

### Overview

---

Users may submit items to the Learning Objects Catalog from the Add Catalog Entry page. After an entry is submitted it appears on the Manage Catalog page. A Catalog Manager must approve the entry before it appears in the Learning Objects Catalog.

See the [Learning Objects Catalog](#) chapter for more information.

### Find this page

---

Follow these steps to open the Add Catalog Entry page for an item.

1. Navigate to the folder that contains the item to be modified.
2. Click **Modify** in the same row as the item to be modified. The Manage Item page appears.
3. Click **Comments**. The Comments page appears.
4. Select **Manage Catalog Entries**. The Manage Catalog Entries page appears.
5. Select **Add Entry**.



**NOTE:** The Add Entry option is only available if categories have been added to the Learning Objects Catalog.

### Fields

---

The Add Catalog Entry page includes the following fields:



**NOTE:** The information in the Description section is pulled from the General Metadata. Information modified on this page, will only be used for this Catalog Entry. The General Metadata for the item will remain unchanged. This allows the user to enter different information for separate Catalog Entries. If a Content Collection item is added to the catalog multiple times, each entry may have different information.

FIELD	DESCRIPTION
<b>Category</b>	
<b>Category Name</b>	Use the drop-down list to select the appropriate category for this entry.
<b>Description</b>	
<b>Display Name</b>	Enter a title for this catalog entry.
<b>Authors</b>	The name of the user who created this item appears.
<b>Description</b>	Enter a description for the entry or leave the default.

FIELD	DESCRIPTION
<b>Keywords</b>	Enter keywords for the entry or leave the default.
<b>Learning Objectives</b>	Enter Learning Objectives for the entry or leave the default.
<b>Catalog Availability</b>	
<b>Submit to Catalog</b>	If an item is submitted to the Internal Catalog, all users with a System Account will be granted Read permission to the item and the catalog entry appears to all users on the system. If this option is not selected, only users who are granted Read permission to the item will view this entry in the catalog.

## CHAPTER 8-PASSES

### MANAGE PASSES

#### Overview

---

Passes are a means of sharing an item or folder with a user who does not have access to the Content Collection. A person who receives a pass must have:

- An email account
- Access to the Internet
- An application capable of opening the item, for example, Microsoft Word to open a Microsoft Word document.

Passes are a safe way to collaborate on projects with others outside the school on projects because access is specific and controlled.

- Passes are listed in a table on the Manage Passes page. Each row, representing one pass, contains, from left to right:
- A checkbox for selecting the pass
- The date and time the pass expires
- The Read permissions and Write permissions assigned to the pass. A checkmark means that the privilege is assigned to the pass.
- The URL that will allow those outside the Content Collection to access the pass.

Sending a pass for a folder grants access to all subfolders and files within the folder where the pass was created. Pass recipients with Read access have the ability to view subfolders and files. Pass recipients with Read/Write access have the ability to add and modify folders and files.

#### Find this page

---

Follow these steps to open the Passes page.

1. Navigate to the folder that contains the item or folder.
2. Click **Modify** in the same row as the item or folder.
3. Click **Passes**. The Passes page appears.

#### Functions

---

The following functions are available from the Manage Passes page.

To . . .	CLICK . . .
create a new pass	<b>Add Pass</b> in the Action Bar. The <a href="#">Add Pass</a> page appears.
share a pass with an outside user	the checkbox for a pass in the table then click <b>Email</b> in the Action Bar. The <a href="#">Email Pass</a> page appears.
remove a pass	the checkbox for a pass or passes in the table then click <b>Remove</b> to delete the passes.

## ADD PASS

### Overview

---

Passes are created from the Add Pass page. A pass creates a URL that can be used to access a file or folder by outside users. Passes can be restricted by setting an expiration time or date. It is also possible to manage pass privileges so that external users (users who do not have access to the Blackboard system) can collaborate on work or simply view an item or folder without changing it.

If comments for the item or folder are shared, the user with the pass may read comments and add new comments. If a user outside the system adds a new comment, the name associated with the comment is 'Anonymous'.



**NOTE:** The lifetime for passes is calculated not by the calendar but by increments of 31 days for a month and 365 days for a year. For example, a one month pass will always expire 31 days later and a one year pass will always expire 365 days later.

### Find this page

---

Follow these steps to open the Add Pass page.

1. Navigate to the folder that contains the item or folder.
2. Click **Modify** in the same row as the item or folder.
3. Click **Passes**. The Manage Passes page appears.
4. Click **Add Pass** in the Action Bar. The Add Pass page appears.

### Fields

---

The Add Pass page includes the following fields.

FIELD	DESCRIPTION
<b>Expiration</b>	
<b>No Expiration</b>	Select this option to set an unlimited time for the pass.
<b>Expires in</b>	Select a span of time for the pass. Access to the file will expire according to the selection. The countdown of the time until expiration begins when the pass is created.
<b>Select Permissions</b>	
<b>Permissions</b>	Select the permissions associated with the pass. Choose Read to only allow pass users to view the content. Choose Read/Write to allow pass users to change the file, metadata, or properties. Users with Read or Read/Write permissions may access shared comments.



**NOTE:** A pass set to have no expiration is technically set to expire on January 1, 2038. Users are unable to specify a lifetime that extends past this date.

## EMAIL PASSES

### Overview

---

Once a pass has been created it may be shared with outside users through the Email Pass page. The Email Pass page sends an Email message to outside users with the URL pass for accessing the Content Collection item or folder.

If the user is granted Read and Write permissions to the item, the URL pass is linked to a file information page. The user may access the file from this page, or they may access additional information such as shared comments and versions.

If the user is granted Read only permissions to the item, there are two options for linking the URL pass. The URL pass may be linked directly to the file or be linked to the file information page. The file information page provides access to the item and to any shared comments.

### Find this page

---

Follow these steps to open the Email Passes page.

1. Navigate to the folder that contains the item or folder.
2. Click **Modify** in the same row as the item or folder.
3. Click **Passes**. The Manage Passes page appears.
4. Select a pass by clicking the checkbox next to it.
5. Click **Email Passes** in the Action Bar.

### Fields

---

The Email Passes page includes the following fields.

FIELD	DESCRIPTION
<b>Message Details</b>	
<b>To [r]</b>	Enter the email addresses of all the people who will receive the pass.
<b>Cc</b>	Separate email addresses that appear in the same field with commas. The Cc: field is useful for alerting someone who is not the main recipient. The
<b>Bcc</b>	Bcc: field prevents other recipients from seeing the email addresses in this field.
<b>From</b>	Displays the name of the person sending the pass.
<b>Subject [r]</b>	The default subject is "Your Name has sent You a Pass." This may be edited.
<b>Message</b>	A default message appears in this field. Edit the message as you like but be careful not to delete or change the URL. If you edit or delete the URL, users will not be able to access the pass.
<b>URL Link options</b>	

FIELD	DESCRIPTION
<b>URL Link options</b>	This option only appears if one or more Read only passes were selected to email. Select this option to link the URL pass to the file information page. The file information page includes information about the item and access to shared comments. If this option is not selected, the URL provides a direct link to the file or folder.

## CHAPTER 9-PORTFOLIOS

### ABOUT PORTFOLIOS

#### Overview

---

Portfolios are an invaluable tool in academic and professional development, providing a powerful medium for users to efficiently collect and organize artifacts representative of work completed over time. Portfolios offer a means to demonstrate formative and/or summative progress and achievement. Portfolio authors are empowered with tools to effectively present their information in a cohesive, personalized format.

#### Portfolio Types

---

There are three types of portfolios available in the system:

**Personal Portfolios:** Personal Portfolios feature more robust tools for authors to give them greater flexibility for personalizing a Portfolio's style. Users are able to customize colors, fonts, background images and overall content layout beyond the classic frame-based presentation available with Basic Portfolios. With Personal Portfolios, authors collect one or many independent entities called Personal Artifacts which comprise the actual content presented in the Portfolio. Within the Portfolio, Artifacts are organized through placement on Portfolio Pages. Artifacts can be created as part of or independent of the Portfolio authoring process. Authored Artifacts can be reused in other Portfolios.

Administrators have the ability to define whole Portfolio templates that govern settings that apply to the entire authored Portfolio. Templates can control all aspects of the Portfolio style and overall layout; template designers have the flexibility to define whether certain template settings are restricted (and cannot be altered).

**Outcomes Portfolios:** Outcomes Portfolios and Personal Portfolios function similarly. Outcomes Portfolios are integrated with the Blackboard Outcomes System and can be used with that system to form a standardized workflow for the review of Portfolios. Outcomes Portfolios are always generated from a template to ensure consistency across each Portfolio. Outcomes Portfolios are only available with the Blackboard Outcomes System. For more information, please see the Blackboard Outcomes System Reference Manual.

**Basic Portfolios:** Basic Portfolios serve as a simple tool for quickly creating Portfolios. Basic Portfolios have a simpler design and do not use Artifacts, so it is more difficult to reuse content between portfolios. Administrators may turn off Basic Portfolios. Basic Portfolio features and functions are covered in a separate chapter.

#### My Portfolios

---

The My Portfolios page is the launching point for viewing, creating, and reviewing Portfolios. The My Portfolios page is accessible from the left-hand navigation controls within the Content Collection tab or from the My Portfolios portal module which may appear on other tabs.

The My Portfolios page includes a search function to locate a specific portfolio. The list of portfolios includes information on the Portfolio Type, its availability, and links to read comments and manage the portfolio settings.

To view a portfolio from the My Portfolios page, click on the Portfolio name.

## CREATE A PERSONAL PORTFOLIO

### Overview

---

A Personal Portfolio can be a few simple pages displaying one or two pieces of content or a comprehensive record of achievement and performance over time. When creating a portfolio, it is important to understand that the portfolio is made up of pages that may include one or many artifacts.

