

Blackboard



# Academic Suite™

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## Content System User Manual

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## Introduction

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### Overview

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, Instructors, librarians, and other members of an educational community.

### About the Blackboard Content System

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 Community 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

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.

Blackboard Inc. develops, licenses, and supports enterprise software applications for the global education market. Working in concert with client-institutions and 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. The Blackboard Academic Suite of enterprise applications includes the Blackboard Learning System™, Blackboard Community System™, and Blackboard Outcomes System™, as well as the Blackboard Content System. Through the use of Building Blocks<sup>SM</sup> 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

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
Bold type	A button or field name.
[r]	Required field.
Courier Font	Text that users should type.
Steps	Tasks users should perform.

# 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 section

This section 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 Blackboard 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 Blackboard 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

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### 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**

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### **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**

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### **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 Blackboard Content System folder that contains any items or folders that have been removed from the Blackboard Content System. Any user can restore items from the Recycle Bin to the Blackboard Content System.

 <p><b>Warning</b></p>	<p><b>Warning: If the Recycle Bin is disabled, any items or folder removed from the Blackboard Content System are permanently deleted.</b></p>
---	--

### 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.

 <p><b>Note</b></p>	<p><b>Note:</b> The Recycle bin does not appear until the first item is deleted.</p>
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### 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 Yes 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 Blackboard Content System.
Remove	Select items or folders and click Remove to permanently delete them from the Blackboard 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.

<b>Function</b>	<b>Description</b>
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 Go.
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 Go.

## Unique ID Tool

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### Overview

In previous versions of the Blackboard Content System, links to the Blackboard 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 Blackboard 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 Blackboard Content System items. This unique ID never changes, even if the item is moved within the Blackboard Content System.



**Note:** If you are installing the Blackboard 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 Blackboard 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

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### 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 StudentGrades.

### 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.

# View Content

## Overview

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

## In this section

This section 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.
<a href="#">360 Degree View</a>	Users have access to a single holistic view of a Blackboard Content System item by using the 360° View.

## Access the Content Collection

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### 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

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### 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

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### 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

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### 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. CourseInstructors 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

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

## Folders and Items

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### 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 (Undefined variable: BbVariables\_AS.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

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

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### Overview

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

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

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

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

### Location bar

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

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

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### Overview

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

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

### Fields

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.
<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

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

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### Overview

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

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

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### 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

#### 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

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

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**

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.

## 360° View

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### Overview

Users have access to a single holistic view of a Blackboard Content System item by using the 360° View. Information available using this view includes the following:

- the properties of the item located on various pages in the interface,
- the information on the links that exist to this item, and
- the metadata information associated with the item.

The 360° View is visible from the Content Collection, the Search Results and when linking to an item.

### Find this page

Click the 360° View icon on the row of the appropriate Blackboard Content System item to bring up the 360° View page for that item.

### Functions

The 360° View page contains the following information.

File Data	Description
<b>About this File</b>	
Properties	Basic properties of the file are displayed here, including: Name, Location Path, Location URL, Permanent URL, File Type, File Size, Owner, Created By, Created On, Last Modified By, Last Modified On, and Lock Status.
Comments	Any comments that have been made about the file are displayed here.
Versions	Version information is displayed here including: Version Number, Created, Created By, Size, and Lock Status.
Learning Objects Catalog Entries	Any entries in the Learning Objects Catalog related to the file are displayed here. Information includes: Name, Category, Authors, Catalog Type, and Status.
<b>File Activity</b>	
Permissions	All permissions assigned to the file are displayed here.
Passes	Any passes that are associated with this file are displayed here.
<b>Links</b>	
Links	This includes a list of the Courses, Organizations and any Instructors associated with the item.
<b>Tracking Data</b>	
Tracking Data	Any tracking data associated with this file is displayed here.

File Data	Description
<b>Metadata</b>	
Dublin Core Metadata	Dublin Core Metadata information is displayed here. See <a href="#">Manage Dublin Core Metadata</a> for more information.
Full IMS Metadata	Full IMS Metadata information is displayed here. See <a href="#">Manage Full IMS Metadata</a> for more information.
General Metadata	General Metadata information is displayed here. See <a href="#">Manage General Metadata</a> for more information.
IMS Metadata	IMS Metadata information is displayed here. See <a href="#">Manage IMS Metadata</a> for more information.
User-Defined Metadata ( <a href="#">Manage Custom Metadata</a> )	Metadata information that has been defined by users is displayed here.

# Search Content

## Overview

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

## Contents

This section 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="#">Discover Content</a>	Users can search for and insert Reusable Objects into their Courses.
<a href="#">Quick Search from the Tools Menu</a>	Explains the Quick Search tool.

## Search Overview

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### About Search

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

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

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

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

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

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

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

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

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>
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.

Field	Description
Search Recycle Bins	Choose whether or not to search the Recycle Bins by using the Yes or No radio buttons. This option only appears if the Recycle Bin is enabled.

## Perform an Advanced Search

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### About Advanced Search

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

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

## 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

**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

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

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>	Enter one or more usernames, or use <b>Browse</b> to search for users  Portfolios created by that user(s) that have been shared to you are displayed
<b>Name/Description</b>	Enter Portfolio Names or Descriptions  Partial names and descriptions are allowed  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.  Portfolios matching the search criteria that have been shared to you are displayed

Field	Description
<b>Learning Objectives</b>	Enter Learning Objectives Partial names and descriptions are allowed If more than one word is entered, all words must appear in the Learning Objectives in that particular order Portfolios matching the search criteria that have been shared to you are displayed
<b>Save this Search as</b>	Enter one or more usernames, or use <b>Browse</b> to search for users Portfolios created by that user(s) that have been shared to you are displayed

### 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

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### About Search Results

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

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

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

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

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

### Search Results Functions

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.
remove an item from the search results	the checkbox next to the items to delete and select <b>Remove</b> .

To . . .	click . . .
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

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### About Saved Searches

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 Blackboard 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 Blackboard 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.

## Discover Content

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### Overview

The Discover Content function is available throughout a Course. Users can search for and insert Reusable Objects into their Courses.

Grade Center and Discussion Board work slightly different than Blackboard Content System items.

### Find this page

Click **Course Documents** from within a Course and then click the **Edit View** link. Click the **Discover Content** button to display the **Discover Reusable Objects** field.

### Follow these steps

To use Discover Content:

1. Choose a **Reusable Object** from the drop-down list.
2. Click **Go**. A window appears with all of the appropriate Reusable Objects that are available to the Course.
3. Select an item from the list by clicking its associated radio button.
4. Click **Submit**. The **Add (Reusable Object)** page appears.
5. Enter a name for the reusable object in the **Name** field.
6. Enter appropriate information in the remaining fields.
7. Click **Submit** when finished. The Course Documents page is displayed with the reusable object added to the list.

## Quick Search from Tools Menu

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### About Quick Search

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.

# Create Content

## Overview

This section covers how to create folders and items and move them around the Content Collection.

