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About the Content Collection

If your school licenses content management, you will have access to the Content Collection.

These topics apply to all end-users of the Content Collection and content management including Students, Instructors, librarians, and other members of an educational community.

Content management allows users to manage learning content, digital assets, and ePortfolios in an enterprise learning environment.

If the Content Collection is available, a Content Collection tab will appear in the Blackboard Learn user interface.
Navigating the Content Collection

If your school licenses content management, the Content Collection appears as part of Blackboard Learn. If you can log in to Blackboard Learn and your school licenses content management, you can access the Content Collection.

After logging into Blackboard Learn, select the Content Collection tab at the top of your application. Keep in mind that the administrator may restrict access to the Content Collection or give the tab a different name. If you have difficulty finding the Content Collection after logging in, please contact the Blackboard administrator at your Institution for assistance.

Content Collection Menus

The menus are located in the left hand sidebar and include the Content Collection, Jump To, and Search Content menus.

The Content Frame

The content frame occupies most of the screen to display the current view. 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. The content frame includes the Breadcrumb Trail, Action Bar, and Content Frame.

Content Areas

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. There are three default content areas: My Content, Course Content, and Institution Content.

Personal Homepage

The Personal Settings page allows you to select an entry point into the Content Collection that best meets your needs. If you access the same Course in the Content Collection every time you open the tab, set the Home Page to point to that Course folder in the Content Collection for quick access.

Go to Location

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

The Content Collection menu can be viewed two different ways. These views are represented by icons at the top of the panel. The shortcut view appears initially by default. The system will save your view preference and return you to this view each time you enter the Content Collection. You may drag the right-side of the frame to adjust the size of Content Collection menu.

The shortcut view includes buttons to open each content area and bookmarks. The folder view shows each content area with a nested folder structure with the ability to expand or close each folder to view the sub-folders.

*Note:* The administrator may override the user’s ability to switch navigation views.

![Content Collection Menu](image)

Shortcut and Folder View of the Content Collection Menu

Jump To Menu

The Jump To menu provides access to Portfolios, Collaboration tools, Learning Objects, and other Tools to use within the Content Collection. Each sub menu is collapsible so that you can see only what you need to at the time. Clicking the heading of a Jump To menu item will open the tool in the content frame of your application.
Navigating the Content Collection

Search Content Menu

The Search Content menu contains all searches pertaining to the Content Collection.

<table>
<thead>
<tr>
<th>Type of Search</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Search</td>
<td>Within the Basic Search you can search terms within metadata and file or folder names.</td>
</tr>
<tr>
<td>Advanced Search</td>
<td>The Advanced Search contains more options to search on username, dates, file size and more specific metadata.</td>
</tr>
<tr>
<td>Portfolio Search</td>
<td>The Portfolio Search is used to search only portfolios created in Blackboard Learn. Your search will only return portfolios that have been set to available or have been shared with you.</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>Saved Searches include any search that you have saved after it has been run. For example, you searched for a biology article that your instructor made available and you want to be able to find it again. Once you complete the search you can click Save Search in the Action Bar and name the search so that you can easily find the article again.</td>
</tr>
</tbody>
</table>

Breadcrumb Trail

The Breadcrumb trail appears at the top of the Content Frame. It is a hierarchical trail that shows where in the
Navigating the Content Collection

Content Collection the user is located and how they got there. Click each item in the trail to proceed to that folder. Breadcrumb drop-down buttons act as hierarchy folder separators. Click the Breadcrumb drop-down button to view a list of options for that folder.

Action Bar

The Action Bar appears below the Breadcrumb Trail. It includes buttons to perform actions specific to that page. Different options will be available based on your system settings or privileges.

Content Frame

The content frame displays the area of the content collection you are working in, for example: viewing Content Collection folders or items. When displaying the contents of the folder, users can sort the folders and items by clicking the column titles.
Content 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.

### 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 that you have added to the Content Collection.

*Note:* You must use the Search feature to find and view content items or folders that have been shared with you. You 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 you to see the 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, this is a powerful and intuitive way to share and distribute library materials.

Set Your Personal Homepage

Any Content Collection or bookmarked location can be set as your entry point.

How to Select a Personalized Home Page

1. Access the Content Collection.
2. On the Jump To... menu, under Tools, click Personal Settings.
4. Browse to search for and insert a location.
5. Click Submit.
# How to Use Go To Location

Set a location and make a bookmark at the same time.

1. On the **Jump To...** menu, under **Tools**, click **Go to Location**.
2. **Browse** to enter a **Location**.
3. Type a **Name** to create a Bookmark.
4. Click **Submit**.

## Go to Location

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Enter Location</strong>&lt;br&gt;<strong>Location</strong>&lt;br&gt;Locations are case sensitive.</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Add Bookmark</strong>&lt;br&gt;<strong>Name</strong></td>
</tr>
<tr>
<td>3.</td>
<td><strong>Submit</strong>&lt;br&gt;<strong>Cancel</strong>&lt;br&gt;<strong>Submit</strong></td>
</tr>
</tbody>
</table>
Bookmarks

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.

How to Find this page

Select Bookmarks on the Content Collection menu from the shortcut view.

The Bookmarks page includes the following functions.

<table>
<thead>
<tr>
<th>To ...</th>
<th>click ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>add a Bookmark</td>
<td>Create Bookmark in the Action Bar. The Create Bookmark page appears.</td>
</tr>
<tr>
<td>delete a Bookmark</td>
<td>Delete after selecting the check boxes for the Bookmarks to be deleted. If a Bookmark is mistakenly deleted, it must be recreated from the Add Bookmark page.</td>
</tr>
<tr>
<td>follow a Bookmark</td>
<td>the Bookmark title. The folder the Bookmark is linked to opens.</td>
</tr>
<tr>
<td>add a Bookmark folder</td>
<td>Create Bookmark Folder. The Create Bookmark Folder page appears. From this page, enter a name for the folder and click Submit.</td>
</tr>
<tr>
<td>change a Bookmark</td>
<td>Edit from the contextual menu. The Edit Bookmark page appears. The user may change the link or name of the Bookmark from this page.</td>
</tr>
<tr>
<td>edit the item the Bookmark is pointing to</td>
<td>Edit from the contextual menu. The Edit 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.</td>
</tr>
<tr>
<td>move the Bookmark</td>
<td>select the Bookmark and click Move. The Move Bookmarks page appears. The user may change the destination folder for the Bookmark.</td>
</tr>
</tbody>
</table>

Invalid Bookmarks

When an item that has been added as a Bookmark is deleted 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 Delete option may be used to delete invalid Bookmarks from the Bookmarks page.