### Step 1: Plan!

---

Always start a Personal Portfolio project by plotting the goal of the Portfolio and thinking about the design and content of the Portfolio. While it is easy to make changes to a Portfolio over time, taking some time to plan the portfolio will save time and energy throughout the process.

### Step 2: Add a Personal Portfolio

---

Follow these steps to add a Personal Portfolio.

1. Click **My Portfolios**.
2. Click **Add Personal Portfolios**.
3. Select a template to apply or create a new Personal Portfolio not based on a template.
4. Enter a **Title** and **Description** for the Portfolio.
5. Set the **Availability Options** for the Portfolio and click **Submit**.

### Step 3: Design the Appearance of the Portfolio

---

In most cases, Personal Portfolios created from a template already have a defined appearance and it is not necessary to modify that appearance. In fact, for many templates, some or all of the Portfolio Style options will be locked.

The Portfolio Style Options allow users to:

**Select a layout:** The layout determines the position of the navigation menu.

**Define a header and footer:** Headers and footers can be designed to incorporate images and text. The interface for entering headers and footers is the Visual Text Box Editor.

**Select a background color and watermark image:** Apply a color and an image to the background of the portfolio.

**Select fonts for text as well as page titles and page section titles:** Choose fonts for various text elements in the portfolio.

**Design the Navigation Menu:** Configure the appearance of navigation items within the menu. The menu may use buttons or text links to provide access to Portfolio Pages.

Follow these steps to configure the appearance of the portfolio.

1. Click **My Portfolios**.
2. Click **Modify** for a Personal Portfolio from the list.
3. Click **Portfolio Style**.
4. Set the Portfolio Style elements and click **Submit**.

#### Step 4: Add Pages and Artifacts to the Portfolio

---

Personal Portfolios consist of Pages that hold Artifacts. Artifacts are links, files, text, and similar items. Typically Artifacts are reflective of academic performance and tell a story that depicts progress over time. When building a Portfolio from a template, the Pages may already be created. Also, it may not be possible for the user to add or remove pages.

Follow these steps to add a Page to a Portfolio and add Artifacts to a Page.

1. Click **My Portfolios**.
2. Click **Modify** for a Personal Portfolio from the list.
3. Click **Manage Content**.
4. Click **Add Page**. Or, to modify a Page and add more Artifacts to the page, click **Modify** for a page from the list.
5. Enter a name and description for the Page.
6. Add Artifacts to the Page Contents. Click **Browse** to search for an existing Artifact. Click **Add New Artifact Form** to create an Artifact and add it to the Page.
7. Click **Submit**.

## ARTIFACTS

### Overview

---

Artifacts are content that are used to demonstrate academic performance. Artifacts can consist of the following:

- **Text and Images:** Text and images can be directly entered as an Artifact or used to introduce or support an attached file or a link to a Content Collection item. Text and Images are entered using the Visual Text Box Editor, so users can enter text, formulas, images, links, and multimedia files.
- **Content Collection Item:** Artifacts can link to an item in the Blackboard Content System.
- **Attached File:** Artifacts can include files uploaded from the user's local machine.

Artifacts are added to Pages in Personal Portfolios and can be reused across many Portfolios.

### Create an Artifact

---

Follow these steps to create an Artifact.

1. Click **Personal Artifacts** from the Portfolios area.
2. Click **Add Personal Artifact**.
3. Enter a name and description for the Artifact. The description appears in the list of Artifacts to help identify the Artifact but the description will not display when the Artifact is used in a Portfolio.
4. Define the Artifact content using the Visual Text Box Editor and the options for uploading files or linking to Content Collection items.
5. Click **Submit**.

## MANAGE PERSONAL PORTFOLIO

### Overview

---

Users can manage the sharing, downloading, and comments for a Personal Portfolio from the Modify Portfolio page. They may also access the Properties page to modify the name, style or availability of the Personal Portfolio.

### Find this page

---

Follow the steps below to open the menu page with options for managing a Personal Portfolio.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.

### Comments

---

The Personal Portfolio Comments page includes columns displaying the date posted, the person who posted the comment, and the comment itself. Comments can be sorted by clicking the carat at the top of each column. For example, to sort comments by date, click the carat at the top of the Date Posted column.

Follow these steps to open the Comments page.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Click **Manage Comments**.

Comments are viewed, added, and removed from this page. Only the comment author or the owner of the Personal Portfolio may remove a comment.

### Portfolio to Go

---

Any Personal Portfolio and its contents may be downloaded as a compressed zip file from the Manage Personal Portfolio page. The zip file contains the HTML pages and Artifacts that make up the entire Personal Portfolio. This tool is useful for allowing users to archive older Personal Portfolios onto a personal computer, or for moving a Portfolio.

Follow the steps below to download a Personal Portfolio.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Select **Portfolio to Go**.
4. After **Portfolio to Go** is selected on the Manage Personal Portfolio page, the Download Portfolio page appears.
5. Select the **Click to download Portfolio** link. A window appears with options to open or save the Personal Portfolio.
6. Select **Save**, and save the Personal Portfolio to the desired location.

To view the Personal Portfolio, unzip the downloaded file to a local folder then click on "index.html" to open the Personal Portfolio. Note that if buttons are used for navigation the buttons will be replaced with text links.

## SHARE A PERSONAL PORTFOLIO

### Overview

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A Personal Portfolio is private until the person who created it decides to share it with other users. The Personal Portfolio can be shared with individual users or all the users in a course or an organization. In addition, the Personal Portfolio can be shared with anyone who has an email address and access to the Internet.

The following list explains scenarios for sharing a Personal Portfolio:

- **Share a Personal Portfolio with another Blackboard user** - the Personal Portfolio is listed in the user's Received Personal Portfolios for easy access.
- **Share a Personal Portfolio with an external user** - a URL is created for access to the Personal Portfolio. This may be emailed to the user from the Content Collection.
- **Share a Personal Portfolio with a course or organization** - the Personal Portfolio is listed in the Personal Portfolios tool in the course, and course or organization users may search for the Personal Portfolio in Personal Portfolio Search.
- **Share a Personal Portfolio with an institution role** - all users with that role may search for the Personal Portfolio in Personal Portfolio Search.
- **Share a Personal Portfolio with All System Accounts** - any user on the system may search for the Personal Portfolio in Personal Portfolio Search.

### Portfolio Search

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All users with whom a Personal Portfolio is shared have the ability to find it using Portfolio Search. Portfolio Search allows users to search all Portfolios that they have access to by username (the Portfolio owner), Portfolio title, Portfolio description, and Portfolio Learning Objectives. These fields are available from the Manage Properties page of every Portfolio. Adding descriptive content to these fields will improve the results of Personal Portfolio Search.



**NOTE:** When a Portfolio is shared with a user, the user must refresh his or her browser before the Portfolio appears in **Received Portfolios**. If permissions are removed for the user, the Personal Portfolio will continue to appear in the user's **Received Portfolios** until they refresh the browser.

### Share with a Course or an Organization

---

A Personal Portfolio is shared with a course or an organization through the Share with Courses page or the Share with Organization page.



**NOTE:** Course Personal Portfolios may be enabled or disabled by the Instructor through Manage Tools on the Control Panel. If Course Personal Portfolios are available, Students may access them through Tools on the Course Menu.

Follow these steps to open the Share with Courses or Share with Organizations page.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Click **Share Personal Portfolio**.
4. Select **Share with Course** or **Share with Organization** from the drop-down list in the Action Bar.
5. Enter the Course ID or Organization ID that will be granted access at this time. Separate each ID by a comma. The Personal Portfolio can be shared with more courses or organizations at any time by returning to this page, privileges for all courses or organizations that should be allowed to view the Personal Portfolio do not need to be granted at the same time. The **Browse** function can be used to locate courses or organizations if the Course ID or Organization ID is not known.

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### Share with Institution Roles

A Personal Portfolio is shared with users who have specific institution roles through the Share with Institution Roles page.

Follow these steps to open the Share with Institution Roles page.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Click **Share Personal Portfolio**.
4. Select **Share with Institution Roles** from the drop-down list in the Action Bar.
5. All roles available in the system appear in the multi-select box. This Personal Portfolio is available to users with roles that appear in the **Selected Roles** box. Select which roles have access to this Personal Portfolio in the **Available Roles** box. Use the arrows to move these roles to the **Selected Roles** box.

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### Share with all system accounts

A Personal Portfolio is shared with all users who have an account on the *Blackboard Learning System* Share with the All System Accounts page.

Follow these steps to share a Personal Portfolio with all system accounts.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Click **Share Personal Portfolio**.
4. Select **Send to All System Accounts** from the drop-down list in the Action Bar.
5. Select **Submit** to share this Personal Portfolio with all users who have an account on the system.

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### Share with system users

Other users in the system can view a Personal Portfolio only if the Personal Portfolio creator shares it with them. Other users are granted access to a Personal Portfolio through the Send to User page.

Follow these steps to open the Share with User page.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.

3. Click **Share Personal Portfolio**.
4. Click **Share with User** from the Action Bar.
5. Complete the Share with User page according to the table below.

FIELD	DESCRIPTION
<b>Choose Users</b>	
<b>Usernames [r]</b>	Enter the username for each user that will be granted access at this time. Separate each username by a comma. The Personal Portfolio can be shared with more users at any time by returning to this page, privileges for all users that should be allowed to view the Personal Portfolio do not need to be granted at the same time.  The <b>Browse</b> function can be used to locate users if the username is not known.
<b>Email Information</b>	
<b>Send email?</b>	Select this option to send an automatically generated email to each user. The message will inform the users that they may access the Personal Portfolio.
<b>Subject</b>	Edit the subject for the email.
<b>Message</b>	Edit the body of the message inviting others to view your Personal Portfolio.
<b>Send copy of message to self?</b>	Select this option to send a copy of the email to the email account included as part of your <i>Blackboard Learning System</i> profile.
<b>Use blind carbon copy (Bcc:)</b>	Select this option to use the BCC: function. BCC: will hide the identity of those receiving the email from others receiving the same email. You, as the sender, will appear as the primary recipient of the message.