## In this section

This section 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 a Reusable Object</a>	Blackboard Content System Users can author content by using any VTBE from within the Blackboard Learning System.
<a href="#">Create External Link</a>	Explains how to create links to outside Web sites and add them to the Content Collection.
<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 Blackboard Content System users can download items, including any associated metadata.
<a href="#">Upload Package</a>	Explains how Blackboard Content System users can upload a previously downloaded package of Blackboard Content System items and their associated metadata

## Create a Folder

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### 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 the 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</b> [r]	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: No Lock Lock This Folder Lock this Folder and everything it contains
<b>Comment Options</b>	

Field	Description
<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

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### 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</b> [r]	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
<b>Metadata</b>	

Field	Description
<b>Metadata Template(s)</b>	The metadata templates that are available are displayed here. Click the plus sign to expand the metadata fields. Enter the appropriate data in each field. Required fields must be completed before the page is submitted.

## Create a Reusable Object

---

### Overview

Blackboard Content System Users can author content by using any VTBE from within the Blackboard Learning System. This content can be used anywhere in the system and uses the same settings as other Blackboard Content System items. Users can designate any item created with the Virtual Text Box Editor (VTBE) anywhere in the Blackboard Academic Suite as a Reusable Object and select a storage location for it. Reusable Objects may be copied and reused just as other Blackboard Content System Items.

Reusable Objects are embedded within the Blackboard Content System when they are created. For example: if a Snippet is created with HTML and images, the HTML code and the images are displayed on the resulting page not as a link to another item within the Blackboard Content System.

Reusable Objects come in the following types:

- Snippet
- Assignment
- Course Content
- Discussion Topic
- Portfolio Content

Each of these types is created by following the same procedure.

### Find this page

Use the Add drop-down list on the Action Bar to choose the type of Reusable Object to be created and click Go. The Add Reusable Object page appears.



**Note:** The Reusable Object is created in the folder the user is viewing when Go is clicked.

### Follow these steps

To create a Reusable Object:

1. Enter a name for the Reusable Object in the **Name** field.
2. Click the **Overwrite if a file with the same name exists** checkbox to overwrite an already existing file.
3. Use the Visual Text Box Editor to create the Reusable Objects. See the Blackboard Academic Suite User Manual for more information on using the Visual Text Box Editor.
4. Click the **Save Text as Reusable Object** checkbox.
5. Click any of the following checkboxes to enable the appropriate option:
  - Lock File

- Share Comments
  - Enable Versioning
  - Enable Tracking
6. Click **Submit** when finished.

## Create External Link

---

### Overview

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**

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### **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**

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

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### 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

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### Overview

Blackboard 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 Blackboard 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

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### Overview

Blackboard Content System users can upload a previously downloaded package of Blackboard 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 Blackboard Content System and it must be in the form of .ZIP file.

### Upload a package

Follow these steps to upload a package to the Blackboard 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.

# Using Permissions

## Overview

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.

This section describes permissions and how they are used in the Content Collection.

## In this section

This section 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

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### About Permissions

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

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### 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 Community System is installed, the Administrator may make folders available to users with specific (Undefined variable: BbVariables\_AS.institution role)s.

**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. (Undefined variable: BbVariables\_AS.organization user folder)s 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:

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 a user list in the drop-down list on the Action Bar. The Add User List page appears.
5. Complete and submit the Add User List page

 <p><b>Note</b></p>	<p><b>Note:</b> 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.</p>
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### Granting permissions to folders v. items

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

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

### Viewing files and folders

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.	Course folders are not created in the Content Collection until the Instructor, Teacher's Assistant, or Course Builder has accessed the Content Collection.  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.
A user is enrolled in an Organization, but the (Undefined variable: BbVariables_AS.organization user 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.	The Portfolio User List no longer has Read permission to all items linked to in the Portfolio. 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.
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
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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. Note: 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.

	<p><b>Note:</b> 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.</p>
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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
Tracking – enable/disable	Read and Manage permissions on the item
Versions- checkout a file	Read and Write permissions on the item

Action	Required Permissions
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

# Manage Folders

## Overview

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

## In this section

This section 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 (Undefined variable: BbVariables_AS.institution role)s 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.
<a href="#">Notifications</a>	Explains how users can subscribe to a directory to receive notification that items were added, or that certain items were modified (such as permission or metadata changes).

## Find Folder

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### 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 (Undefined variable: BbVariables\_AS.organization user 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 (Undefined variable: BbVariables\_AS.organization user 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**

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### **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

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### 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.
<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.

Field	Description
<b>Available Quota</b>	<p>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.</p> <p>The quota for a folder cannot exceed the available space in the folder that will hold it.</p>
<b>Lock Options</b>	
<b>Lock</b>	<p>Select a lock for the folder from the following options:</p> <ul style="list-style-type: none"> <li>o No Lock</li> <li>o Lock This Folder</li> <li>o 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 (Undefined variable: BbVariables\_AS.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 Manage Permissions for a Folder.
<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 a Course User List 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 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 Manage Permissions for a Folder for a description of each permission.
<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 an Institution Role User List to a Folder

---

### Overview

Adding (Undefined variable: BbVariables\_AS.institution role)s 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>	
(Undefined variable: BbVariables_AS.institution role)s [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 Manage Permissions for a Folder.
<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 Manage Permissions for a Folder.
<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 Manage Permissions for a Folder.
<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 Manage Permissions for a Folder.
<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

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### 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 Manage Permissions for a Folder.
<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.

## Folder 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 Set Private/Shared Comments page appears.
add and manage comments	<b>Manage Comments.</b> The Comments 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.

## Notifications

---

### Overview

Users can subscribe to a directory to receive notification that items were added, or that certain items were modified (such as permission or metadata changes). Users must have Manage permissions on the item to subscribe.

### Find this page

Follow these steps to open the Notifications page:

1. Click the **Modify** button associated with the appropriate folder.
2. Click **Notifications**.

### Functions

The Notifications page contains the following functions:

Function	Description
Location	Displays the path for the folder.
Add Notifications	Click this to add a notification to this folder.
Remove	Click this to remove any selected notifications.
Subscriber	Displays the name of user who has subscribed to this folder.
Frequency	Displays the frequency of this notification.
Notification Type	Displays the notification type.
Expiration Date	Displays the expiration date for this notification.

### Follow these steps

To subscribe to a folder:

1. Navigate to the **Notifications** page for the appropriate folder.
2. Click **Add Notifications**.
3. Select the type of notification to receive: **Folder Modification**, **Contents Accessed**, and/or **Comment Modification**. Users can select any or all of these types.
4. Select the notification frequency by clicking either the **Immediately** or **Daily** radio button. Immediately means an email is sent every time something changes within the folder. Daily means a daily digest is sent containing of all of the changes on a folder for a specific notification type.
5. Choose the expiration date for this notification by clicking the **Date Specified** radio button and using the **month**, **day**, and **year** fields. Click the **No Date** radio button to specify no expiration date.
6. Click **Submit** when finished.

# Manage Items

## Overview

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

## In this section

This section 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="#">Adding Dynamic Metadata</a>	Describes how Instructors can add metadata to a Blackboard Content System item while adding the item to a Course.
<a href="#">Metadata Attributes</a>	Describes how existing attributes may be added to metadata templates and how to create new attributes.
<a href="#">Add Attribute</a>	Explains how Librarians can create custom metadata attributes by using the Add New Field page.
<a href="#">Batch Add Attribute Options</a>	Describes how Librarians and Administrators can create a list offline of options for metadata values in a structured metadata field and then batch upload the list.
<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="#">Add Instructions</a>	Describes how users can add instructions that appear at the top of the page of a Metadata Template.
<a href="#">Add Step Header</a>	Explains how users can add a graphical break in a metadata template, which can be used to logically group data entry fields.
<a href="#">Add Field</a>	Describes how to add individual data fields where users can interact with the metadata template.
<a href="#">Format Field</a>	Explains how to format data fields on the metadata template.
<a href="#">Modifying Metadata Templates</a>	Details how users can create remove and customize the fields that are used on metadata templates.