Adding Bookmarks

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 as well as a content area. After a Bookmark is added, it appears on the Bookmarks page.

**How to Add a Bookmark**

1. From a content area, select the check box of the file or folder to be bookmarked.
2. Click **Bookmark Items**.
3. Type a name for the Bookmark. The location is already identified.
e-Reserves

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 edit 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 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. Instructors may read e-Reserve content, but they cannot edit it in any way or remove it.

Creating e-Reserve Course Folders

e-Reserves contain specific folders for Courses in the system. The 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: If the librarian is enrolled in the Course, course folders appear automatically in the librarian’s e-Reserve area.
Content Creation and Management

Creating and Editing Content

Creating Reusable Content

Content created throughout Blackboard Learn is stored in the Content Collection.

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>Folders are storage bins for other folders and items. Folders can be created within any folder. To create a folder you must have Read and Write privileges for the folder that will contain the new folder.</td>
</tr>
<tr>
<td>Items</td>
<td>Items can be created or uploaded and are stored in the Content Collection. Items can be added to any folder provided that you have Manage privileges in the folder that will hold the new item.</td>
</tr>
<tr>
<td>External Links</td>
<td>Links to outside websites may be added to the Content Collection as External Links. Once created, the website URL for the External Link can be edited.</td>
</tr>
</tbody>
</table>

Content that is built within the Content Collection, like External Links or HTML Objects can be used in specific places within your courses.

Example:

If you are taking similar classes for your area of study and you found an article online that you want to share in Discussion Boards in different courses, you can create an External Link in the Content Collection and link to the item within the Text Editor of the tool in your course. You can also link content that you create in blogs, wikis, and journals.

Editing Content

All folders, items, and links can be edited by opening the contextual menu next to the content item and selecting Edit.

Locking Folders

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 deleted 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 deleted. If a folder is locked, the user will also be unable to edit items within it through the Web Folder, for example, copying an item directly into the Web Folder.

Note: On the Mac, a Web Folder is called a Shared Location.
Content Creation and Management > Creating and Editing Content

Access this option by opening the contextual menu and clicking Edit. Lock Options are available in section three.

3. Lock Options

<table>
<thead>
<tr>
<th>Lock</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Locks</td>
</tr>
<tr>
<td>Lock this folder</td>
</tr>
<tr>
<td>Lock this folder and everything it contains</td>
</tr>
</tbody>
</table>

How to Create a Folder

1. Access the Content Collection.
2. Navigate to the Content Area or folder that will contain the new folder.
3. On the Action Bar, click Create Folder. If the Create Folder function does not appear, you do not have permission to add a folder in the current location.
4. Type a name for the Folder in the field that opens below the Action Bar.
5. Click Create and Customize to set options for the folder or click Submit to complete the action.
6. If you selected Create and Customize, the Edit Folder page opens. Select any of the available options to customize your folder and click Submit.

How to Create an Item or External Link

1. Access the Content Collection where you want to add an item.
2. On the Action Bar, point to Build, and select the item to add.
   -OR-
   If you are creating an External Link, you can simply click Link.
   
   Note: If the Build function does not appear, you do not have permission to add an item in the current location.
3. Provide a **Name** for the item. If you select the check box, the system will automatically overwrite an existing file with the same name.

4. Use the Text Editor to create the content for the item.
   - **OR**

   If you are creating an External Link, provide a **Link Name** and the **URL**.

   **Note:** Do not use the ‘%’ and the ‘?’ characters in this field.

5. Select one or more of the following options:
   - **Lock File**: An item can be unlocked only by the person who locks it. A lock prevents changes to the item. If a file is checked out, it is locked automatically.
   - **Share Comments**: If comments are shared, users with Read permission may view and add comments.
   - **Enable Versioning**: If Versioning is enabled, overwriting or editing a file will create a new version.
   - **Enable Tracking**: If Tracking is enabled, each instance that a user interacts with an item is recorded.

6. Click **Submit**. The item is added to the Content Collection.
Copying and Moving Content

**Copying** an item or a folder creates an exact replica of that item or folder. The item or folder can be copied to the same location or a new 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 (file name)” followed by the file or folder name.

If the name of the copied item or folder matches the name of an item or folder in the destination location, the Content Collection will prompt the user to confirm an overwrite.

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 they will start the Course with the same content.

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

Permissions

The following table labels which permission is necessary for each action. To learn more about Permissions see [Granting Permissions](#).

<table>
<thead>
<tr>
<th>Permission Needed</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read</td>
<td>Copy and Move</td>
</tr>
<tr>
<td>Write</td>
<td>Copy and Move</td>
</tr>
<tr>
<td>Delete</td>
<td>Move</td>
</tr>
</tbody>
</table>

**How to Copy a Content Item or Folder**

1. Navigate to the folder that holds the item or folder to be copied.
2. Select the check box next to the item or folder (or multiple items and folders) to be copied.
3. Click **Copy**.
4. 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 **Browse** to locate and select the destination folder.
5. 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.
6. Click **Submit**.
**How to Move an Item or Folder**

1. Navigate to the folder that holds the item or folder to be moved.
2. Select the check boxes next to the item or folder (or multiple items and folders) to be moved.
3. Click **Move**.

4. Type the path to the destination folder to store the item or folder or click **Browse** to locate and select a folder.
5. 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.
6. Click **Submit**.
Uploading and Downloading Packages and Items

Upload any documents, photos, folders, and work to the Content Collection. You can use your My Content area for your personal use to store files that you work on or want to submit or attach to any coursework. Files stored in the Content Collection can be linked to in your courses or stored for projects you may be working on.

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

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

Users can **Download** items and 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.

### How to Upload Items

Files can be uploaded to any content area where you have permission to do so. The Upload button will appear in the Action Bar with the options to **Upload Files** or **Upload Package**. Packages are ZIP files that will be unpackaged into the folder you selected.

1. Access the Content Collection where you want to upload files.
2. On the Action Bar, point to **Upload** and select **Upload Files**.