### Share with External Users

A Personal Portfolio can be shared with anyone with an email account and access to the Internet. Sharing a Personal Portfolio is an effective method for displaying your work to colleagues at other schools or even potential employers. Access to a Personal Portfolio can be restricted by setting an expiration time or date. Verify that each email address is entered correctly.



**NOTE:** The lifetime for Personal Portfolio shares are calculated not by the calendar but by increments of 31 days for a month and 365 days for a year. For example, a one month share will always expire 31 days later and a one year share will always expire 365 days later.

## Find this page

Follow these steps to share a Personal Portfolio with external users.

1. Click **My Portfolios** under Personal Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Personal Portfolios.
3. Click **Share Personal Portfolio**.
4. Click **Share with External Users** in the Action Bar.
5. Fill out the form using the table below as a guide.

FIELD	DESCRIPTION
<b>Choose Users</b>	
<b>To</b> [r]	Enter the email address of each person outside of the system that will receive access to the Personal Portfolio. Separate each email address with a comma. If your Personal Portfolio contains sensitive information, please verify that each email address is entered correctly.
<b>Email Information</b>	
<b>Subject</b> [r]	Edit the Subject line of the message. The default subject line is, "<username> has sent you a Personal Portfolio Invitation."
<b>Message</b>	Edit the body of the message inviting others to view your Personal Portfolio.  The default message includes the line <PERSONAL PORTFOLIO_URL>. Do not delete this line! It will be replaced with the URL pointing to the Personal Portfolio. Without this URL, outside users cannot view the Personal Portfolio.
<b>Send copy of message to self?</b>	Select this option to send a copy of the email to the email account included as part of your <i>Blackboard Learning System</i> profile.
<b>Use blind carbon copy (Bcc:)</b>	Select this option to use the BCC: function. BCC: will hide the identity of those receiving the email from others receiving the same email. You, as the sender, will appear as the primary recipient of the message.
<b>Personal Portfolio Password</b>	
<b>Use password?</b>	Select this option to protect the Personal Portfolio with a password. If this option is selected, enter the password in the text field.
<b>Include password in email?</b>	This option only appears if the <b>Use Password</b> option was selected. Select this option to include the password in the email message to outside users. If the password is not included in the email it must be transmitted in some other way before the Personal Portfolio can be viewed.
<b>Expiration</b>	
<b>No Expiration</b>	Select this option to set an unlimited time for the Personal Portfolio share.

FIELD	DESCRIPTION
<b>Expires in</b>	Select a span of time for the Personal Portfolio share. Access to the Personal Portfolio will expire according to the selection. The countdown of the time until expiration begins when the Personal Portfolio share is created.

## REVIEW PORTFOLIOS

### Overview

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Portfolios drafted by other users can be shared with other users to solicit feedback to help improve the Portfolio. Portfolios for review are found on the Received Portfolio page.

### Review a Portfolio

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Click on the link for a Portfolio on the Received Portfolios page to view the Portfolio and add any comments.

### Organize Received Portfolios

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Received Portfolios can be organized into folders. This is especially useful for teachers that are grading Portfolios and wish to organize Received Portfolios into courses or sections.

## CHAPTER 10—BASIC PORTFOLIOS

### BASIC PORTFOLIOS OVERVIEW

#### Overview

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Basic Portfolios are collections of content organized into customized Web pages. They provide a means of presenting a collection of work, and sharing that collection with others. Basic Portfolios are used for many purposes in learning and assessment such as displaying achievements and progress, showcasing experiences and collections of work, or collecting self-reflection. Electronic Basic Portfolios (e-Basic Portfolios) make it easy to share the presentation, and to receive feedback from friends, coworkers, educators, and peers. The Content Collection provides a seamless way of linking Basic Portfolios to content stored in the system.

The Content Collection Basic Portfolio tool allows users to include existing Content Collection content (items and/or folders), external links, free-form items, and template-based items. These Basic Portfolios can be private, shared within the system, and shared to external users.

Additional information about Basic Portfolios may be found at

ePortConsortium (<http://www.eportconsortium.org>)

American Association of Higher Education ([http://webcenter1.aahe.org/electronicBasic Portfolios](http://webcenter1.aahe.org/electronicBasic%20Portfolios))

#### Basic Portfolio Management

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Using the links in the My Portfolios area of the left side navigation panel, users can create, manage, and share Basic Portfolios.

**Basic Portfolio Creation** – When this option is selected the [Basic Portfolio Wizard](#) will automatically launch. Users may create and save a Basic Portfolio.

**My Portfolios** – This area enables users to view, add, and manage Basic Portfolios.

**Received Basic Portfolios** – All Basic Portfolios that have been shared with the user will appear in this area.

#### Types of Basic Portfolio Content

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Basic Portfolios may include three types of documents: content stored in the Content Collection, links to external URLs, and items based on Basic Portfolio templates.

TYPE	DESCRIPTION
Content Items	<p>Link to content stored in the Content Collection. Any item (file or folder) that a user has Manage permission on in the Content Collection may be added to a Basic Portfolio, making it easy to showcase accomplishments.</p> <p>When a Content Collection item is included in a Basic Portfolio, a Basic Portfolio User List is added to the Manage Permissions page for that item and granted Read permission. Users who the Basic Portfolio is shared with will be added to the Basic Portfolio User List.</p> <p>If an item that is linked to in a Basic Portfolio, is modified in the Content Collection, changes are visible in the Basic Portfolio, and there is no need to recreate the link.</p>

TYPE	DESCRIPTION
Links	<p>Links to external URLs may also be added to Basic Portfolios, such as <a href="http://www.myschool.edu">http://www.myschool.edu</a>. It is important to verify that the URL remains active when sharing a Basic Portfolio.</p> <p>It is good practice to not link to Web sites that have advertisements or other pop-ups associated with the pages. Doing so will disrupt the flow of the Basic Portfolio.</p>
Items	<p>Items may be created for a Basic Portfolio from a blank page, or from a template if the System Administrator has provided them. The Content Collection comes with 33 templates for pages such as Resumes, References, Certifications, Lesson Plans, and more. Additionally, institutions may create templates and add them to the list.</p> <p>Once a template is added to a Basic Portfolio, the template may be modified, and links to Content Collection content items can be added to the page. For example, if the Lesson Plan template is added, each topic discussed in the lesson plan may link to documents stored in the Content Collection. Items are a great way to group content links and give context to work.</p>
Content Items	Link to content stored in the Content Collection.

### Plan Basic Portfolio Content

Before creating a Basic Portfolio, it is a good idea to plan what content will be included, how it will be stored, and how it will be presented. There are two ways to start building a Basic Portfolio: Add Basic Portfolio and the Basic Portfolio Creation Wizard

Add Basic Portfolio sets the properties of a Basic Portfolio including its name, description, design, availability, and comments. Once the properties are set, content may be added from the Contents page.

The Basic Portfolio Creation Wizard groups these steps, creating a shell ready for customizing. The Wizard builds the properties, and then allows for linking to content items, links, and blank or template pages. After the shell of the Basic Portfolio is created, the pages may be modified and customized from the Contents page.



**TIP:** Determine how the viewer should read the contents when linking to an item in the Content Collection. If you use Add Content, the item will open immediately. However, if you use Add Item, and put a link to a Content Collection item in a blank or template page using links, then the HTML page will open and from the main Basic Portfolio page – this gives users a smoother transition from page to page, and the Basic Portfolio can introduce the document before opening it.

### Plan for stored content

If the Basic Portfolio will include documents stored in the Content Collection, review the documents beforehand:

- Check for editorial changes needed.
- If Versioning is enabled, check which version of the document would be best to link to.

The storage location of Content Collection items should be planned in advance. After the Basic Portfolio is created, the location of the file should not change. Changing the location of the file may result in broken links and issues with permissions.



**TIP:** Consider creating a folder in My Content for documents included in the Basic Portfolio. This will ensure that the files remain in the same location. If the Basic Portfolio will include a link to a file that you do not have control of (such as group project files stored in another user's My Content area), consider copying the file to a controlled location

### Consider the audience

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Before finalizing a Basic Portfolio, consider the intended audience. There are a number of design options that allow for a customized look and feel. Consider the purpose the Basic Portfolio represents – should the Basic Portfolio appear professional, creative, fun, or exciting? Attention to the types of images and the choice of colors in the design will provide the mood.



**TIP:** A good web practice is to consider using four or less colors for the design. This allows for maximum variation while not making the page too busy, distracting viewers from the content.

Finally, consider the content for each user viewing the Basic Portfolio. If the purpose of the Basic Portfolio is slightly different for sharing with one user than another, consider creating two similar Basic Portfolios, using the Basic Portfolio Copy tool to save time.

### Availability

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It is good practice to only make a Basic Portfolio available when it is ready to be viewed. When creating the initial shell of the Basic Portfolio, design and content may not be complete. Set the Basic Portfolio to **Unavailable** until the Basic Portfolio is complete, then modify the properties and set the Basic Portfolio to **Available** when it is final.

### Comments

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Basic Portfolio comments may be **Private** or **Shared**. Private comments are only viewed by the Basic Portfolio owner and the user posting the comment. If comments are shared, all users viewing the Basic Portfolio may read the comments. Comments are helpful for gathering feedback on the Basic Portfolio or its content.

The status of comments may be changed at any time. For example, if comments are gathered during a review, it may be helpful for all reviewers to see the comments. However, when the Basic Portfolio is complete, those comments may be made private so that the Basic Portfolio viewers do not see the review process.