Topic	Description
<a href="#">Modify Metadata Template Properties</a>	Explains how metadata template properties allow users to access templates, assist in batch operations, and provide description data to the Template Builder.
<a href="#">Modify Metadata Template Availability</a>	Describes how Librarians and other users can control the usage of metadata templates by making them available to a select group of Blackboard Content System users.
<a href="#">Modify Metadata Template Forms</a>	Explains how individual attributes can be added, modified, or removed from the metadata template
<a href="#">Remove an Attribute</a>	Describes how custom metadata attributes can be removed from the system
<a href="#">Modify Attribute</a>	Explains how Librarians can modify attributes to suit their needs and the needs of the Institution.
<a href="#">Search for Attributes</a>	Describes how the Search function allows users to search for attributes based on several different parameters, including attribute value, availability, and specific text.
<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 User or User List to an Item</a>	Provides instructions for granting users access to an item.
<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

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### 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 Blackboard Content System items no longer break.
File Type	Displays the type of file.
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.
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.

Field	Description
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

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### 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 Blackboard 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. In addition, Standards, Objectives and Goals that are created in the Outcomes system may also be treated as metadata and used to align Blackboard Content System items.



**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 Manage Dublin Core metadata 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 Manage Full IMS metadata 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 General Metadata page appears. From this page metadata, such as keywords, may be added
add IMS metadata	<b>IMS Metadata.</b> The Manage IMS metadata 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 Custom Metadata page appears.

## Manage General Metadata

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### 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

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### 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 Postgraduate, 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 Blackboard 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 Blackboard 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.
General Description	A general description for the item.

Field	Description
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 Blackboard Content System.
Technical Type	The type of requirement.
Technical Name	The name of the required item.
Technical Minimum Version	The lowest version of the required item.

Field	Description
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 Postgraduate, 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 Blackboard 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

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### 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>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.

## Adding Dynamic Metadata

---

### Overview

Instructors can add metadata to a Blackboard Content System item while adding the item to a Course. The Instructor can overwrite that metadata or maintain a connection to the Content Collection so that metadata is updated in the Course when it is updated in the Content Collection.

### Follow these steps

To add dynamic metadata to a Blackboard Content System item:

1. Select the item from the **Blackboard Content System** list.
2. Click **Submit and Add Metadata**.
3. Choose the metadata to add:

Metadata	Description
Checkbox	Click the appropriate checkbox to select all of the available attributes for that metadata type.
Metadata Picker	Click the plus sign to expand and select the appropriate metadata attributes. Click the minus sign icon to collapse the list.

4. Choose among the following options:

Option	Description
Values	Click the <b>Keep these values synchronized</b> checkbox to maintain a dynamic link between the Blackboard Content System and the Course for the item. <b>NOTE:</b> If this option is not selected, then the metadata is only copied to the Course. Any changes made to the item's metadata in the Blackboard Content System are not reflected in the Course and vice versa.
Format	Choose between a tabular or condensed format for the metadata. The <b>Sample Format</b> field displays how each option appears.

5. Click **Submit** when finished.

## 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.



**Note:** Standards, Objectives, and Goals must be designated as public in the Outcomes System before they can be aligned with Blackboard Content System items. See the Blackboard Content System User's Guide for more information on Standards, Objectives, and Goals. The attribute is named Standard, Objectives and Goals.

### 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 Add Attribute drop-down list and click Go.
Modify an existing attribute	<u>Modify</u> next to the appropriate attribute
Search for an attribute	The Search icon
Remove an attribute	<u>Remove</u> 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

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### 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 the Add Metadata Form to Add Item page checkbox to allow users to add metadata to items they add to the Blackboard Content System.
5. 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	<p>Choose a design element and click Go to add that element to the template:</p> <ul style="list-style-type: none"> <li>• Instructions. These instructions appear at the top of the page when creating a Metadata Template.</li> <li>• StepHeader. A graphical break in a template, which is used for logical grouping of data entry fields.</li> <li>• Field. An individual data field.</li> </ul>
Remove	Select design elements and click Remove 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 Modify to change the page instructions.
Step header:Details	Click Modify 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:

Select Field from the Add field on the Form Design page.

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.
External	Select a Read-Only status: All. View all attributes. Yes. View Read-Only attributes. No. View Read/Write attributes.

Function	Description
And	Select another criteria to view: Name. Search in the Name field. Description. Search in the Description field.
Contains/Starts with/Equal to	Choose Contains, Starts with, or Equal to, enter the text to view in the text box and click Go.
<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	Properties. The Properties page appears.
Modify the fields, labels, and organization of this form	Form Design. The Form Design page appears.
Modify the availability of this template	Availability. 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 Blackboard Content System users. Blackboard 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 Instructions from the Add drop-down list and click Go.
Add a step header to the existing metadata template	Select Step Header from the Add drop-down list and click Go.
Add individual fields to the existing metadata template	Select either Add New Field or Add Existing Field.
Remove individual fields from the existing metadata template	Click the check boxes next to the fields and click Remove.
Preview the existing metadata template	Click Preview. 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. TIP: 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: Drop-down produces a drop-down list of values from which only a single choice can be made. List Menu produces a static list of values from which one or more choices can be made. Radio Buttons produces a series of buttons from which only a single choice can be made.
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: Read/Write allows users of this metadata template to enter and modify the value of this field. Read-Only does not permit users to enter data into this field. Use the Required check box to make this field required.
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 Blackboard 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 All, Yes, or No.
Value Type	The type of attribute to search for.
External	The Read Only characteristic of the attribute. Search for All, Yes, or No.
And	Use these three fields for text searches: Name, ID, Description Contains, Starts with, Equals To Text to search for Click Go 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 locks 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

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### 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 (Undefined variable: BbVariables\_AS.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 Add User 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 Add User List 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 Modify Permissions 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.

 <p><b>Note</b></p>	<p><b>Note:</b> 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.</p>
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### 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
<p><b>Choose Users [r]</b></p>	<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>
<p><b>Set Permissions</b></p>	
<p><b>Permissions</b></p>	<p>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.</p>

## 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

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### 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 Manage Permissions for an Item.

### 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.

## Item Comments

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### 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

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### 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**.

 <b>Note</b>	<p><b>Note:</b> The Add Entry option is only available if categories have been added to the Learning Objects Catalog.</p>
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### Fields

The Add Catalog Entry page includes the following fields:

 <b>Note</b>	<p><b>Note:</b> 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.</p>
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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.

# Passes

## Overview

This section explains how Passes are used as a means of sharing an item or folder with a user who does not have access to the Content Collection.

## In this section

This section includes the following topics.

Topic	Description
<a href="#">Manage Passes</a>	Explains how Passes are a safe way to collaborate on projects with others outside the school on projects because access is specific and controlled.
<a href="#">Add Pass</a>	Describes how Passes are created from the Add Pass page.
<a href="#">Email Passes</a>	Explains how a pass may be shared with outside users through the Email Pass page.