<table>
<thead>
<tr>
<th>Move/Users/owensc/Nonverbal Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Indicates a required field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1. <strong>Content Information</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Nonverbal Communication</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. <strong>Destination</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination</strong></td>
</tr>
<tr>
<td>5. If selected, the system automatically overwrites the existing file with the same name.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. <strong>Submit</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Submit</strong></td>
</tr>
</tbody>
</table>
3. If you are uploading multiple files, use the **Multiple Files and Folders** option available from the top right of the page. You can **Browse** for files or drag and drop files from folders on your desktop.

4. After adding files to the list, click **Submit** to upload the files. If an upload fails, click **Undo** to remove all uploaded files and return to the parent folder. Uploading multiple files and folders requires the Java plugin, version 1.5 or later. If the plugin is not available, use the **Single File** option to add files one at a time.
1. Navigate to the folder where the items are located.
2. Select the files and folders to download.
3. Click Download Package.

4. Select Save File 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. Keep in mind the following when editing the files:

- 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.
Managing Items

All the options to manage any file in the Content Collection are accessed from the contextual menu. Once you have organized your items, and moved them or copied them into the appropriate folders, you can manage other features offered in the Content Collection. Options are available to Edit Properties, turn on Tracking and Versioning, or view Comments. You can also look at a 360 View of your files to see everything about your file at a glance. A lot of these will help if you are sharing content with classmates or need to track edits on a file.

Edit Item Properties

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 edited.

1. Navigate to the folder that contains the item to be edited.
2. Select Edit from the contextual menu for the item to be edited.
3. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name [r]</td>
<td>View or change the name of the file. Changing the name of a file will break any links to the file, including passes.</td>
</tr>
<tr>
<td>Web Folder/Shared Location URL</td>
<td>The web link for this file that includes its full location path. <strong>Note:</strong> On the Mac, a Web Folder is called a Shared Location.</td>
</tr>
<tr>
<td>Permanent URL</td>
<td>The web link for this file that includes the unique, immutable identifier for it but not its location path. These persistent identifiers mean that links to Content Collection items no longer break.</td>
</tr>
<tr>
<td>File Type</td>
<td>Displays the type of file.</td>
</tr>
<tr>
<td>File Size</td>
<td>Displays the size of the file, in KB.</td>
</tr>
<tr>
<td>Owner</td>
<td>Displays the Username of the person responsible for the maintaining the item.</td>
</tr>
<tr>
<td>Created By</td>
<td>Displays the Username of the person who created the item.</td>
</tr>
<tr>
<td>Created On</td>
<td>Displays the day, date, and time the item was created.</td>
</tr>
<tr>
<td>Last Edited By</td>
<td>Displays the Username of the person who last made changes to the item.</td>
</tr>
<tr>
<td>Last Edited</td>
<td>Displays the latest day, date, and time that changes were made to the item.</td>
</tr>
<tr>
<td>Options</td>
<td></td>
</tr>
<tr>
<td>Lock File</td>
<td>Enable or disable file locking.</td>
</tr>
<tr>
<td>Share Comments</td>
<td>Enable or disable comment sharing.</td>
</tr>
<tr>
<td>Enable Versioning</td>
<td>Enable or disable versions.</td>
</tr>
<tr>
<td>Enable Tracking</td>
<td>Enable or disable tracking.</td>
</tr>
</tbody>
</table>

4. Click **Submit**.

Manage Item Comments

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.

How to Work with Item Comments

1. Navigate to the folder that contains the item.
2. Select **Comments** from the contextual menu for the item.

The following options are available on the Comments page:
<table>
<thead>
<tr>
<th>To</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>create a comment</td>
<td>Create Comment from the Action Bar. A text box appears. Type a comment and click Submit.</td>
</tr>
<tr>
<td>delete a comment</td>
<td>the check box next to the comments to delete then select Delete.</td>
</tr>
<tr>
<td>sort comments</td>
<td>the column title to sort comments by that column.</td>
</tr>
</tbody>
</table>

**Overwrite Files**

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. You must have read, write and remove permissions to a file to overwrite it.

**Note:** Do not overwrite a file with a different file type. For example, a DOC file should not be overwritten with a JPG file.

**How to Overwrite a File**

1. Navigate to the folder that contains the item to be edited.
2. From the contextual menu next to the item select Overwrite File.
3. Click Browse to locate and select the file.
4. Click Submit.

**Note:** After uploading a new file, refresh the page to clear the browser cache and show the new file name.
Overwriting Files and Versioning

If Versioning is enabled on a file, and **Overwrite File** is selected (or the **Overwrite** check box 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.

Track Changes to Items

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

Before you Begin

Tracking must be turned on to view the Tracking Log. To turn on Tracking, select **Edit** from the contextual menu for the item and under Options, select **Enable Tracking**.

About the Tracking Log

The Tracking page lists each interaction with the item as a row. Each row includes the following information:

- The Name of the User that accessed the file.
- The Action that took place with the file.
- The Version of the file accessed. Note that the Version will appear only if Versioning is turned on.
- The Date the file was accessed.
- The IP address of the computer that the user used to access the file.

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 browser cookies and reads the file again, a second operation appears in the Tracking log.

How to View Tracking for an Item

1. Navigate to the folder that contains the item.
2. Select **Tracking** from the contextual menu for the item.
Deleting the Tracking Log

Selecting **Delete Tracking Log** from the Action Bar will remove all of the actions listed on the page. New actions will still be tracked.
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.

Manage Versions of Items

Versioning keeps track of each interaction with a file. When a file is locked from the Manage Versions page, another version is created. Edits can be made on the newest version.

The Manage Versions page lists the following information about each version:

- The version number as a hyperlink.
- The date and time the version was created.
- The person who created the version.
- The size of the file.

Note: Once a file is opened, it is automatically locked to other users. Users must use this option to make changes to the file and save them. To learn more about mounting Content Collection folders to your operating system for editing, see Using Web Folders and Shared Locations.

Before you Begin

Versioning must be turned on to keep track of the file. To turn on Versioning, select Edit from the contextual menu for the item and under Options, select Enable Versioning.

How to Manage Versions for an Item

1. Navigate to the folder that contains the item to be edited.
2. Select Versions from the contextual menu for the item.

   -OR-
   Click the number that appears in the Versions column next to the item in its home folder.
Manage Version Options

Set Up Web Folder: Clicking Set Up Web Folder on the Action Bar provides you with more information. It is important to note that when a file is opened through the Web Folder, it is locked automatically to other users.

Note: On the Mac, a Web Folder is called a Shared Location.

View the Version Number: The item opens in the web browser; users are unable to make changes or save new versions from this view.