## BASIC PORTFOLIO WIZARD

### Overview

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The Basic Portfolio Wizard is the quickest and easiest method for creating a new Basic Portfolio. The wizard is completed in eight steps that do everything from name the Basic Portfolio and define the color scheme to add content items and URLs to the Basic Portfolio. The contents and settings for a Basic Portfolio may be modified after the Wizard is completed.

### Start the wizard

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Click **Basic Portfolio Creation** under Basic Portfolios on the Content Collection menu to open the Basic Portfolio Wizard. Or follow these steps:

1. Under the heading Portfolios, click **My Portfolios**.
2. Click **Basic Portfolio Creation Wizard** from the Action Bar.

### Wizard fields

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The table below outlines the options available when creating a Basic Portfolio through the Basic Portfolio wizard.

FIELD	DESCRIPTION
<b>Wizard Start</b>	
The first page of the wizard displays information on creating a Basic Portfolio including how to navigate the wizard. A navigation bar appears at the bottom of each wizard page with the following buttons:	
<b>Cancel:</b> Click to erase and end the Basic Portfolio, this will erase all information entered into the Basic Portfolio Wizard.	
<b>Back:</b> Click to navigate to the previous page. This button does not appear on the first page of the wizard.	
<b>Next:</b> Click to navigate to the next page. This button does not appear on the last page of the wizard.	
<b>Finish:</b> Click this button to complete the wizard and create the Basic Portfolio. This button replaces the <b>Next</b> button on the last page.	
If the Basic Portfolio Wizard window is closed without first selecting <b>Cancel</b> , a partial Basic Portfolio will be created. The User may remove this partial Basic Portfolio.	
<b>Step 1: Basic Portfolio Information</b>	
<b>Title [r]</b>	Enter a title for the Basic Portfolio. This name will identify the Basic Portfolio in the My Basic Portfolio folder.
<b>Description</b>	Enter a description for the Basic Portfolio.
<b>Step 2: Basic Portfolio Design</b>	

FIELD	DESCRIPTION
<b>Menu Style</b>	Select how to display the items in the Basic Portfolio menu by clicking the <b>Buttons</b> option or the <b>Text</b> option. The other options on this page will differ depending on the option selected in this field.
<b>Buttons</b>	
<b>Button Type</b>	Select a button type by clicking on the drop-down arrow and highlighting a button type. The button type is simply the pattern that appears in the button background.
<b>Button Shape</b>	Click a button shape option.
<b>Button Style</b>	Select a button style by clicking on the drop-down arrow and highlighting a button style. The button style is made up of colors and shapes. Click <b>Gallery of Buttons</b> to preview button styles.
<b>Text</b>	
<b>Menu Background color</b>	Click <b>Pick</b> and select a color from the palette. The color chosen appears as the background color for the Basic Portfolio menu.
<b>Menu Text Color</b>	Click <b>Pick</b> and select a color from the palette. The color chosen appears as the text color for objects in the Basic Portfolio menu.
<b>Step 3: Basic Portfolio Welcome Page (Optional)</b>	
<b>Title</b>	Enter a title for the welcome message. The welcome message is the first page that appears when others view the Basic Portfolio.
<b>Welcome Message</b>	Enter a message to display to those who view your Basic Portfolio. This message appears on the first page of the Basic Portfolio.  The welcome message appears in the contents of the Basic Portfolio and can be modified just like any other Web page added to the Basic Portfolio.
<b>Step 4: Add Content (Optional)</b>	
<b>Menu Link Name</b>	Enter the name of the item. This title appears on the Basic Portfolio Menu item.
<b>File or Folder</b>	Enter the path to the item that will be added or click <b>Browse</b> to search the Content Collection for an item.
<b>Step 5: Add Links (Optional)</b>	
<b>Menu Link Name</b>	Enter the name of the item. This title appears on the Basic Portfolio Menu item.
<b>URL</b>	Enter a link to external Web pages.
<b>Step 6: Add Items (Optional)</b>	
<b>Menu Link Name</b>	Enter the name of the item. This title appears on the Basic Portfolio Menu item.

FIELD	DESCRIPTION
<b>Item Type</b>	Select <b>Blank Item</b> or select a Template from the list of Templates. Item content may be added to a Blank item after the Wizard is completed.
<b>Step 7: Basic Portfolio Availability</b>	
<b>Available?</b>	Determine if the Basic Portfolio will be available to other users.
<b>Step 8: Basic Portfolio Comments</b>	
<b>Shared?</b>	Determine if other users may share and add comments to the Basic Portfolio.

## CREATE A BASIC PORTFOLIO

### Overview

---

Basic Portfolios may be created from the Basic Portfolio Wizard or the Add Basic Portfolio page. After completing the Add Basic Portfolio page, a new Basic Portfolio appears in the My Portfolios folder. This new Basic Portfolio will be empty until content, in the form of content items, URLs, and custom-designed Web pages is added to the Basic Portfolio.

### Find this page

---

Follow these steps to open the Add Basic Portfolio page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Click **Add Basic Portfolio** from the Action Bar.

### Fields

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The Add Basic Portfolio page includes the following fields.

FIELD	DESCRIPTION
<b>Basic Portfolio Information</b>	
<b>Title</b> [r]	Enter a title for the Basic Portfolio. This name will identify the Basic Portfolio in the My Portfolios folder.
<b>Description</b>	Enter a description for the Basic Portfolio.
<b>Learning Objective</b>	Enter the objective of the Basic Portfolio.
<b>Basic Portfolio Menu Style</b>	
<b>Menu Style</b>	Select <b>Buttons</b> to make the areas of the Basic Portfolio Menu appear in a button format. If <b>Button</b> is selected, longer titles may not fully appear when the Button when displayed. Select <b>Text</b> to make areas of the Basic Portfolio Menu appear in a text format. See below for more information about Menu Styles.
<b>Basic Portfolio Availability</b>	
<b>Available</b>	Click <b>Yes</b> or <b>No</b> to determine if the Basic Portfolio will be available to other users.
<b>Comments Options</b>	
<b>Comments</b>	Click <b>Shared</b> or <b>Private</b> to determine whether or not comments can be added to the Basic Portfolio. For more information on managing comments for a Basic Portfolio please see the <a href="#">Manage Basic Portfolio Comments</a> topic.

## Text Menu Style

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When the Text Menu style is chosen an additional set of functions must be defined.

FIELD	DESCRIPTION
<b>Text Options</b>	
<b>Menu Background Color</b>	<p>Click <b>Pick Color</b> to open a palette. Move the mouse around the color field to see the different color variations. Single-click to select the color that appears.</p> <p>Alternatively, the hexadecimal RGB value can be entered in the text field. Entering the code allows a perfect match to a color. For example, a Basic Portfolio color scheme can be created to match a school's colors.</p> <p>The color selected will be used as the background for the Basic Portfolio's menu.</p>
<b>Menu Text Color</b>	<p>Click <b>Pick Color</b> to open a palette. Move the mouse around the color field to see the different color variations. Single-click to select the color that appears.</p> <p>Alternatively, the hexadecimal RGB value can be entered in the text field. Entering the code allows a perfect match to a color.</p> <p>The color selected will be used as the text color for the Basic Portfolio menu. Please make sure to select a text color that contrasts with the menu background color for easy viewing. After adding content to the Basic Portfolio, use the Preview function on the <b>My Portfolios</b> page to make sure that the color scheme looks good.</p>

## Button Menu style

---

When the Button Menu style is chosen, an additional set of functions must be defined.

FIELD	DESCRIPTION
<b>Select Style Properties</b>	
<b>Button Type</b>	Choose the Button Type from the drop-down list.
<b>Button Shape</b>	Click an option to choose the Button Shape.
<b>Button Style</b>	<p>Use the drop-down list to select the color of the buttons.</p> <p>Click Gallery of Buttons to view all of the button options.</p>

## Copy Basic Portfolio

---

The copy function in My Portfolios allows the creation of a new Basic Portfolio that is an exact replica of an existing Basic Portfolio. This function is very useful when there is a need for two similar Basic Portfolios. Create one Basic Portfolio, copy it, and then make changes to the new Basic Portfolio.



**TIP:** If many Basic Portfolios need to be created for a similar purpose, it is good practice to create one Basic Portfolio that contains the basics and the design, then copy it multiple times for other uses. For example, if a Student is preparing an achievement Basic Portfolio for multiple job interviews, he or she may want to create the design that best represents the work with links to content that demonstrates achievement. Then, for each interview, the Student may copy the Basic Portfolio and customize the new one for the specific potential employer, such as changing the welcome page text to a cover letter addressing that company then sharing the Basic Portfolio with the company.

When a Basic Portfolio is copied, the new Basic Portfolio is not shared to anyone, so it may be used for any purpose. If the original Basic Portfolio contains any broken links when copied, the system will notify the user so that he or she can run the Check Links tool and make corrections to both Basic Portfolios. Once copied, the two Basic Portfolios are completely independent. Any changes made to one Basic Portfolio do not affect the other.



**NOTE:** When a Basic Portfolio is copied, only the contents of the Basic Portfolio are included; the list of users the Basic Portfolio is shared with is not copied.

## Find this page

---

Follow these steps to open the Copy Basic Portfolio page.

1. Select folder view for the Content Collection menu.
2. Under the heading Basic Portfolios, click **My Portfolios**.
3. Click **Copy** for a Basic Portfolio.

## Fields

---

The Copy Basic Portfolio page includes the following fields.

FIELD	DESCRIPTION
<b>Basic Portfolio Name</b>	
Destination Basic Portfolio Name	Enter a name for the copied Basic Portfolio or leave the default name.
<b>Copy Comments</b>	
	Select the check box to copy comments that have been added to a Basic Portfolio.