## Manage Passes

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### 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 Add Pass 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 Email Pass 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

**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

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### 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. 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 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.

# Portfolios

## Overview

This section explains how 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.

## In this section

This section includes the following topics.

Topic	Description
<a href="#">About Portfolios</a>	Explains how Portfolios offer a means to demonstrate formative and/or summative progress and achievement.
<a href="#">Create a Personal Portfolio</a>	Describes how to create a Personal Portfolio; it can be a few simple pages displaying one or two pieces of content or a comprehensive record of achievement and performance over time.
<a href="#">Artifacts</a>	Explains how Artifacts are content that are used to demonstrate academic performance.
<a href="#">Manage Personal Portfolio</a>	Describes how users can manage the sharing, downloading, and comments for a Personal Portfolio from the Modify Portfolio page.
<a href="#">Share a Personal Portfolio</a>	Explains how a Personal Portfolio is private until the person who created it decides to share it with other users.
<a href="#">Review Portfolios</a>	Describes how Portfolios drafted by other users can be shared with other users to solicit feedback to help improve the Portfolio.

## About Portfolios

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### 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

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### 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

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### 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

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### 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

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### Overview

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 (Undefined variable: BbVariables\_AS.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

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 (Undefined variable: BbVariables\_AS.organization user 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 (Undefined variable: BbVariables\_AS.organization user id) is not known.

### Share with (Undefined variable: BbVariables\_AS.institution role)s

A Personal Portfolio is shared with users who have specific (Undefined variable: BbVariables\_AS.institution role)s through the Share with (Undefined variable: BbVariables\_AS.institution role)s page.

Follow these steps to open the Share with (Undefined variable: BbVariables\_AS.institution role)s 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 (Undefined variable: BbVariables\_AS.institution role)s** 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.

### 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.

### 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</b> [r]	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 Blackboard Learning System 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.

 <b>Note</b>	<p><b>Note:</b> 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.</p>
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## 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 [r]</b>	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 [r]</b>	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 Blackboard Learning System 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.
<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**

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### **Overview**

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**

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

### **Organize Received Portfolios**

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

# Basic Portfolios

## Overview

This section explains how 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.

## In this section

This section includes the following topics.

Topic	Description
<a href="#">Basic Portfolio Wizard</a>	Explains how the Basic Portfolio Wizard is the quickest and easiest method for creating a new Basic Portfolio.
<a href="#">Create a Personal Portfolio</a>	Describes how 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.
<a href="#">Basic Portfolio Contents</a>	Explains how the contents for a Basic Portfolio are controlled through the Modify Content page.
<a href="#">Manage Basic Portfolio</a>	Describes how users can manage the sharing, downloading, and comments for a Basic Portfolio from the Manage Basic Portfolio: Basic Portfolio Name page.
<a href="#">Share a Basic Portfolio</a>	Explains how Basic Portfolios can be shared with individual users or all the users in a Course or an Organization.

## Basic Portfolio Wizard

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### Overview

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

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

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

Field	Description
<b>Wizard Start</b>	
<p>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:</p> <p><b>Cancel:</b> Click to erase and end the Basic Portfolio, this will erase all information entered into the Basic Portfolio Wizard.</p> <p><b>Back:</b> Click to navigate to the previous page. This button does not appear on the first page of the wizard.</p> <p><b>Next:</b> Click to navigate to the next page. This button does not appear on the last page of the wizard.</p> <p><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.</p> <p>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.</p>	
<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>	
<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>	

Field	Description
<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.
<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

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### 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

The Add Basic Portfolio page includes the following fields.

Field	Description
<b>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 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 Manage Basic Portfolio Comments topic.

## Text Menu Style

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 My Portfolios 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

**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

**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

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### Overview

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

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> <sup>[r]</sup>	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> <sup>[r]</sup>	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

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### Overview

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.

	<b>Note:</b> Basic Portfolios must contain content to be downloaded; if a Basic Portfolio is empty the link to download will not appear.
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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

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### 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 (Undefined variable: BbVariables\_AS.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.

# 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 section

This section 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

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 Community 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

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

### Functions

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.
browse for Reusable Objects	select one of the following links to search for specific kinds of Reusable Objects: <ul style="list-style-type: none"> <li>• Assignments</li> <li>• Course Content</li> <li>• Discussion Board</li> <li>• Grade Center</li> <li>• Snippet</li> <li>• Portfolio Content</li> </ul> See <a href="#">Create a Reusable Object</a> for more information.

### 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 Institution's 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.

 <p>Note</p>	<p><b>Note:</b> If Blackboard Community 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.</p>
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### 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 Community 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.
filter by the status of the entries	the drop-down list in the <b>Status</b> field and select which entries to view. The following options are available: <b>Show All</b> – Displays all entries, including approved, pending and rejected <b>Pending</b> – Displays only entries that are pending <b>Approved</b> – Displays only entries that have been approved <b>Rejected</b> – Displays only entries that are rejected.

To . . .	click...
filter by catalog category	the drop-down list in the <b>Category</b> field and select which entries to view. By default, the filter shows all categories.

# Group Collaboration

## Introduction

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 section

This section includes the following topics.

Topic	Description
<a href="#">Create a Group Folder</a>	Create a folder that is shared with 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

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### About group folders

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.

## Locate a Group Folder

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### Locate a group folder

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

**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

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

## Collaborate on Documents

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### About group collaboration

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

### Versioning

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

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

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**

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**

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.

# Collaboration

## Introduction

All Blackboard Content System users can create workflows that define the tasks and order of execution of a specific process, including which documents and individuals are involved. Blackboard Content System users have the option to receive email notifications about the workflows they participate in such as when tasks are assigned to them, or when the workflow progresses from one milestone to the next.

## In this section

This section includes the following topics.

Topic	Description
<b>Collaboration</b>	
<a href="#">Collaboration Overview</a>	Explains how Workflows are deployed by using Models, that a Model serves as the foundation for a Workflow and how milestones and actions are the components of a Workflow Model.
<a href="#">Collaboration Splash Page</a>	Describes how the Collaboration splash page serves as the starting point for using Workflows.
<b>Creating Models</b>	
<a href="#">Working with Models</a>	Explains how Blackboard Content System users can build a Workflow Model that can be used many times.
<a href="#">Creating a Workflow Model</a>	Explains how Blackboard Content System users can create a workflow model that can be used and reused.
<a href="#">Adding Milestones</a>	Describes how Workflows are made up of Milestones that contain one or more Actions.
<a href="#">Adding Actions</a>	Describes how Actions are the individual tasks that make up the Workflow.
<a href="#">Adding Permissions</a>	Explains how Permissions are granted to the users involved in the actions at the beginning of a milestone and removed at the end of a milestone or if the workflow is stopped.
<a href="#">Modifying a Workflow Model</a>	Describes how a Workflow Model is created it can be modified by its owner.
<a href="#">Sharing Workflow Models</a>	Explains how Blackboard Content System users can share workflow models with other users. Users must have permission to share a workflow model based upon their (Undefined variable: BbVariables_AS.institution role).
<a href="#">Copying Workflow Models</a>	Describes how Blackboard Content System users can copy a workflow model they have created or one that has been shared with them.
<a href="#">Linking Items to a Workflow</a>	Explains how Blackboard Content System items or files from a local hard drive can be linked to a workflow instance.
<b>Deploying Workflows</b>	