Lock the File: When a file is locked, a new version is created and the options Unlock and Rollback appear in the contextual menu.

Rollback: This link only appears if you have the file locked. This will remove the copy you were editing without saving changes.

Delete Versions: Select a version and click Delete from the Action Bar.

Locking Versions

To create another version of your content, you must select Lock from the contextual menu next to the version number hyperlink on the Manage Versions page. Click the link of the newest version to open the file and make edits and save changes. If you are collaborating on an item, be sure to Unlock it to allow others to access the item.

360° View

The 360° View provides all the information stored about any piece of content in the Content Collection. The 360 View allows you to see all of the basic properties of the item, information on links that exist to the item, and any metadata associated with the item. Use the 360 View if you need to know at a quick glance who last edited an item, what the permanent URL is, and recent comments or file activity. This view is helpful if you want to look at all the information for an item in one place.

The 360° View is accessed from the contextual menu next to the item.
Viewing the Report

The 360 View page contains the following information on an item.

- Table of Contents
- Properties
- Comments
- Versions
- Learning Objects Catalog Entries
- Permissions
- Passes
- Links
- Tracking Data
- Metadata
**Content Folders**

**About Folders and Items**

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, "My Content."

**Folders**

A folder stores both items and other folders. It is important to remember that all folders are contained within other folders up to the top-level (/) folder. Entire Content Areas are folders stored under the top-level folder. Be aware that top-level folder access is generally reserved for the Administrator.

The size of each folder can be restricted to prevent unmanaged growth. Size quotas are definite for each folder, but flexible to allow some sub-folders a larger quota than others.

**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 them. Permissions, comments, and metadata functions work the same for items as for folders. Items include several other management features that are not used for folders.

**Managing Items and Folders**

The following options are available from the contextual menu next to the Item or Folder.

- **Comments:** Comments store text from users. Comments are opinions or instructions regarding the contents of an item or folder.

- **Passes:** Passes are created for an item to allow anyone, even those without a user account, controlled access to an 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 by providing them direct access to the file via an external URL.

- **Permissions:**

  Folders must be made available to a user, by the owner, before that user can view the contents of the folder. For example, the Instructor can make a folder for their Course available to Students. Users added to a folder are assigned permissions to control their actions within the folder. Permissions include: Read, Write, Remove, and Manage.

  Permissions are an easy way to share content while protecting it from unauthorized changes. 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.
- **Delete**: 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.

- **Alignments**: Align items or folders to goals in order to report goal coverage information for this course. Content items in the course can be aligned to current Source Goals that have been made available in the system. Once content has been aligned to standards, a Course Coverage Details report can be run from Course Reports on the Control Panel. This report displays goals coverage information for the course.

- **Tracking**: Tracking is used to view how other users interact with an item. 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.

- **Versions**: Versions are created 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.

- **Metadata**: Metadata is 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.

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**About Managing Content by Folder**

**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 sub-folders 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 editing or adding permissions to a parent folder, the user has the option to force all files and sub-folders 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 Delete permissions. Delete permissions would be removed from the file. All sub-folders and files within the parent folder would be granted Read and Write permissions.

If this option is not selected, the files and sub-folders 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 Delete permissions, the permissions for the file would remain Read, Write and Delete, and Manage would be added.

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

Organizing Content in Folders

Before adding any content to the Content Collection, users should plan out how they will manage their content. This allows you to organize content in a way which best meets your 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 sub-folders 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 sub-folders 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.

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 available for all users or only users with certain roles.

Storing Content

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

- **Private Folder**: A working area where projects that are in progress are stored. This folder is not shared with any users.
- **Group Folders**: Group collaboration folders, shared with other group members, where projects may be worked on together.
- **Private Course Material Folders**: If the user is an Instructor, a folder in this area may be used to store private Course information, such as Student Grades.
Granting Permissions

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

Private Content Space and Public Content Space

Creating separate folders for personal content and public content is a good best practice. 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.

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).

Creating a Private Folder

A private folder is created in the same way as other folders in the Content Collection, through the Create Folder option on the action bar. The permissions granted on the folder determine whether or not it is private. For example, a user may create a sub-folder in his or her username folder and not grant other users permissions to see it.

Creating a Public folder

Similar to private folders, public folders are created in the same way as other folders, using the Create Folder option on the action bar. 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. For example, a public folder may be created within a username folder and shared with a group of users collaborating on a project.

Organizing the User Folder

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

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

Storing Content

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

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

### Granting Permissions

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

### Using the Unique ID Tool

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

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

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

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

### How to Execute the Tool with a Log File

1. From a command line, execute the following command to run the tool and generate a log file:
   ```plaintext
   updatecspathtoxythosid > path/filename.txt
   ```
   Where `path` is the folder where the log file should be placed and `filename` should be the name of the log file.
2. Press ENTER.

### Deleting and Recycling Content

**Deleting Content**

Deleting an item or a folder removes it from the Content Collection. Deleted items may not be restored.

**Recycling Content**

Recycled items or folders are moved to the Recycle Bin folder. Recycled items may be restored.

To appear, the Recycle Bin must be enabled by the administrator. If the Recycle Bin is disabled, only the Delete option will appear. If the Recycle Bin is enabled, only the Recycle option will appear.
**Note:** The Recycle Bin folder will only appear once an item or folder is recycled. Recycle Bin folders are located within each User, Course, Organization, and Institution folder. These folders will only be available if the Blackboard administrator at your school has turned them on.

**How to Delete or Recycle Content**

Content can be Deleted or Recycled by selecting the available option from the contextual menu.

**How to Restore Recycled Content**

Click **Restore** from the list of options below the action bar. A confirmation message will pop-up, click **OK** to continue. The content will be moved to its previous location.

**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.

**Finding Folders**

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 delete 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.

**Searching for Files and Folders**

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.

**>Going To a 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.

**Bookmarking Folders**

Bookmarks enable quick access to frequently used content a without having to navigate through several folders. Bookmarks are 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.
Sending 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.

Creating 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.

Creating 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 edited or deleted, resulting in issues for the Portfolio users.

Finding Folders

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: For details about adding, editing, and removing permissions for folders, see About Managing Permissions for a Folder.

How to Find a Folder

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

Enter the search criteria in the field that appears on the Find Folder page. For example, if **Find Folder** is selected in the user’s folder, enter the usernames for the user folders to add. **Browse** may be used to search for any valid user, Course or Organization 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 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 LJJones removes the permissions for JSmith from his user folder, the LJJones folder will automatically disappear from the Content Collection menu for JSmith.