## Basic Portfolio Copied receipt

---

The results of the Basic Portfolio copy appears on the Basic Portfolio Copied receipt page. If a new Basic Portfolio contains broken links to Content Collection items, those links were copied from the Source Basic Portfolio. Run the Basic Portfolio Link Checker on both basic Portfolios to make corrections.

Follow the steps below to access the Basic Portfolio Link Checker:

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to the Basic Portfolio name.
3. Click **Check Links**.

## BASIC PORTFOLIO CONTENTS

### Overview

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Contents for a Basic Portfolio are controlled through the Modify Content page. All of the objects that appear in the Basic Portfolio are arranged, in order of appearance, in a table.

Above the table is an Action Bar with buttons for adding and removing Content, External Links, and Items.

### Find this page

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Follow these steps to find the Basic Portfolio: Basic Portfolio Name page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Click **Modify** for a Basic Portfolio.
3. Click **Modify Content**.

### Add Content

---

Content Items from the Content Collection are added to a Basic Portfolio through the Add Content page. Note that the file or folder can be given a new Name within the Basic Portfolio. For example, if a file name in the Content Collection is “fred\_and\_sallys\_project”, it can be given the menu name of “The Civil War”.

When a Content Collection item is linked to in a Basic Portfolio, the item is shared with the Basic Portfolio User List. A line item for this user list appears on the Manage Permissions page for the item. If Read permission for Basic Portfolio User List is removed from the Permissions page, Basic Portfolio viewers will not have access to the item.

Follow these steps to add content.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Click the **Contents** link for a Basic Portfolio.
3. Click **Add Content** in the Action Bar.
4. Complete the Add Content page according to the table below.

FIELD	DESCRIPTION
<b>Menu Item Name</b>	
<b>Menu Item Name</b> [r]	Enter a title for the item. This name appears in the Basic Portfolio as the name of the item.
<b>Choose Content Collection Item or Folder</b>	
<b>File or folder</b> [r]	Enter the path to the item that will be added or click <b>Browse</b> to search the Content Collection for an item.
<b>Menu Item Availability</b>	
Available	Select <b>Yes</b> or <b>No</b> to determine whether or not the item is available when other users view the Basic Portfolio.

## Add Link

---

Links to external Web sites can be added to a Basic Portfolio from the Add Link page.

Follow these steps to add a link:

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Click the **Contents** link for a Basic Portfolio.
3. Click **Add Link** in the Action Bar.
4. Complete the Add Link page according to the table below.

FIELD	DESCRIPTION
<b>Menu Item Name</b>	
<b>Menu Item Name</b> [r]	Enter a name for the link. The text entered here appears in the Basic Portfolio menu as a hyperlink. Clicking on the hyperlink in the Basic Portfolio will open the URL entered in the <b>URL</b> field.
<b>Add External Link</b>	
<b>URL</b> [r]	Enter a URL for the link. Be sure to enter the URL completely, for example, <a href="http://www.blackboard.com">http://www.blackboard.com</a> , not <a href="http://www.blackboard.com">www.blackboard.com</a> , or <a href="http://www.blackboard.com">blackboard.com</a> .
<b>Menu Item Availability</b>	
<b>Available</b>	Select <b>Yes</b> or <b>No</b> to set the availability of the link.

## Add Item

---

Basic Portfolio items are Web pages created in the Text Box Editor by the user and added to a Basic Portfolio. There may be templates available for creating pages. Pages may also be created without a template using the Text Box Editor.

Follow these steps to add an item:

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Click the **Contents** link for a Basic Portfolio.
3. Click **Add Item** in the Action Bar.

Select a Blank Item or a template from the drop-down list to create a Web page. Templates are created by the System Administrator; if none are created or made available, this option will not appear.

## MANAGE BASIC PORTFOLIO

### Overview

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Users can manage the sharing, downloading, and comments for a Basic Portfolio from the Manage Basic Portfolio: Basic Portfolio Name page. They may also access the Properties page to modify the name, style or availability of the Basic Portfolio.

### Find this page

---

Follow the steps below to open the menu page with options for managing a Basic Portfolio.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.

### Comments

---

The Basic Portfolio Comments page includes columns displaying the date posted, the person who posted the comment, and the comment itself. Comments can be sorted by clicking the carat at the top of each column. For example, to sort comments by date, click the carat at the top of the Date Posted column.

Follow these steps to open the Comments page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Manage Comments**.

Comments are viewed, added, and removed from this page. Only the comment author or the owner of the Basic Portfolio may remove a comment.

### Link Checker

---

The Basic Portfolio Link Checker allows users to check the links to Content Collection items that have been added to a Basic Portfolio. For example, if an item in the Content Collection is removed after the user has created a link to the item in a Basic Portfolio, the Basic Portfolio Link Checker will detect this and make the user aware of the broken link.

Periodically checking links in a Basic Portfolio is good management practice. Links to Content Collection items from a Basic Portfolio may appear broken if identifying properties or permissions to the item are altered. The Check Links tool on the Manage page provides information on all links, and alerts the owner of any broken links. If a Basic Portfolio begins to show broken links, or users have trouble viewing a page in a Basic Portfolio, Check Links will identify the problem. Depending on the situation, some broken links may be repaired, while others may not.

Follow these steps to open the Basic Portfolio Link Checker page.

1. Click **My Portfolios** under the Basic Portfolios in the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Check Links**.

When **Check Links** is selected, the Basic Portfolio Link Checker automatically runs. The results appear on the Basic Portfolio Link Checker page.

## Link Checker Results

After the Basic Portfolio Link Checker is run, the results page appears, explaining the status of each link to a Content Collection item. Some broken links may be fixed by the user, while others may not.

LEGEND	DESCRIPTION AND RESOLUTION
	<b>Valid Link.</b> These items are linked successfully and do not require any further action.
	<b>Repairable permissions error.</b> One or more users on the Basic Portfolio User List do not have Read permission to these Content Collection items. The user checking the links has Manage permission to the items and can therefore repair these links. Select the check boxes next to these items and click <b>Repair</b> . The system will grant Read permission to these items to users on the Basic Portfolio User List.
	<b>Path not found.</b> The items have been moved, removed or renamed within the Content Collection. The links are broken and the user should remove them from the Basic Portfolio. If the new locations or names of the items are known, new links may be created.
	<b>Permissions error.</b> One or more users on the Basic Portfolio User List do not have Read permission to these Content Collection items. The user does not have Manage permission to the items and cannot repair these links. Remove these links from the Basic Portfolio or contact a user with Manage permission to these items to add the appropriate permission. System Administrators have Manage permission on all Content Collection items; they will never see this icon after running the tool.

## Download a Basic Portfolio

Any Basic Portfolio and its contents may be downloaded as a compressed zip file from the Manage Basic Portfolio page. The zip file contains the HTML pages and content items that make up the entire Basic Portfolio. This tool is useful for allowing users to archive older Basic Portfolios onto a personal computer, or for moving a Basic Portfolio to another Basic Portfolio system.



**NOTE:** Basic Portfolios must contain content to be downloaded; if a Basic Portfolio is empty the link to download will not appear.

Follow the steps below to download a Basic Portfolio.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Select **Download Basic Portfolio**.
4. After **Download Basic Portfolio** is selected on the Manage Basic Portfolio page, the Download Basic Portfolio: Basic Portfolio Name page appears.
5. Select the **Click to download Basic Portfolio** link. A window appears with options to open or save the Basic Portfolio.
6. Select **Save**, and save the Basic Portfolio to the desired location.

To view the Basic Portfolio, unzip the downloaded file to a local folder then click on "index.html" to open the Basic Portfolio.

## SHARE A BASIC PORTFOLIO

### Overview

---

A Basic Portfolio is private until the person who created it decides to share it with other users. The Basic Portfolio can be shared with individual users or all the users in a course or an organization. In addition, the Basic Portfolio can be shared with anyone who has an email address and access to the Internet.

The following list explains scenarios for sharing a Basic Portfolio:

- **Share a Basic Portfolio with another Blackboard user** - the Basic Portfolio is listed in the user's Received Basic Portfolios for easy access.
- **Share a Basic Portfolio with an external user** - a URL is created for access to the Basic Portfolio. This may be emailed to the user from the Content Collection.
- **Share a Basic Portfolio with a course or organization** - the Basic Portfolio is listed in the Basic Portfolios tool in the course, and course or organization users may search for the Basic Portfolio in Basic Portfolio Search.
- **Share a Basic Portfolio with an institution role** - all users with that role may search for the Basic Portfolio in Basic Portfolio Search.
- **Share a Basic Portfolio with All System Accounts** - any user on the system may search for the Basic Portfolio in Basic Portfolio Search.

### Basic Portfolio Search

---

All users with whom a Basic Portfolio is shared have the ability to find it using Basic Portfolio Search. Basic Portfolio Search allows users to search all Basic Portfolios that they have access to by username (the Basic Portfolio owner), Basic Portfolio title, Basic Portfolio description, and Basic Portfolio Learning Objectives. These fields are available from the Manage Properties page of every Basic Portfolio. Adding descriptive content to these fields will improve the results of Basic Portfolio Search.



**NOTE:** When a Basic Portfolio is shared with a user, the user must refresh his or her browser before the Basic Portfolio appears in **Received Basic Portfolios**. If permissions are removed for the user, the Basic Portfolio will continue to appear in the user's **Received Basic Portfolios** until they refresh the browser.

### Share with a Course or an Organization

---

A Basic Portfolio is shared with a course or an organization through the Share with Courses page or the Share with Organization page.



**NOTE:** Course Basic Portfolios may be enabled or disabled by the Instructor through Manage Tools on the Control Panel. If Course Basic Portfolios are available, Students may access them through Tools on the Course Menu.