Topic	Description
<a href="#"><u>Starting a Workflow</u></a>	Describes how Workflows can be started manually or automatically.
<a href="#"><u>Creating an Instant Workflow</u></a>	Explains how users can create an Instant Workflow, which is a seamless process of building a new workflow and executing it.
<a href="#"><u>Using a Shared Workflow Model</u></a>	Describes how users can start a workflow based upon a shared workflow model.
<a href="#"><u>Creating an Item-Based Workflow</u></a>	Explains how users can create a new workflow using a Blackboard Content System item as a starting point
<a href="#"><u>Modifying an Active Workflow</u></a>	Describes how Blackboard Content System users can modify any workflow that they own and that is in progress.
<b>Managing Workflow Actions</b>	
<a href="#"><u>About Workflows</u></a>	Explains how the Workflows page displays all of the workflows that a particular user is associated with, whether they are an initiator or a participant.
<a href="#"><u>Workflow Detail</u></a>	Explains how the Workflow Detail page provides a convenient display of the details of a particular workflow instance.
<a href="#"><u>To Do List: Actions</u></a>	Describes how the Actions page organizes and displays all of the actions associated with a particular user.
<a href="#"><u>Update Action</u></a>	Explains how the Update Action page lists all of the details and content items associated with a particular workflow action.
<a href="#"><u>Workflow Notifications</u></a>	Describes how the Workflow Notifications page allows users to manage the notifications from a particular workflow.
<a href="#"><u>Email Items</u></a>	Explains how users can send an email message to anyone with a valid email address from the Collaboration splash page.

## Collaboration Overview

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### Overview

All Blackboard Content System users can create workflows that define the tasks and order of execution of a specific process, including which documents and individuals are involved. Blackboard Content System users have the option to receive email notifications about the workflows they participate in such as when tasks are assigned to them, or when the workflow progresses from one milestone to the next.

Workflows are deployed by using Models. A Model serves as the foundation for a workflow: milestones and actions are pre-defined so a workflow can be deployed quickly and easily. A single model can have multiple workflow instances and can be shared with other Blackboard Content System users. Sharing these models with the appropriate roles within an Institution can increase efficiency and accuracy.

### Uses

Collaboration can assist Institutions in providing structure to common business processes. Some examples:

- Librarians can set up copyright authorization processes for Instructors and Students,
- IT departments can set up methods for requesting resources, and
- Institutions can establish procedures for requesting access to specific Course content.
- Students can use Collaboration to work together on class projects.

### See also

The following topics provide detailed information on workflow models:

- [Collaboration Splash Page](#)
- [Creating a Workflow Model](#)
- [Working with Models](#)
- [Modifying a Workflow Model](#)
- [Sharing Workflow Models](#)

## Collaboration Splash Page

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### Overview

The Collaboration splash page serves as the starting point for using workflows. The page is tailored to the specific user and displays their workflow models, workflows they are participating in, and actions assigned to them.

### Functions

The functions that are available on this page are described in the following table:

Function	Description
Get Started & Start an Instant Workflow	Click this link to display the Start Workflow page. Use an existing workflow model or start an Instant Workflow.
Check Progress & the workflows	Click either of these links to display the Workflows page.
Design Models & Create a new model	Click either of these links to display the Make a Request: My Models page.
To Do List	Click this link to display the <a href="#">To Do List: Actions</a> page.
Email	Click this link to send email to other workflow participants using the Email Items page.

## Working with Models

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### Overview

Any Blackboard Content System user can build a workflow model that can be used many times (instances). A workflow model is similar to a word processor template, where an instance is when a copy of the model is sent to users to complete. For each workflow there is one model, but there can be many instances.

### Functions

Workflow models are contained on the Make a Request: My Models page. This page is accessed in one of two ways:

- Click the **Make a Request** link from the Tools menu.
- Click the **Design Models** link from the Collaboration splash page.

The Make a Request: My Models page contains the following functions:

Function	Description
Add Model	Click to display the Add Workflow Model page and create a new model.
Remove	Click to remove selected workflows.
Copy	Click to copy selected workflows.
Display Models	Choose from the following options and click <b>Go</b> : My Models Shared Models
Name/Designer	Search for specific workflow models by the name or owner. Use the dropdown list and the text field to refine the search and click <b>Go</b> to execute the search.
Name	The name of the model.
Designer	The user who created the model.
Modify	Click to display the Modify Model page and change the properties of the model.
Start	Click the <b>Start</b> button to start the workflow.

### See also

The following topics provide detailed information on workflow models:

- [Creating a Workflow Model](#)
- [Modifying a Workflow Model](#)
- [Copying Workflow Models](#)

## Creating a Workflow Model

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### Overview

Any Blackboard Content System user can create a workflow model that can be used and reused. A workflow model is like a template, where an instance is when a “copy” of the model is sent to users to complete. For each workflow there is one model, but may be many instances. Workflow models can be shared with all Blackboard Content System users or to certain user roles in the system.

### Find this page

Click Add Model from on the Make a Request: My Models page and the Add Workflow Model page appears.

### Follow these steps

To create a new workflow model:

1. Enter a name for the model in the **Name** field.
2. Enter a description of the model in the **Instructions** field. These are instructions for using the workflow; for example, if this is a shared workflow this section may be used to explain how others should use this workflow. (This step is optional.)
3. Define the **Action Status** terms to be used in this model: **In Progress**, **Approved**, and **Not Approved**.
4. Click the **Browse...** button to link content items to this model.
5. Add permissions for the item. See [Adding Permissions](#) for more information.
6. Click **Submit** when finished. The Model Design page appears.
7. Click **Add Milestone**. The Add Milestone page appears.
8. Enter a name for the milestone in the **Name** field.
9. Enter a description of the milestone in the **Description** field. (This step is optional.)
10. Click either **No Action** or **Go to Milestone** and select a milestone number to define the Milestone to repeat if blocked. See [Adding Milestones](#) for more information.
11. Click the **Browse...** button to link content items to this milestone.
12. Add permissions for the item. See [Adding Permissions](#) for more information.
13. Click **Add Another File** to add another content item to this milestone.
14. Click **Submit** and **Add Action** to add an action to this milestone or **Submit** and **Finish** to return to the Model Design page. See [Adding Actions](#) for more information.



**Note:** A model is not complete and cannot be started until it includes at least one action.

**See also**

The following topics provide detailed information on creating workflow models:

- [Adding Actions](#)
- [Adding Milestones](#)
- [Adding Permissions](#)
- [Linking Items to a Workflow](#)

## Adding Milestones

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### Overview

Workflows are made up of Milestones that contain one or more Actions. Milestones provide structure to a complex workflow by grouping actions together in a logical fashion. Milestones can only be added by workflow owners.

### Find this page

From the Make a Request: My Models page:

1. Click the **Modify** button next to the appropriate workflow model.
2. Click **Model Design**.
3. Click **Add Milestone**. The Add Milestone page appears.

### Follow these steps

Follow these steps to add a milestone to a workflow:

1. Enter a name for the milestone in the **Name** field.
2. Enter a description for the milestone in the **Description** field. This step is optional.
3. Click either **No Action** or **Go to Milestone** and select a milestone number to determine the Milestone to repeat if blocked.