Deleting Folders from Display

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.

How to Delete Folders from Display

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 **Delete from Display**.

Editing Folder Properties

After a folder has been created, its settings can be changed from the Edit 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 edited.

How to Edit Folder Properties

1. Navigate to the folder that contains the folder to be edited.
2. Select **Edit** from the contextual menu for the folder to be edited.
3. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Folder Information</strong></td>
<td></td>
</tr>
<tr>
<td>Folder Name</td>
<td>View or change the name of the folder.</td>
</tr>
<tr>
<td>Location URL</td>
<td>The URL of the folder. This URL can only be accessed by users with an active user account and privileges to view the folder.</td>
</tr>
<tr>
<td>Permanent URL</td>
<td>The web link for this file that includes the unique, immutable identifier for it but not its location path. These persistent identifiers mean that links to Content Collection items no longer break.</td>
</tr>
<tr>
<td>Owner</td>
<td>Displays the Username of the person responsible for the maintaining the folder and its contents.</td>
</tr>
<tr>
<td>Created By</td>
<td>Displays the Username of the person who created the folder.</td>
</tr>
<tr>
<td>Created On</td>
<td>Displays the date and time the folder was created.</td>
</tr>
<tr>
<td>Last Edited By</td>
<td>Displays the Username of the person who last made changes to the folder.</td>
</tr>
<tr>
<td>Last Edited</td>
<td>Displays the latest date and time that changes were made to the folder.</td>
</tr>
<tr>
<td><strong>Quota Information</strong></td>
<td></td>
</tr>
<tr>
<td>Size</td>
<td>Displays the size of the folder in megabytes.</td>
</tr>
<tr>
<td>Quota in Megabytes</td>
<td>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.</td>
</tr>
<tr>
<td>Available Quota</td>
<td>Display only field that shows the amount of available space for the folder in which the new folder will reside. For example, when creating the folder /courses/history/documents this field will show the space available for /courses/history. The quota for a folder cannot exceed the available space in the folder that will hold it.</td>
</tr>
<tr>
<td><strong>Lock Options</strong></td>
<td></td>
</tr>
<tr>
<td>Lock</td>
<td>Select a lock for the folder from the following options:</td>
</tr>
<tr>
<td></td>
<td>- No Lock</td>
</tr>
<tr>
<td></td>
<td>- Lock This Folder</td>
</tr>
<tr>
<td></td>
<td>- Lock this Folder and everything it contains</td>
</tr>
<tr>
<td>Note:</td>
<td>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. If a folder is locked, the user will be unable to edit items through the Web Folder, for example, copying an item directly into the Web Folder.</td>
</tr>
<tr>
<td><strong>Comment Options</strong></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Select an option for handling comments:</td>
</tr>
<tr>
<td></td>
<td>- All comments on this folder are private</td>
</tr>
<tr>
<td></td>
<td>- Share comments on this folder</td>
</tr>
<tr>
<td></td>
<td>- Share comments on this folder and everything it contains</td>
</tr>
<tr>
<td></td>
<td>- All comments on this folder and everything it contains are private</td>
</tr>
<tr>
<td><strong>Version Options</strong></td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Versions</strong></td>
<td>Select an option for handling versioning:</td>
</tr>
<tr>
<td></td>
<td>• No Versions</td>
</tr>
<tr>
<td></td>
<td>• Enable versioning on the files within this folder</td>
</tr>
<tr>
<td></td>
<td>• Enable versioning on the files within this folder and all of its subfolders</td>
</tr>
<tr>
<td><strong>Tracking Options</strong></td>
<td>Select a tracking option for this folder:</td>
</tr>
<tr>
<td><strong>Tracking</strong></td>
<td>• No tracking</td>
</tr>
<tr>
<td></td>
<td>• Enable tracking on the files within this folder</td>
</tr>
<tr>
<td></td>
<td>• Enable tracking on the files within this folder and all of its subfolders</td>
</tr>
<tr>
<td><strong>Alignments Options</strong></td>
<td>Select an alignments option for this folder:</td>
</tr>
<tr>
<td><strong>Alignments</strong></td>
<td>• Apply Alignments to this folder only</td>
</tr>
<tr>
<td></td>
<td>• Apply Alignments to this folder and the files it contains</td>
</tr>
<tr>
<td></td>
<td>• Apply Alignments to this folder, its subfolders and all files they contain</td>
</tr>
<tr>
<td><strong>Metadata Options</strong></td>
<td>Select an option for handling metadata for this folder:</td>
</tr>
<tr>
<td><strong>Metadata</strong></td>
<td>• Metadata applies to this folder only</td>
</tr>
<tr>
<td></td>
<td>• Apply metadata to this folder and the files it contains</td>
</tr>
<tr>
<td></td>
<td>• Apply metadata to this folder, its subfolders and all files they contain</td>
</tr>
<tr>
<td></td>
<td>Metadata includes information about the files in this folder. Adding metadata to the files within this folder and all its subfolders will overwrite any existing metadata.</td>
</tr>
</tbody>
</table>

4. Click **Submit**.

### 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.

### Setting Folder Comment Options

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

#### How to Set Folder Comment Options

1. Navigate to the folder that contains the folder to be edited.
2. Select **Edit** from the contextual menu for the appropriate folder. The Edit Folder page appears.
3. Select one of the following options and click **Submit**:
   - All comments on this folder are private
   - Share comments on this folder
Setting Folder Comments as Private or Shared

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.

How to Set the Comment Options

1. Navigate to the folder that contains the folder to be edited.
2. Select Edit from the contextual menu for the appropriate folder. The Edit Folder page appears.
3. Select one of the following options and click Submit:
   - All comments on this folder are private
   - Share comments on this folder
   - Share comments on this folder and everything it contains
   - All comments on this folder and everything it contains are private

Adding Comments to a Folder

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 Setting Folder Comments as Private or Shared page.

How to Add Comments to a Folder

1. Navigate to the folder that contains the folder to be edited.
2. Select Comments from the contextual menu for the folder. The Comments page appears.

The following functions are available on the Comments page.