Follow these steps to open the Share with Courses or Share with Organizations page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Share Basic Portfolio**.
4. Select **Share with Course** or **Share with Organization** from the drop-down list in the Action Bar.
5. Enter the Course ID or Organization ID that will be granted access at this time. Separate each ID by a comma. The Basic Portfolio can be shared with more courses or organizations at any time by returning to this page, privileges for all courses or organizations that should be allowed to view the Basic Portfolio do not need to be granted at the same time. The **Browse** function can be used to locate courses or organizations if the Course ID or Organization ID is not known.

---

### Share with Institution Roles

A Basic Portfolio is shared with users who have specific institution roles through the Share with Institution Roles page.

Follow these steps to open the Share with Institution Roles page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Share Basic Portfolio**.
4. Select **Share with Institution Roles** from the drop-down list in the Action Bar.

All roles available in the system appear in the multi-select box. This Basic Portfolio is available to users with roles that appear in the **Selected Roles** box. Select which roles have access to this Basic Portfolio in the **Available Roles** box. Use the arrows to move these roles to the **Selected Roles** box.

---

### Share with all system accounts

A Basic Portfolio is shared with all users who have an account on the *Blackboard Learning System* Share with the All System Accounts page.

Follow these steps to share a Basic Portfolio with all system accounts.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Share Basic Portfolio**.
4. Select **Send to All System Accounts** from the drop-down list in the Action Bar.
5. Select **Submit** to share this Basic Portfolio with all users who have an account on the system.

---

### Share with system users

Other users in the system can view a Basic Portfolio only if the Basic Portfolio creator shares it with them. Other users are granted access to a Basic Portfolio through the Send to User page.

Follow these steps to open the Share with User page.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.
2. Select **Modify** next to one of the Basic Portfolios.

3. Click **Share Basic Portfolio**.
4. Click **Share with User** from the Action Bar.
5. Complete the Share with User page according to the table below.

FIELD	DESCRIPTION
<b>Choose Users</b>	
<b>Usernames [r]</b>	Enter the username for each user that will be granted access at this time. Separate each username by a comma. The Basic Portfolio can be shared with more users at any time by returning to this page, privileges for all users that should be allowed to view the Basic Portfolio do not need to be granted at the same time.  The <b>Browse</b> function can be used to locate users if the username is not known.
<b>Email Information</b>	
<b>Send email?</b>	Select this option to send an automatically generated email to each user. The message will inform the users that they may access the Basic Portfolio.
<b>Subject</b>	Edit the subject for the email.
<b>Message</b>	Edit the body of the message inviting others to view your Basic Portfolio.
<b>Send copy of message to self?</b>	Select this option to send a copy of the email to the email account included as part of your <i>Blackboard Learning System</i> profile.
<b>Use blind carbon copy (Bcc:)</b>	Select this option to use the BCC: function. BCC: will hide the identity of those receiving the email from others receiving the same email. You, as the sender, will appear as the primary recipient of the message.

### Share with External Users

A Basic Portfolio can be shared with anyone with an email account and access to the Internet. Sharing a Basic Portfolio is an effective method for displaying your work to colleagues at other schools or even potential employers. Access to a Basic Portfolio can be restricted by setting an expiration time or date. Verify that each email address is entered correctly.



**NOTE:** The lifetime for Basic Portfolio shares are calculated not by the calendar but by increments of 31 days for a month and 365 days for a year. For example, a one month share will always expire 31 days later and a one year share will always expire 365 days later.

### Find this page

Follow these steps to share a Basic Portfolio with external users.

1. Click **My Portfolios** under Basic Portfolios on the Content Collection menu.

2. Select **Modify** next to one of the Basic Portfolios.
3. Click **Share Basic Portfolio**.
4. Click **Share with External Users** in the Action Bar.
5. Fill out the form using the table below as a guide.

FIELD	DESCRIPTION
<b>Choose Users</b>	
<b>To [r]</b>	Enter the email address of each person outside of the system that will receive access to the Basic Portfolio. Separate each email address with a comma. If your Basic Portfolio contains sensitive information, please verify that each email address is entered correctly.
<b>Email Information</b>	
<b>Subject [r]</b>	Edit the Subject line of the message. The default subject line is, "<username> has sent you a Basic Portfolio Invitation."
<b>Message</b>	<p>Edit the body of the message inviting others to view your Basic Portfolio.</p> <p>The default message includes the line &lt;BASIC PORTFOLIO_URL&gt;. Do not delete this line! It will be replaced with the URL pointing to the Basic Portfolio. Without this URL, outside users cannot view the Basic Portfolio.</p>
<b>Send copy of message to self?</b>	Select this option to send a copy of the email to the email account included as part of your <i>Blackboard Learning System</i> profile.
<b>Use blind carbon copy (Bcc:)</b>	Select this option to use the BCC: function. BCC: will hide the identity of those receiving the email from others receiving the same email. You, as the sender, will appear as the primary recipient of the message.
<b>Basic Portfolio Password</b>	
<b>Use password?</b>	Select this option to protect the Basic Portfolio with a password. If this option is selected, enter the password in the text field.
<b>Include password in email?</b>	This option only appears if the <b>Use Password</b> option was selected. Select this option to include the password in the email message to outside users. If the password is not included in the email it must be transmitted in some other way before the Basic Portfolio can be viewed.
<b>Expiration</b>	
<b>No Expiration</b>	Select this option to set an unlimited time for the Basic Portfolio share.
<b>Expires in</b>	Select a span of time for the Basic Portfolio share. Access to the Basic Portfolio will expire according to the selection. The countdown of the time until expiration begins when the Basic Portfolio share is created.

## CHAPTER 11—LEARNING OBJECTS CATALOG

### Overview

---

This chapter covers the Learning Objects catalog. The Learning Objects catalog is a repository within the Blackboard Content Collection that users may browse or search for entries that have been submitted. Users may nominate items for inclusion in the institution's internal Learning Objects catalog and for inclusion in a public catalog. Users selected as Catalog Managers determine how the catalog is organized and manage catalog entries submitted by users.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Learning Objects</a>	Provides instructions for searching the Learning Objects catalog.
<a href="#">Manage Catalog Categories</a>	Provides instructions for organizing the catalog and managing Learning Object entries.
<a href="#">Manage Catalog Entries</a>	Provides instructions for Learning Object reviewing entries that have been submitted.

## LEARNING OBJECTS

### Overview

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The Learning Objects page allows users to browse the contents of the Learning Objects catalog and search for specific items.

For information on adding entries to the Learning Objects Catalog, see the topic [Add Catalog Entry](#).



**NOTE:** If the *Blackboard Portal System* is installed, the Administrator may choose to make this feature available to all users in the system, or to users with specific roles.

### Find this page

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Select **View Catalog** in the Content Collection menu to open this page.

### Functions

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The Learning Objects page includes the following functions.

#### To . . .

search for an item in the catalog	enter the term to search for in the Search Criteria field and select <b>Go</b> . Once an item is located, select <b>Details</b> to view information about the entry. Clicking <b>Go</b> without specifying a search criteria will return all catalog entries.
browse the contents of the catalog	select links to different categories under <b>Browse by Category</b> . Categories are organized by subcategory; selecting one category may open a page with a number of subcategories to choose from.

### Search the catalog

---

The Learning Objects catalog may be searched from the Learning Objects page or from the Learning Objects area on the Content Collection menu. The Search feature searches the fields associated with a catalog entry. These include the following:

- Name
- Authors
- Description
- Keywords
- Learning Objectives

The contents of a file and the metadata of a file are not searched. Searches are not case sensitive.

The following types of searches are not supported:

- Wildcard search (for example, searching on Wash\* will not return Washington)
- Boolean operators
- Returning all catalog entries using \*
- Wildcard searches



**NOTE:** The catalog may also be searched from the Learning Objects area on the Content Collection menu.

## Permissions

---

When a catalog entry is submitted to the Internal Catalog, Read permission for that item is granted to All System Accounts for that item. When a catalog entry is submitted to the Public Catalog, Read permission to that item is granted to the Public for that item.



**NOTE:** The Administrator may make the Internal Catalog and/or the Public Catalog unavailable.

## MANAGE CATALOG CATEGORIES

### Overview

Catalog managers may organize the Learning Objects catalog according to the institutions needs. The Manage Catalog Categories allows managers to add categories to the top-level of the catalog, and subfolders within these categories. When entries are added to the catalog, they may be added to a top-level folder, or to any sub folder. Entries to multiple categories may be created for any single item.



**NOTE:** If *Blackboard Portal System* is installed, the Administrator may grant access to the Catalog manager functionality to users with specific roles in the system. Only these users may access the Manage Catalog pages.

### Find this page

Follow these steps to open the Manage Catalog Categories page.

1. Select **Manage Catalog** under Learning Objects in the Content Collection menu.
2. Select **Manage Catalog Categories**.

### Functions

The Manage Catalog Categories page includes the following functions.

To . . .	CLICK...
add a top-level category to the catalog	<b>Add Category.</b> The Create Category page will open. Enter the name of the category on this page.
add a subcategory to an existing category	the name of the category; this opens a page containing the subcategories and options for adding and managing them.
change an existing category	<b>Modify</b> next to the category name. The Modify Category page appears.
remove a category	select the check box next to the categories to remove and click <b>Remove</b> . This action will remove the category and all subcategories. All items in these categories will be moved to a system-created category called "Uncategorized". The Administrator may rename this category.

## MANAGE CATALOG ENTRIES

### Overview

Catalog managers review, accept and reject catalog entries on the Manage Catalog Entries page. All entries that users submit to the catalog appear on this page; a Catalog manager must accept an entry before the item appears in the catalog.

The status of catalog entries may be changed multiple times. For example, if a catalog manager approves an entry, a different catalog manager may decide this is not appropriate and reject the entry. The entry will be removed from the catalog, and the status will be Rejected on the Manage Catalog Entries page.



**NOTE:** If *Blackboard Portal System* is installed, the Administrator may grant access to the Catalog manager functionality to users with specific roles in the system. Only these users may access the Manage Catalog pages.