 <b>Note</b>	<p><b>Note:</b> The <b>Milestone to repeat if blocked</b> setting works as follows:</p> <p><b>No Action</b> is the default; the milestone continues. The workflow cannot proceed past this milestone because this action has failed, but other actions in the milestone can be completed.</p> <p><b>Go to Milestone</b> forces to workflow to return to a specified milestone if this milestone fails. If this milestone fails, all statuses forward from this point revert to <b>Not Started</b>. All comment and history information remains intact.</p>
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4. Click the Browse... button to link content items to this milestone.
5. Click Add Another File to add another content item to this milestone.
6. Add permissions to the item. See [Adding Permissions](#) for more information.
7. Click Submit and Add Action to add an action to this milestone or Submit and Finish to return to the Model Design page.

 <b>Note</b>	<p><b>Note:</b> See <a href="#">Adding Actions</a> for step-by-step instructions.</p>
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### See also

The following topics provide additional information on the use of milestones:

- [Creating a Workflow Model](#)

- [Modifying a Workflow Model](#)
- [Workflow Detail](#)
- [Adding Actions](#)
- [Adding Permissions](#)

## Adding Actions

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### Overview

Actions are the individual tasks that make up the workflow; they are located within workflow milestones. Actions are the method for assigning tasks to users and can be assigned to a single user or a group. Workflow designers can add actions to the workflow model when it is being designed or when it is in progress, provided that the action is added to a milestone that has not started.



**Note:** A model is not complete and cannot be started until it includes at least one action.

### Find this page

The Add Action page can be accessed in the following ways:

- After adding a milestone during the workflow creation process, click **Submit and Add Action**.
- Click the **Modify** button for the appropriate workflow on the Make a Request: My Models page. Click the **Model Design** link and then click the **Add Action** button for the appropriate milestone.

### Follow these steps

Follow these steps to add an action:

1. Enter a name in the **Name** field.
2. Enter a description of this action in the **Description** field. This step is optional.
3. Determine whether or not this action is required by clicking either the **Yes** or **No** radio button.
4. Determine a deadline by clicking the **Specify Date** radio button and use the date and time fields to choose a precise date and time for this deadline. If no deadline is required, click the **None** radio button.
5. Click **Browse** to assign a person to this action.
6. Click **Browse** to select a Course to associate with this action.
7. Assign this action to specific members of this Course:
  - Click the **All Course Members** radio button to assign the action to all Course members.
  - Click the **Selected Roles** radio button and select the roles from the following: Student, Guest, Teaching Assistant, Instructor, Course Builder, and Grader.
8. Determine how the action is approved, by any of the assignees or all of them:
  - Click the **Any Assignee May Approve** radio button or
  - Click the **All Assignees Must Approve** radio button.

9. Click the **Browse...** button to link content items to this action.



Note

**Note:** When documents are linked to a workflow at the workflow or milestone level, they appear at the action level on the start workflow page when a workflow is started.

10. Click **Submit** to finish the action and return to the Model Design page.

## Adding Permissions

### Overview

Permissions to workflow items are granted to the users involved in the actions at the beginning of a milestone and removed at the end of a milestone or if the workflow is stopped; these workflow permissions also appear on the permissions page for the item. Permissions may be selected when an item is added to the model and they can also be modified in the instance.

Permissions function within workflows as follows:

- Permissions to items are granted when the workflow enters the milestone in which the action exists,
- Permissions to items are removed when the workflow exits the milestone in which the action exists,
- Permissions to items are removed when a workflow is stopped, and
- Permissions to items are granted when a workflow is restarted (after being stopped).



**Note:** If no permissions are added to an item then a warning appears when the workflow is submitted stating that there are no permissions for an item and asking the user if they would like to continue.

### Find this page

From the Add Workflow Model page, click **Browse** to add an item to the model. The item appears in a table with four checkboxes; one for each permission that can be added.

### Follow these steps

To add permissions to an item:

1. Add an item to the workflow. See *Creating a Workflow Model* for more information.
2. Select any or all of the following permissions by clicking its checkbox:

Permission	Description
Read	Allows a user to read or view this item.
Write	Allows a user to edit this item.
Delete	Allows a user to delete this item from the workflow.
Manage	Allows a user to manage the permissions for the item.

3. Click **Submit** when finished.

## Modifying a Workflow Model

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### Overview

Once a workflow model is created it can be modified by its owner. These modifications affect the original model and any shared instances of that workflow model. Existing instances of the workflow are not affected by these modifications.

Workflow models that are in progress can be modified but only after they are stopped. Once stopped, the owner can modify any milestone that has not been started and any associated actions.

### Find this page

To open the Modify Workflow Model page:

1. Open the Make a Request: My Models page.
2. Click the **Modify** button that corresponds to the appropriate model.

### Functions

The Modify Workflow Model page contains the following links:

Link	Description
Properties	Click this link to open the <a href="#">Model Properties</a> page; the name, description, and status labels of a model can be modified there.
Design	Click this link to open the <a href="#">Model Design</a> page; milestones and actions may be added or removed.
Sharing	Click this link to open the <a href="#">Workflow Sharing</a> page; the settings for sharing the model are located there.

## Sharing Workflow Models

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### Overview

Certain Blackboard Content System users can share workflow models with other users. Users must have permission to share a workflow model based upon their (Undefined variable: BbVariables\_AS.institution role).

### Find this page

Click the **Model Sharing** link on the Modify Model page.

### Follow these steps

Follow these steps to share a workflow with other Blackboard Content System users:

1. Click the **Yes** radio button to share the workflow.
2. Choose how many roles that can use this workflow:
  - Click the **Everyone** radio button to share this workflow with every user role.
  - Click the **Selected Roles** radio button to share this workflow with specific user roles.
3. Select a role and click the **Right Arrow** button to move it to the **Selected Roles** list. To remove a role from the **Selected Roles** list, select a role and click the **Left Arrow** to move it back to the **Roles to Select** list.
4. Click **Submit** when finished.

### Removing Shared Workflows

Removing a shared workflow prevents the users it was shared with from creating another workflow, but it does not impact workflows that are already in progress.

To remove a shared workflow:

1. Navigate to the Modify Model page.
2. Click the **Model Sharing** link.
3. Click the **No** radio button to remove the workflow share.

#### OR

4. Click the **Selected Roles** radio button and select the roles to share this model.
5. Click **Submit** when finished.

### See also

The following topics provide additional information on sharing workflows:

- [Using a Shared Workflow](#)

## Copying Workflow Models

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### Overview

Blackboard Content System users can copy a workflow model they have created or one that has been shared with them. This is another method of quickly starting a workflow. Once the workflow model has been copied, the user can modify it accordingly.



Note

**Note:** If a user copies a shared workflow model they become the owner, meaning they can modify the model and reuse it, even if the original is removed from the system or is unshared with them.

### Follow these steps

To copy a workflow model:

1. Navigate to the Make a Request: My Models page.
2. Select the workflow model to copy.
3. Click **Copy**. The copy of the workflow model appears on the list.