<table>
<thead>
<tr>
<th>To . . .</th>
<th>click . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>post a comment</td>
<td>Create Comment from the Action Bar. A textbox appears. Enter a comment and click Submit.</td>
</tr>
<tr>
<td>delete a comment</td>
<td>the check box in the same row as the comments to be deleted and select Delete.</td>
</tr>
<tr>
<td>sort comments</td>
<td>the caret above a column to sort comments by that column.</td>
</tr>
</tbody>
</table>

Subscribing to Folder Notifications

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

How to Find this page

From the contextual menu for the appropriate folder, click Notifications.

The Notifications page contains the following functions:
### How to Subscribe to a Folder

1. From the contextual menu for the appropriate folder, click **Notifications**.
2. Click **Create 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 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.

### Using web folders and shared locations

WebDAV is used for sharing files over the Internet and is compatible with most operating systems. When used with Blackboard Learn, WebDAV is a means for users to add to and access content in course files or the Content Collection, as if it were any other network drive or folder on their computers.

**Note:** Students cannot upload to course files.

When WebDAV—or a web folder—is set up, you can manage all the files for your course from your computer, dragging in content from multiple drives and folders and organizing it as needed.

**IMPORTANT!** When using a Mac, you will set up a shared location rather than a web folder.

You can perform other actions on the files and folders in a web folder or shared location because the folder structure is visible and can be navigated. Also, it is possible to edit a file directly in a web folder or shared location, without downloading it, editing it, and uploading it again. For users who have moved pre-9.1 content containing HTML files, they can use a web folder or shared location to access their files for editing in the program of their choice.

All you need to connect to a web folder or shared location is the web address of the course files or Content Collection folder and a valid username and password. web folders and shared locations mount a folder and all its subfolders and files to the operating system. Files may be opened and accessed with any appropriate application for viewing and editing.

Many users are accustomed to using WebDAV and prefer to continue to use this method for file management.
Web Folder Availability

If web folders are not available, the Blackboard administrator at your school may have disabled the feature.

About File Names

The characters that are acceptable in file names include:

- a-z
- 0-9
- period '.'
- underscore '_'

All standard ISO 8859 characters (not foreign characters or symbols) are also supported.

All spaces are converted to underscores '_' in the name of the uploaded file. Special characters are not supported in file names.

How to Set up a web folder for Microsoft Windows©

1. Access course files or the Content Collection.
2. Click Set Up web folder on the Action Bar of the top-level folder. Starting from this location ensures WebDAV access to all folders contained in the repository. Any folder may be selected inside course files or the Content Collection, but the web folder path must be less than 240 characters. Each folder selected has a different address.
3. On the Using web folders page, right-click and copy the URL that appears for Current Web address. You will paste the address in later steps.
5. Select Add a network place from the Network Tasks menu.
6. In the Add Network Place Wizard, select Choose another network location to create a shortcut.
7. Paste the URL for the web folder you copied earlier and click Next.
8. Type your Blackboard Learn username and password, if prompted. Type a name for the network place and click Next. Click Finish to close the wizard. You may be prompted again for a username and password.
9. The web folder opens and displays the files and folders in the course files or Content Collection folder. Locate the appropriate folder to which to add files or folders. Locate the folder on your computer containing the files and folders you want to transfer.
10. With your folder and the web folder open, move one or more files and folders between them using the drag-and-drop function. Click a file and press, then drag it to the destination folder. Release the mouse button and it is dropped in the folder. Files and folders dragged to the web folder are copied to the course files or the Content Collection. Also, files and folders from the web folder can be copied to your computer. Alternatively, use copy and paste rather than the drag-and-drop function.
11. In the repository, click Refresh on the Action Bar to view the added files.

After all files and folder have been copied, disconnect from the web folder. If you do not disconnect, the server connection remains open until the computer is shut down. If you use a computer that others use, they will have access to everything in your repository.
When you need to use the web folder in the future, access My Network Places and select the web folder shortcut you created.

How to Set up a shared location for the Apple Mac OS©

1. Access course files or the Content Collection.
2. Click Set Up shared location on the Action Bar of the top-level folder. Starting from this location ensures WebDAV access to all folders contained in the repository. Any folder may be selected inside Course Files or the Content Collection, but the Shared Folder path must be less than 240 characters. Each folder selected has a different address.
3. On the Using shared location page, copy the URL that appears for Current Web address. You will paste the address in later steps.
4. On the Finder bar, select Go > Connect to Server.
5. In the Connect to Server window, paste the URL you copied into the Server Address box. Click Connect.
   
   Note: Click the plus sign next to the pasted address to add it to Favorite Servers. You can select the address and not copy it each time. In the future, start with step 4 to connect to this shared location.
6. If the WebDAV File System Authentication window appears, type your Blackboard Learn login username and password. Click OK.
7. Once you are connected to the shared location, the Mac network icon appears on your desktop. Double-click the icon to open the shared location. Locate the appropriate folder to which to add files or folders.
8. Locate the folder on your computer containing the files and folders you want to transfer.
9. With your folder and the shared location open, move one or more files and folders between them using the drag-and-drop function. Click a file and press, then drag it to the destination folder. Release the mouse button and it is dropped in the folder. Files and folders dragged to the shared location are copied to course files or the Content Collection. Also, files and folders from the shared location can be copied to your computer. Alternatively, use copy and paste rather than the drag-and-drop function.
10. In course files or the Content Collection, click Refresh on the Action Bar to view the added files.

After using the shared location, some files may appear with duplicate file names that begin with "._" or ".DS Store." They can be safely deleted from the repository.

When all files and folders have been copied, close the window and drag the Mac network icon to the trash to disconnect from the shared location. If you do not disconnect, the icon and server connection remain open until the computer is shut down. If you use a computer that others use, they will have access to everything in your repository.
Permissions

Granting Permissions

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 editing, managing and removing content.

Permissions enable users to read and perform actions on items and folders added to the Content Collection. Users must be granted permission to access content directly from the Content Collection and also through links in Courses and Portfolios.

The following points explain how permission are used throughout the Content Collection.

- **Types of Permissions**: There are four types of permissions to select.
- **About Default Permissions**: Some users have default permissions to specific folders. In this case, various permissions are automatically granted to specific folders.
- **Granting Permissions**: Any user with Read and Manage permission on an item or folder may grant permissions to other users and user lists.
- **Receiving Permissions**: Users and groups of users, may be granted one or more permissions.
- **Managing Permissions**: User access to an item or folder is controlled through the Manage Permissions page.
- **Overwriting Permissions**: Overwrite permissions are available to choose how the contents of a folder are affected when Permissions are edited.

Types of Permissions

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.