### Find this page

Follow these steps to open the Manage Catalog Entries page.

1. Select **Manage Catalog** under Learning Objects in the Content Collection menu.
2. Select **Manage Catalog Entries**.

### Functions

The Manage Catalog Entries page includes the following functions.

To . . .	CLICK...
approve catalog entries	the check boxes next to those entries to approve and select <b>Approve</b> . These items are added to the catalog.
reject catalog entries	the check boxes next to those entries to approve and select <b>Reject</b> . These items are not added to the catalog. If the items were approved before, they will no longer appear in the Catalog.
remove a catalog entry	the check boxes next to those entries to approve and select <b>Remove</b> . These items are removed from this page and will not appear in the catalog. This action is permanent; the item is removed from the catalog and the status can no longer be changed. This action removes the entry, but does not remove the item from the Content Collection.

To . . .	CLICK...
filter by the status of the entries	<p>the drop-down list in the <b>Status</b> field and select which entries to view. The following options are available:</p> <ul style="list-style-type: none"><li>• <b>Show All</b> – Displays all entries, including approved, pending and rejected</li><li>• <b>Pending</b> – Displays only entries that are pending</li><li>• <b>Approved</b> – Displays only entries that have been approved</li><li>• <b>Rejected</b> – Displays only entries that are rejected.</li></ul>
filter by catalog category	<p>the drop-down list in the <b>Category</b> field and select which entries to view. By default, the filter shows all categories.</p>

## CHAPTER 12—WORKFLOWS

### Overview

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This chapter covers Workflows. Workflows allow the user to assign and track tasks related to a content item.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Create a Workflow</a>	Provides instructions for creating a workflow.
<a href="#">Manage Workflows</a>	Provides links to areas for managing Workflows.
<a href="#">Workflows Sent</a>	Describes the Sent Workflows features.
<a href="#">Modify Workflow</a>	Details the Modify Workflow page.
<a href="#">Workflow Details</a>	Describes how to check the responses to a workflow.
<a href="#">Workflows Received</a>	Describes the Workflows Received features.
<a href="#">Workflow Response</a>	Provides instructions for responding to a workflow.
<a href="#">Workflow Comments</a>	Details the comments feature.

## CREATE A WORKFLOW

### Overview

---

The Workflow feature is a sophisticated tool for assigning and tracking tasks related to a content item. Although all workflows function in essentially the same way, the different types of workflow are designed to handle a wide range of tasks. The different workflows are:

- **Approve:** Use this workflow to ask other users to review a file or folder and validate it.
- **Complete:** Use this workflow to ask other users to complete work on a file or folder.
- **Grade:** Use this workflow to ask other users to review a file or folder and submit a grade.
- **Remind:** Use this workflow to prompt users to take action regarding a file or folder.
- **Review:** Use this workflow to solicit opinions or analysis on a file or folder from other users.
- **Share:** Use this workflow to collaborate with other users.

Workflows are built and sent to other users from the Create Workflow page. The steps for creating a workflow are the same for each type of workflow.

### Find this page

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Follow these steps to open the Create Workflow page.

1. Open the area of the Content Collection where the item or folder appears.
2. Check the box next to the item or folder.
3. Select **Add Workflow** from the drop-down menu in the Action Bar and click **Go**.

### Fields

---

The Create Workflow page includes the following fields.

FIELD	DESCRIPTION
<b>Activity Information</b>	
<b>Name [r]</b>	Enter a title for the Workflow. This name appears in the Workflows Received for users selected to receive the workflow.
<b>Instructions</b>	Enter any instructions for completing the task.
<b>Type</b>	Select the type of Workflow that will be created.
<b>Priority</b>	Select a priority from the drop-down lists. There are three levels of importance that can be assigned to a Workflow: <ul style="list-style-type: none"> <li>• High</li> <li>• Normal</li> <li>• Low</li> </ul>
<b>Deadline</b>	Enter a date that the Workflow must be completed in MM/DD/YYYY format or use the calendar pop-up to select a

FIELD	DESCRIPTION
	date from a graphical interface. A link to the calendar pop-up appears next to the field.
<b>Send Activity to Users</b>	
<b>Username</b>	Enter the Username of each user that will receive the workflow. Separate Usernames by commas. The <b>Browse</b> button next to the field will open a search function to help find users. Usernames can be selected and added to the Workflow directly from the search results.
<b>Email Users</b>	Select this check box to notify users of the new Workflow with an email message. The email message is automatically generated and sent. It contains a link to the Workflow and the subject line is "Your Name has sent you an Activity."
<b>Send Activity to Courses</b>	
<b>Courses</b>	Check the box for each course that will receive to the task.
<b>Additional Courses</b>	Enter the Course ID for each course that will receive the task. Multiple Course IDs must be separated by commas.
<b>Roles</b>	Check the box for each user role within the courses selected that will receive the task.
<b>Email Course Users</b>	Select this check box to notify course users of the new workflow with an email message. The email message is automatically generated and sent. It contains a link to the workflow and the subject line is "Your Name has sent you an Activity."
<b>Content Items</b>	
<b>Files and Folders</b>	Enter the path to a folder or file to include in the workflow or click <b>Browse</b> to open a pop-up window with the Content Collection directory so you can search and select the folder or file. It is possible to include multiple folders and files in a Workflow.
<b>Permissions</b>	Select each permission that users should have on the file or folder included in the Workflow.

## MANAGE WORKFLOWS

### Overview

---

Workflows allow tasks for a content item to be assigned and tracked. The Manage Workflows page enables the user to assign activities to other users and track those activities that have been assigned to him or her.

### Find this page

---

Select **Workflow Activities** under Tools on the Content Collection menu.

### Functions

---

The Manage Workflows page includes the following functions.

To . . .	CLICK . . .
manage and assign tasks to other users	<b>Workflows Sent.</b> The <a href="#">Workflows Sent</a> page appears.
view tasks you have received	<b>Workflows Received.</b> The <a href="#">Workflows Received</a> page appears.

## WORKFLOWS SENT

### Overview

---

The Workflows Sent page lists all the Workflows that you have created and sent to other users. Users may add additional items to the Workflow from this page. Each Workflow is listed as a row in a table. Each row includes the following for each Workflow, from right to left:

- A checkbox for selecting the Workflow.
- The Name of the Workflow. The Name appears as a link.
- The Type of Workflow.
- The Priority assigned to the Workflow.
- The date that responses are due back from Workflow recipients.
- The number of comments associated with the Workflow appears as a link.
- A link to the Modify Workflow page.

### Find this page

---

Follow these steps to open the Workflows Sent page.

1. Select **Workflow Activities** under Tools on the Content Collection menu.
2. Click **Workflows Sent**.

### Functions

---

The following functions are available on the Workflows Sent page.

To . . .	CLICK . . .
view the responses to a Workflow from other users	the link in the Title column for the Workflow. The Workflow Detail page appears.
review or add comments to a Workflow	the number in the Comments column for the Workflow. The <a href="#">Comments</a> page appears.
make changes to an existing Workflow	the Modify link in the Modify column. The <a href="#">Modify Workflow</a> page appears.
create a Bookmark to an item	<b>Bookmark Items.</b> The Create Bookmark page appears. Enter a name for the Bookmark and submit it. The new Bookmark appears on the <a href="#">Bookmarks</a> page.
create a new Workflow	the drop-down menu in the Action Bar and select the type of Workflow to create. After selecting the type of Workflow, click <b>Go</b> and the Add Workflow page appears.

To . . .	CLICK . . .
delete Workflows	the checkbox for each Workflow that will be deleted. Click <b>Remove</b> in the Action Bar and the selected Workflows will be deleted.

## MODIFY WORKFLOW

### Overview

The Modify Workflow page allows for some changes to a Workflow once it has been created. The users who receive the Workflow and the file or folder associated with the Workflow cannot be changed.



**NOTE:** This page cannot be used to modify the users assigned to a Workflow. Users may be removed from a Workflow from the Workflow Details page.

### Find this page

Follow these steps to find the Modify Workflow page.

1. Select **Workflow Activities** under Tools on the Content Collection menu.
2. Click **Workflows Sent**.
3. Click **Modify** for a Workflow. The Modify Workflow page appears.

### Fields

The Modify Workflow page includes the following fields.

FIELD	DESCRIPTION
<b>Activity Information</b>	
<b>Name</b>	Edit the title for the Workflow. This name appears in the Workflows Received for users selected to receive the Workflow.
<b>Instructions</b>	Edit the instructions for completing the task.
<b>Type</b>	Edit the type of Workflow that will be created.
<b>Priority</b>	Select a priority from the drop-down lists. There are three levels of importance that can be assigned to a Workflow: <ul style="list-style-type: none"> <li>• High</li> <li>• Normal</li> <li>• Low</li> </ul>
<b>Deadline</b>	Enter a date that the Workflow must be completed in MM/DD/YYYY format or use the calendar pop-up to select a date from a graphical interface. A link to the calendar pop-up appears next to the field.
<b>Send Activity to Users</b>	
	Displays the users that received the Workflow.
<b>Content Items</b>	
	Displays the items and folders attached to the Workflow.

## WORKFLOW DETAILS

### Overview

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Responses to a Workflow are recorded on the Workflow Detail page. Only the sender of the Workflow can see all the responses to a Workflow. The Workflow Detail page lists each response in a table, for each response, the following information is displayed:

- Check box for selecting the response.
- Person who sent the response.
- Response details.

### Find this page

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Follow these steps to find the Workflow Detail page.

1. Select **Workflow Activities** under Tools on the Content Collection menu.
2. Click **Workflows Sent**.
3. Click the link for a Workflow. The Workflow Details page appears.

### Functions

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The following functions are available from the Workflow Detail page.