## Linking Items to a Workflow

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### Overview

Blackboard Content System items or files from a local hard drive can be linked to a workflow instance. Blackboard Content System Items or local files may be linked at the model, milestone and action level of a workflow. When linked at the model level they cascade to all actions in model; when linked at milestone level they cascade to all actions in milestone. They appear in the model at the place linked, but in a workflow instance they all appear at the action level.

Items can be added to a workflow in progress, but the following restrictions must be followed:

- the workflow must be stopped and
- the item can only be added to milestones or actions that have not started yet.



**Note:** Items added to workflows already in progress are only applicable to that particular instance.

### Find this page

Items can be linked at the model, milestone and action level of a workflow. Navigate to the Add Workflow Model, Add Milestone or Add Action page.

### Follow these steps

From the Add Workflow Model, Add Milestone, or Add Action pages, follow these steps:

1. Click the **Browse...** button.
2. To add a Blackboard Content System item:
  - Use the **My Content**, **Course Content**, and **Institution Content** links to navigate to the appropriate folder.
  - Select the item from the list by clicking its radio button.
  - Click **Submit** when finished.

**OR**

3. To add a local file:
  - Click the **Add Item** button. The Add Item page is displayed.
  - Click the **Browse...** button.
  - Use the File Upload dialog box to locate the local file and then click **Open**.
  - Select the options for this file by clicking the appropriate checkboxes.
  - Click **Submit** when finished.
4. Add permissions for the item. See Adding Permissions for more information.

## Starting a Workflow

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### Overview

Workflows can be deployed manually or automatically. Here are the three ways to manually start a workflow:

- Create an Instant Workflow (a new workflow model and instance from scratch).
- Start a workflow from a list of workflow models (shared or user-created).
- Select a Blackboard Content System item and build a workflow model around it or use an already existing workflow model.

### Find this page

For each method of starting a workflow, follow these steps:

- Instant Workflow: From the Collaboration splash page, click on either one of the following links: the **Get Started** or **Start an Instant Workflow**.
- Shared Workflow: Click the name of the workflow in the **Get Started** list..
- Item-Based Workflow: From any Content Collection folder page, select an item, choose **Start Workflow** from the drop-down list and click **Go**.

### See also

The following topics provide detailed information on starting workflows:

- [Creating an Instant Workflow](#)
- [Using a Shared Workflow Model](#)
- [Creating an Item-Based Workflow](#)

## Creating an Instant Workflow

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### Overview

Users can create an Instant Workflow, which leads the user through a seamless process of building a new workflow and executing it.

### Find this page

From the Collaboration splash page, click on either one of the following links: the **Get Started** or **Start an Instant Workflow**. The Start Workflow page appears.

### Follow these steps

Follow these steps to create a new workflow:

1. Click the **Create Instant workflow** radio button.
2. Enter a name for the new workflow in the **Name** field.
3. Enter instructions of the new workflow in the **Instructions** field. These are instructions for using the workflow; for example, if this is a shared workflow this section may be used to explain how others should use this workflow. This step is optional.
4. Define the **Activity Status** terms to be used in this workflow: **In Progress**, **Approved**, and **Not Approved**.
5. Click the **Browse...** button to link content items to this workflow.
6. Click **Submit**.

### See also

The following topics provide additional information on creating workflows:

- [Adding Milestones](#)
- [Adding Actions](#)
- [Adding Permissions](#)

## Using a Shared Workflow Model

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### Overview

Users can start a workflow based upon a shared workflow model.

### Find this page

From the Collaboration splash page, click the link to a workflow in Get Started or select Make a Request in the Workflow menu.

### Follow these steps

Follow these steps to start a new workflow based upon a Shared Workflow:

1. Navigate to the Make a Request: My Models page.
2. Click the **Start** button belonging to the appropriate workflow model listed on the page.
3. Enter additional comments regarding the workflow in the **Comments** field. This step is optional.
4. Use the **Browse...** button to add an item to this workflow. See Linking Items to a Workflow for more information.
5. Expand each milestone listing to assign deadlines and Content Items. (Optional)
  - Assign a deadline for the milestone by clicking the **Specify Date** radio button and using the **date** and **time** fields.
  - Use the **Browse...** button to add an item to this workflow. See Linking Items to a Workflow for more information.
6. Click Send me email when complete to receive an email when the workflow has finished.
7. Choose when to start this workflow using one of the following options:
  - Click the **Start Manually** radio button to begin this workflow at your discretion.
  - Click the **Start Now** radio button to begin this workflow as soon as possible.
  - Click the **Specify Start Date** radio button and use the date and time fields to choose a precise date and time to begin this workflow.
8. Click **Submit** when finished.

### See also

The following topics provide additional information on using shared workflows:

- [Adding Milestones](#)
- [Adding Actions](#)
- [Adding Permissions](#)

## Creating an Item-Based Workflow

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### Overview

Users can create a new workflow using a Blackboard Content System item as a starting point. This method insures that a particular item is included in the workflow.

### Find this page

From any Content Collection folder page, select an item, choose **Start Workflow** from the drop-down list and click **Go**.

### Follow these steps

Follow these steps to create a new workflow based upon a Blackboard Content System item:

1. Choose to create an Instant Workflow or use an existing workflow model.
  - For an Instant Workflow follow the steps presented in [Creating an Instant Workflow](#).
  - For a Workflow Model follow the steps presented in [Using a Shared Workflow Model](#).
2. Click **Submit** when finished.

### See also

The following topics provide additional information on creating item-based workflows:

- [Adding Milestones](#)
- [Adding Actions](#)
- [Adding Permissions](#)

## Modifying an Active Workflow

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### Overview

Blackboard Content System users can modify any workflow that they own and that is in progress. Milestones and Actions that have not started yet can be modified. Milestones and Actions that are in progress or are already completed may not be modified.

### Find this page

From the My Workflows page, click **Modify** next to the appropriate workflow.



**Note:** The system must stop the workflow before it can be modified; a message appears with this warning. Click **OK** to stop the workflow.

### Functions

The Modify Workflow page contains the following link:

Link	Description
Design	Click this link to open the Workflow Model Design page.

### Follow these steps

To modify an active workflow:

1. Select a workflow and click **Modify**. The Modify Workflow page appears.
2. Click **Design** to change the milestones and actions of the workflow. See [Adding Milestones](#) and [Adding Actions](#) for more information.
3. Click **Submit** when finished.

### See also

The following topics provide additional information:

- [Adding Milestones](#)
- [Adding Actions](#)
- [Adding Permissions](#)

## About Workflows

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### Overview

The Workflows page displays all of the workflows that a particular user is associated with, whether they are an initiator or a participant. Users can manage their workflow subscriptions, modify, start or stop workflows that they have created, view workflow details, and add comments to workflows from this page.



**Note:** If a user is participating in a workflow that has been scheduled – but has not reached them yet – then they cannot access the workflow details.

### Find this page

The Workflows page can be accessed in the following ways:

- Click **Check Progress** from the Workflows menu.
- Click **Check Progress** or the **Workflows** link from the Collaboration splash page.