When a user searches for files or folders, or attempts to manipulate files or folders (for example, using copy, move or remove), the user 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.

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 Delete permissions to his or her user folder. The Administrator determines the availability of these folders on a system-wide basis.
- **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
Permissions

Granting Permissions

Any user with Read and Manage permission on an item or folder may grant permissions to other users and user lists.

Receiving Permissions

Users and groups of users, 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. Permissions may be edited for sub-folders and items within a folder.

Managing Permissions

User access to an item or folder is controlled through the Manage Permissions page. Users can be granted permission individually, in groups, or by role. Follow these steps to open the Manage Permissions page for an item or folder.

1. Navigate to the folder that contains the folder to be edited.
2. Select Permissions from the contextual menu for the folder.
3. Select the appropriate option from the action bar. Complete the page that follows and click Submit.

Note: When permissions are granted on a folder, they apply to all sub-folders and items within the folder.

Overwriting Permissions

Permissions granted to a folder may or may not affect items and sub-folders 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 edited.

If the Overwrite option is selected, the current permissions for all items and sub-folders in the folder are removed. The permissions selected in the Permissions field are granted to these items and sub-folders. After editing 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.
Adding Permissions to an Item or Folder

Permissions are added and removed on the Manage Permissions page for an item or folder. Permissions can be added according to the following methods:

- By adding specific users
- By adding specific user roles
- By adding specific lists of users (Course, Course Group, Organization, Organization Group, Outcomes)

Adding Specific Users

1. Open the Content Collection folder where the item is located (for example, /users).
2. Select Permissions from the contextual menu for the appropriate item. The Manage Permissions page appears.
3. Click Select Specific Users. The Add User page appears.
4. Select Usernames and Permissions:
   - **Note:** If permissions are added for a user or user list but no check boxes for specific permissions (Read, Write, Manage, and Delete) 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.
5. Click Submit.

Granting Everyone Permission

There are two ways of granting permission to all users:

- Click Permit Anyone from the Action Bar.
- Select All Roles from the Select Roles drop-down list.

Granting Permissions to Folders Versus Items

Permissions granted to a folder may or may not affect items and sub-folders 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 edited.

If the Overwrite option is selected, the current permissions for all items and sub-folders in the folder are removed. The permissions selected in the Permissions field are granted to these items and sub-folders. After editing 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.
Managing Permissions for an Item

About Managing Permissions for an Item

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

How to Manage Item Permissions

1. Navigate to the folder that contains the item to be edited.
2. Select Permissions from the contextual menu for the item.

Functions

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

<table>
<thead>
<tr>
<th>To...</th>
<th>click...</th>
</tr>
</thead>
<tbody>
<tr>
<td>add a user</td>
<td>Select Specific Users 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.</td>
</tr>
<tr>
<td>add a user list</td>
<td>a User List from the Select Specific Users by Place drop-down list. From this page a list of users can be added and permissions set.</td>
</tr>
<tr>
<td>add specific user roles</td>
<td>Institution Roles from the Select Roles drop-down list. From this page a list of user roles can be added and permissions set.</td>
</tr>
<tr>
<td>grant permissions to all users</td>
<td>Permit Anyone from the Action Bar or select All Roles from the Select Roles drop-down list.</td>
</tr>
<tr>
<td>delete a user or a user list</td>
<td>the check box next to the user or user list then click Delete 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.</td>
</tr>
<tr>
<td>edit the permissions for a group</td>
<td>Edit from the contextual menu for the appropriate user or group. The Edit Permissions page appears.</td>
</tr>
</tbody>
</table>

Permissions Warning

Editing 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 edits 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.

Adding a User or User List to an Item

Adding users or a list of users to an item allows the user or users to access the item according to the permissions set.
Note: For detailed information about adding permissions for different groups of users to an item, such as an Institution Role User List and All System Accounts, see About Managing Permissions for an Item.

### How to Add a User or User List to an Item

1. Open the Content Collection folder where the item is located (for example, /users).
2. From the contextual menu next to the folder, select Permissions.
3. On the action bar, point to Select Specific Users by Place and select a user list.
4. Complete and submit the Add User List page.
   
   Note: If permissions are added for a user or user list but no check boxes for specific permissions (Read, Write, Manage, and Delete) 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.
5. Click Submit.

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.

### Managing Permissions for a Folder

#### About Managing Permissions for a Folder

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

#### How to Manage Folder Permissions

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

1. Navigate to the folder that contains the folder to be edited.
2. Select Permissions from the contextual menu for the folder.

When permissions are granted on a folder, they apply to all sub-folders 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 sub-folders and items within the folder. Read permission may then be removed from specific sub-folders and items. Thus, Instructors and Students can work with items in the same folder and the Instructor can protect certain items from being edited by a Student.

#### Functions

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

<table>
<thead>
<tr>
<th>To add a user</th>
<th>click Select Specific Users in the Action Bar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>add a list of users</td>
<td>a User List from the Select Specific Users by Place drop-down list. From this page a list of users can be added and permissions set.</td>
</tr>
</tbody>
</table>
Permissions

Managing Permissions for a Folder

To... click ...

To add specific user roles Institution Roles from the Select Roles drop-down list. From this page a list of user roles can be added and permissions set.

To grant permissions to all users Permit Anyone from the Action Bar or select All Roles from the Select Roles drop-down list.

To delete a user or a list of users the check box next to the user or user list then click Delete 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.

To edit the permissions for a group Edit from the contextual menu for the appropriate user or group.

Permissions Warning

Editing 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 edits 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.