To . . .	CLICK . . .
view the items attached to the Workflow	the file name for the item. A list of items appears, as links, in the <b>Content Items</b> field.
remove user responses to the Workflow	the checkbox for the responses to delete and click <b>Remove</b> from the Action Bar.

## WORKFLOWS RECEIVED

### Overview

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Workflows sent to you by other users will appear on the Workflows Received page. The page lists each Workflow that you have received in a table, with a separate row for each Workflow. Each row contains the following information about each Workflow:

- A checkbox for selecting the Workflow.
- The name of the Workflow.
- The type of Workflow.
- The importance of the Workflow.
- The date the Workflow must be completed.
- The person who sent the Workflow.
- The status of the Workflow. The status is set by you after reviewing the Workflow.
- The number of comments associated with the Workflow. This appears as a link.

### Find this page

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Follow these steps to open the Workflows: Activities Received page.

1. Select **Workflow Activities** under Tools on the Content Collection menu.
2. Click **Workflows Received**.

### Functions

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The following functions are available from the Workflows Received page.

To . . .	CLICK . . .
respond to a Workflow	the link for the Workflow in the Title column. The Activity: Details page appears.
remove Workflows	the checkbox for each Workflow that will be removed then click <b>Remove</b> from the Action Bar.
read or add a comment	the number in the Comments field for a Workflow. The Comments page appears.

## WORKFLOW RESPONSE

### Overview

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After reviewing the content items attached to a Workflow use the Activity: Details page to send a response back to the person that sent the Workflow. The response will include a progress update and any details you wish to provide.

### Find this page

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Follow these steps to open the Workflow Details page.

1. Select **Workflows** under Tools on the Content Collection menu.
2. Click **Workflows Received**.
3. Click the link for a Workflow.

### Fields

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The Workflow Details page includes the following fields.

FIELD	DESCRIPTION
<b>Activity Information</b>	
<b>Name</b>	Displays the title of the Workflow.
<b>Instructions</b>	Displays instructions on completing the Workflow from the sender.
<b>Priority</b>	Displays the priority of the Workflow. There are three possible priorities: High, Normal, and Low.
<b>Deadline</b>	Displays the date the sender would like the Workflow completed.
<b>Content Items</b>	Displays the content items attached to the Workflow as links. Click a link to view the file.
<b>Status Information</b>	
<b>Status</b>	Select a status from the drop-down menu. The options will differ depending on the Workflow. For example, a Workflow that requires grading will have the options: Not Started, Pending, and Graded.
<b>Response</b>	Add details to the response. For example, if the Workflow requires a grade enter it in this field.

## WORKFLOW COMMENTS

### Overview

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Comments can be applied to a Workflow just like a file, folder, or Portfolio. Comments are a means of saving or communicating quick notes about a Workflow. Each comment is listed in a row on the page. Each row has the following information:

- The date the comment was created.
- The person who created the comment.
- The text of the comment.

### Find this page

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Follow these steps to open the Comments page for a Workflow.

1. Select **Workflows** under Tools on the Content Collection menu.
2. Click **Workflows Sent** or **Workflows Received**.
3. Click the number in the Comments column for a Workflow. The Comments page appears.

### Functions

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The following functions are available on the Comments page for a Workflow.

To . . .	CLICK . . .
post a comment	<b>Add Comment</b> from the Action Bar. A text box appears. Enter a comment and click <b>Submit</b> .
delete comments	the checkbox next to each comment that will be deleted then click <b>Remove</b> in the Action Bar.
sort comments	the carat above a column to sort comments by that column.

## CHAPTER 13—GROUP COLLABORATION

### Introduction

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Some of the most valuable features of the Content Collection are those that allow users to share documents in group settings. Traditionally, group members maintain multiple copies of similar documents, and email various versions to others in the group. The Content Collection greatly simplifies the group collaboration process by providing powerful tools for sharing, versioning and locking files and folders. Workflow Activities can also enhance the traditional process of sharing documents.

### In this chapter

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This chapter includes the following topics.

TOPIC	DESCRIPTION
<a href="#">Create a Group Folder</a>	Create a folder that is shared with a group.
<a href="#">Share a Group Folder</a>	Grant permissions to members of a group.
<a href="#">Locate a Group Folder</a>	Search for and find a group folder.
<a href="#">Collaborate on Documents</a>	Work on documents as a group.

## CREATE A GROUP FOLDER

### About group folders

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Users collaborating in a group often require access to a shared set of documents. A group may be created informally as a collection of users who wish to collaborate, or may be created formally using the course or organization Groups functionality in the *Blackboard Learning System*. The first step to sharing documents is to create a group folder that can be accessed by each member of the group. Creating a group folder is not required (group members can collaborate on a single file), but establishing a specific folder may be helpful for sharing a collection of files.

### Create a group folder

---

Follow the steps below to create a group folder:

1. Open the Content Collection tab, and browse to the location to create the group folder. A common location is within the username folder, such as: `/users/jsmith`.
2. Select **Add Folder** in the Action Bar
3. Enter a folder name, such as 'Biology Group Folder', and complete the rest of the page.

## SHARE A GROUP FOLDER

### About shared group folders

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After the group folder is created, the user must provide the appropriate permission to other group members. If Instructor has created Groups in the course, users can share the folder with all members of a Group in a single step. If the Instructor modifies the Group members in the future, the Content Collection will automatically share the folder with the updated Group members.

### Share with a course Group

---

Follow the steps below to share a folder with a course Group:

1. Select **Permissions** next to the group folder. If Permissions is not visible, select **Modify**, then **Permissions**.
2. From the drop-down list in the Action Bar, select **Course Group User List** (or **Organization Group User List** if the Group belongs to an organization). Select **Go**.
3. The page displays all course Groups in which the user is enrolled. Select the check box next the Group name with which to share the folder. Multiple Groups may be selected.
4. Select the appropriate permission check boxes. To grant the group full permissions, select all of the check boxes.

### Share with a user group

---

If the user would like to share a folder with a group of users that exists outside of a course or organization Group, the folder must be explicitly shared with each group member. Follow the steps below:

1. Select **Permissions** next to the folder. If Permissions is not visible, select **Modify**, then **Permissions**.
2. Select **Add Users** in the Action Bar.
3. Enter the username of each group member, separated by commas, in the **Choose Users** field. Click **Browse** to locate unknown usernames.
4. Select the appropriate permission check boxes for these users. To grant all members of the group full permissions, select all of the check boxes.

## LOCATE A GROUP FOLDER

### Locate a group folder

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After a user creates the shared folder in the desired location, other group members need a simple way to locate and access the folder. The easiest way to achieve this is for all other group members to create Bookmarks to the folder.



**NOTE:** The creator of the group folder should inform each group member of the folder location.

Follow the steps below to create a Bookmark:

1. Open the Content Collection tab, and click Bookmarks in the Tools area.
2. Select **Add Bookmark** in the Action Bar.
3. Enter a Bookmark name.
4. Enter the location of the Bookmark, such as:  
/users/jsmith/Biology Group Folder (note the forward slashes: / ) Bookmark locations are case-sensitive.

Once the Bookmark is created, the user selects **Bookmarks** in the Content Collection Menu, and then clicks the Bookmark name to access the shared group folder. The creator of the group folder may access the folder directly through his or her username folder. If all group members have been granted full permissions, they may add, modify, and remove any file or folder within the group folder.



**NOTE:** Users may also locate the group folder by selecting Search in the Tools area.

## COLLABORATE ON DOCUMENTS

### About group collaboration

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The Content Collection includes numerous tools that allow users to collaborate on group projects.

### Versioning

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Versioning keeps track of every saved instance of a file to make it easy to roll back to a previous draft. The versioning feature creates a history of the changes that have been made to a document.

For example, a group collaborates on a final research paper and many modifications are made throughout the semester. One group member accidentally deletes an important graph from the document. Fortunately, the graph exists in a previous version of the document, so the group can easily retrieve the graph from the version history.

For more information on versioning, please see the [Versions](#) section.

### Workflow

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Group members may take advantage of Workflows in the Content Collection. Workflows allow users to assign tasks to other users and request a specific action in return.

For example, a group of Students is collaborating on a final project. After creating the outline of the project, the group seeks feedback from the Instructor to determine if the outline meets the Instructor's expectations. A group member creates a Review Workflow, indicates the priority and deadline, and sends it to the Instructor. The Instructor receives the Workflow, reviews the outline, and returns the Workflow to the group. All of this activity occurs inside the Content Collection (in the **Workflow** section of the **Tools** area), without the need for email and attachments.

For more information on versioning, please see the [Manage Workflows](#) section.

### Locks

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A lock on a folder secures the folder itself (name and settings) from changes. Locking the folder and all its contents protects both the folder itself and the materials it contains. A group member can use locks to ensure that other group members do not access the folder while its files are open for modification. For example, one group member opens up the group folder to edit multiple documents throughout the day. To prevent other group members from making changes to documents while work is being done (thus overwriting the modifications), the user creates a lock on the folder and all the files within it.

Follow the steps below to lock a folder and all of its contents:

1. Open the Content Collection tab and locate the folder to be locked.
2. Select **Modify** next to the folder name, and then select Properties.
3. In the Lock Options section, select Lock this folder and everything it contains.

After creating the lock, any user with at least Read permission can continue to read the files in the folder. However, the lock prevents another user from making changes to the items in the folder, even if that user has Write permission on the item. After the changes are complete, the user that created the lock must remove it to allow other group members to resume full access. Locks may also be created on individual files, rather than on an entire folder.

## Comments

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Group members may use the Comments feature to share information on items. For example, one group member writes the draft of final research paper. Another member edits the draft and adds comments for other group members to review. In essence, the Manage Comments area may be used as a discussion area for files and folders.

## Tracking

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Group members may enable Tracking to view the history of all interactions with a file. The Tracking log indicates information such as when a group member reads or modifies a file.