### Functions

The Workflows page has the following functions:

Function	Description
Remove	Users can remove workflow instances that they have created.
Subscribe	Click to subscribe to selected workflows; the Workflow Notifications page appears.
Display Workflows	Choose from the following display options and click <b>Go</b> : <b>All:</b> Displays all workflows that are associated with a user. <b>Sent:</b> Displays workflows that were initiated by the user. <b>Received:</b> Displays workflows that the user is involved with but were initiated by other users. <b>Scheduled:</b> Displays workflows that a user has not started yet or workflows that a user is participating in that have begun but have not yet reached the milestone with their assigned actions. <b>In Progress:</b> Displays workflows that are in progress. <b>Complete:</b> Displays workflows that are completed.
Name	Displays the name of the workflow.
Status Icon	One of the following icons may be displayed next to the Workflow Name: Indicates that a workflow Milestone is overdue. Indicates a subscription to all notifications for that workflow. Indicates a subscription to Activity notifications for that workflow.
Progress	Displays the progress of the workflow.

Function	Description
Current Milestone Deadline	Displays the deadline of the current milestone of a particular workflow.
Start Date	Displays the date that the particular workflow began.
Stop Date	Displays the date that the particular workflow was stopped.
Type	Displays the type of workflow: <b>Sent</b> or <b>Received</b> .
Status	Displays the <b>Start/Stop</b> button. Users can click <b>Start</b> to begin a workflow instance they have created and <b>Stop</b> to stop it. Workflow instances that have been stopped may be restarted by clicking <b>Start</b> .
Modify	Click to display the Workflow Design page for this particular workflow. See <a href="#">Modifying an Active Workflow</a> for more information.
Details	Click <b>Details</b> to display the Workflow Detail page for that workflow.
Select	Choose one of the following selection options: <b>Select All</b> , <b>Unselect All</b> , or <b>Invert Selection</b> and click <b>Go</b> .
Items per page	Choose how many workflows to display on this page: <b>25</b> , <b>50</b> , <b>100</b> , <b>200</b> , or <b>ALL</b> and click <b>Go</b> .

## Workflow Detail

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### Overview

The Workflow Detail page provides a convenient display of the details of a particular workflow instance. Each milestone of this workflow is listed on this page in a collapsed view; the view can be expanded to display detailed information for the actions that make up the milestone. Workflow participants can update actions within the milestone and add comments.

Workflow Owners have two overrides at their disposal: they can override an action to complete or fail it. For example: Joe is assigned an action in Milestone 1 and is sick, rendering him unable to complete the action. The owner of the workflow can use the Approve Action function to move the workflow on to the next milestone.

### Find this page

To find the Workflow Detail page:

- Click the **Details** button next to the appropriate workflow on the Workflows page.
- Click the **Details** button next to the appropriate action on the Actions page.

### Functions

The Workflow Detail page contains the following functions:

Function	Description
Milestone Expand/Contract	Click the plus/minus icon to expand and contract the details for that milestone.
Content Items	Each of the content items that are associated with a milestone may be accessed by clicking the link.
<b>Override Options</b>	
Approve Action	Click this button to approve this action and move the workflow on to the next milestone.
Fail Action	Click this button to fail this action.
<b>Status History</b>	
Update Action	Click this button to display the Update Action page.
Comments	Click this button to add comments to this action.
Expand All	Click this button to display the text for each comment in the field below.
Collapse All	Click this button to collapse the text for each comment in the field below.

## To Do List: Actions

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### Overview

The Actions page organizes and displays all of the actions associated with a particular user.



**Note:** Once an action is completed it is automatically removed from the Actions page by the system. The user may still access this workflow (and action) from the My Workflows page.

### Find this page

The Actions page can be accessed in the following ways:

- Click **To Do List** from the Collaboration menu.
- Click **To Do List** from the Collaboration splash page.

### Functions

The Actions page contains the following functions:

Function	Description
Display Actions	Choose from the following display options and click <b>Go</b> : Types: <b>All Workflows:</b> Displays actions from all workflows that are associated with a user. <b>Current Workflows:</b> Displays actions from workflows that are in progress. <b>Scheduled Workflows:</b> Displays actions from upcoming workflows. Status: <b>Not Started:</b> Displays actions that a user has not started. <b>In Progress:</b> Displays actions that are in progress. <b>Complete:</b> Displays actions that are completed.
Status Icon	Icons displayed in this column indicate that an action deadline is overdue or that an action is required.
Action Name	Displays the name of the action.
Action Status	Displays the status for the action.
Action Deadline	Displays the deadline for the action.
Workflow Name	Displays the name of the workflow associated with this action.
Update	Click <b>Update</b> to display the Update Action page.
Details	Click to view the details of the workflow.

## Update Action

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### Overview

The Update Action page lists all of the details and content items associated with a particular workflow action. The status of the action can be changed and comments may be added.

The workflow owner can override an action to complete or fail it entirely. For example: Joe is assigned an action in Milestone 1 and is out sick. The owner can use the Override Complete function to move the workflow to the next stage. This is available to the owner on the Workflow Detail page.



**Note:** Any user involved in the workflow can add comments to actions while only users assigned to an action can update the status for that particular action. For example: if one user is assigned an action in Milestone 1, that user can go into the workflow during Milestone 2 and add comments to actions in milestone 2.

### Find this page

The Update Action page can be accessed in the following ways:

- Click **Update** for the appropriate action on the Actions page.
- Click **Update Action** for the appropriate action on the Workflow Detail page.

### Functions

The Update Action page contains the following functions:

Function	Description
Instructions	Displays the instructions for this action. Read only.
Deadline	Displays the deadline for this action. Read only.
Required	Displays the <b>Required/Not Required</b> status of the action. Read only.
Content Items	Displays the links to any Content Items associated with this action.
Status	Choose from the following options to change the status of this action: <ul style="list-style-type: none"> <li>• In Progress</li> <li>• Approved</li> <li>• Not Approved</li> </ul>
Subject	Enter a subject in the field provided.
Comment	Enter a comment related to the change in status.
Status History	Displays the status history of this action. Use the <b>Expand All</b> and <b>Collapse All</b> buttons to expand or collapse the history data.

## Workflow Notifications

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### Overview

The Workflow Notifications page allows users to manage the notifications from a particular workflow. The following options are available:

- **Actions are ready to be completed:** the user only receives notifications regarding the status of milestones within the workflow in which the user has actions to complete, not the overall status of the workflow.
- **These events occur:** the user receives all notifications from a workflow, including action and milestone status.
- **Never:** the user receives no workflow notifications.

### Find this page

The Workflow Notifications page can be accessed by selecting a workflow from the My Workflows page and clicking **Subscribe**. Users can modify the notification settings for one or more workflows at the same time.

### Subscribe to workflow

Follow these steps to set notification preferences:

1. Select one of the following options: **Actions are ready to be completed**, **These events occur**, or **Never**.
2. Click **Submit**.

### Opt-Out of Workflow Notifications

Blackboard Content System users can also opt out of all workflow notifications by using the Personal Settings under the Tools menu.

1. Click **Personal Settings** under the Tools menu.
2. Click the **Opt out of Workflow Notifications** checkbox.
3. Click **Submit** when finished.

## Email Items

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### Overview

Users can send an email message to anyone with a valid email address from the Collaboration splash page.

### Find this page

Click the **Email** link on the Collaboration splash page.

### Follow these steps

Follow these steps to send an email:

1. Enter an email address in the **To** field.
2. Enter any email addresses in the **Cc** and **Bcc** fields. Optional.
3. Enter a subject in the **Subject** field.
4. Enter the message in the **Message** field.
5. Click **Submit**.