Adding a User to a Folder

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

How to Add a User to a Folder

1. Navigate to the folder to be edited.
2. From the contextual menu next to the folder, select Permissions.
3. From the action bar, click Select Specific Users.
4. Complete the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Users [r]</td>
<td>Individual users can be added by entering each Username or using the search function to find each user to include. Multiple usernames, separated by commas, may be entered.</td>
</tr>
<tr>
<td>Set Permissions</td>
<td>Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see About Managing Permissions for a Folder.</td>
</tr>
<tr>
<td>Advanced Folder Options</td>
<td>If Overwrite is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the Permissions field are granted to these items and subfolders. If this option is not selected, the permissions selected in the Permissions field are granted to items and subfolders, but existing permissions are not removed.</td>
</tr>
</tbody>
</table>

5. Click Submit.

Adding a Course User List or Organization User List to a Folder

Adding users from a Course to a folder allows the users to access the folder according to the permissions.
How to Add a Course User List to a Folder

1. Navigate to the folder to be edited.
2. From the contextual menu next to the folder select Permissions.
3. On the action bar, point to Select Specific Users By Place and select Course.
4. Complete the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose Courses</td>
<td>Select each box for the Course User Lists to include.</td>
</tr>
<tr>
<td>Courses [r]</td>
<td>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.</td>
</tr>
<tr>
<td>Additional Courses</td>
<td>Select each box for the user roles that will be granted permissions.</td>
</tr>
<tr>
<td>Roles [r]</td>
<td>Select each box for the permissions that will be applied to the user or users. For a description of each permission see About Managing Permissions for a Folder.</td>
</tr>
<tr>
<td>Set Permissions</td>
<td>If Overwrite is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the Permissions field are granted to these items and subfolders. If this option is not selected, the permissions selected in the Permissions field are granted to items and subfolders, but existing permissions are not removed.</td>
</tr>
</tbody>
</table>

5. Click Submit.

Adding an Institution Role User List to a Folder

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

How to Add an Institution Role User List to a Folder

1. Navigate to the folder that contains the folder to be edited.
2. Select Permissions from the contextual menu for the appropriate folder. The Manage Permissions page appears.
3. Select Institution Roles from the Select Roles drop-down list.
4. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Roles</td>
<td></td>
</tr>
<tr>
<td>Institution Roles [r]</td>
<td>This folder is available to users with roles that appear in the <strong>Selected Roles</strong> box. Select which roles will have access to the folder in the <strong>Available Roles</strong> box and use the arrows to move these roles to the <strong>Selected Roles</strong> box.</td>
</tr>
</tbody>
</table>

Set Permissions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions</td>
<td>Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see About Managing Permissions for a Folder.</td>
</tr>
</tbody>
</table>

Advanced Folder Options

If **Overwrite** is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the **Permissions** field are granted to these items and subfolders. If this option is not selected, the permissions selected in the **Permissions** field are granted to items and subfolders, but existing permissions are not removed.

5. Click **Submit**

Adding Public Permissions to a Folder

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.

How to Add Public Permissions to a Folder

1. Navigate to the folder that contains the folder to be edited.
2. Select **Permissions** from the contextual menu for the appropriate folder. The Manage Permissions page appears.
3. Select **Permit Anyone** from the Action Bar.
4. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions</td>
<td>Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see About Managing Permissions for a Folder.</td>
</tr>
</tbody>
</table>

Advanced Folder Options

If **Overwrite** is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the **Permissions** field are granted to these items and subfolders. If this option is not selected, the permissions selected in the **Permissions** field are granted to items and subfolders, but existing permissions are not removed.

5. Click **Submit**.
Adding All System Account Permissions to a Folder

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.

How to Add All System Account Permissions to a Folder

1. Navigate to the folder that contains the folder to be edited.
2. From the contextual menu next to a folder select Permissions.
3. On the action bar, point to Select Roles and click All Roles.
4. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions</td>
<td>Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see About Managing Permissions for a Folder.</td>
</tr>
</tbody>
</table>

Advanced Folder Options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overwrite</td>
<td>If Overwrite is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the Permissions field are granted to these items and subfolders. If this option is not selected, the permissions selected in the Permissions field are granted to items and subfolders, but existing permissions are not removed.</td>
</tr>
</tbody>
</table>

5. Click Submit.

Adding Course and Organization Group Permissions to a Folder

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 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.

How to Add Course and Organization Groups to a Folder

1. Navigate to the folder that contains the folder to be edited.
2. Select Permissions from the contextual menu for the appropriate folder. The Manage Permissions page appears.
3. Select Group or Organization Group from the Select Specific Users by Place drop-down list.
4. Complete the following fields as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose Course/Organization</td>
<td>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.</td>
</tr>
<tr>
<td>Groups</td>
<td></td>
</tr>
<tr>
<td>Set Permissions</td>
<td>Check each box for the permissions that will be applied to the user or users. For a full description of each permission, see About Managing Permissions for a Folder.</td>
</tr>
<tr>
<td>Advanced Folder Options</td>
<td></td>
</tr>
<tr>
<td>Overwrite</td>
<td>If Overwrite is selected, the current permissions for all folders and subfolders are removed. The permissions selected in the Permissions field are granted to these items and subfolders. If this option is not selected, the permissions selected in the Permissions field are granted to items and subfolders, but existing permissions are not removed.</td>
</tr>
</tbody>
</table>

5. Click Submit.

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 no longer appear on this page and permissions will be removed.

Using Passes to Share Content With Users Outside the System

Passes are used as a means of sharing an item or folder with a user who does not have access to the Content Collection. Passes are a safe way to collaborate on projects with others outside the school because the access is specific and controlled.

About Passes

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.

Passes are listed in a table on the Manage Passes page. Each row represents one pass containing the following information:

- The date and time the pass expires
- The permissions assigned to the pass. A green checkmark represents that the privilege is available.
- The URL that will allow those outside the Content Collection to access the pass.
Permissions > Table of Permissions Required for Specific Actions

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

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’.

Receiving Passes

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.

How to Create a Pass

1. Navigate to the folder that contains the item or folder.
2. Select Passes from the contextual menu for the item.
3. Click Create Pass in the Action Bar.
4. Enter information in the following fields and click Submit.

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.

How to Email Passes

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 path for accessing the Content Collection item or folder.

If the user is granted Read and Write permissions to the item, the URL path 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 path. The URL path 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.

1. Navigate to the folder that contains the item or folder.
2. Select Passes from the contextual menu for the item.
3. Select a pass by clicking the check box next to it.
4. Click Email Pass on the Action Bar.
5. Enter the require information on the Email Passes page and click Submit.

Table of Permissions Required for Specific Actions

The following table explains which permissions are required for specific actions. In the case of folders, the user generally needs the permission on the folder and all its contents, subfolders and their contents.
**Note:** Read permission on subfolders is not always necessary, as long as the user has Read permission on the folder he or she is working with, and has other necessary permissions to the folder and its content. For example, if a user has Read and Delete permission on a parent folder and only Delete 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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Required Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a file or folder</td>
<td>Read and Write permission on the current folder</td>
</tr>
<tr>
<td>Add, Edit or Delete permissions</td>
<td>Read and Manage permissions on an item</td>
</tr>
<tr>
<td>View permissions</td>
<td>Read and Manage permissions on an item</td>
</tr>
<tr>
<td>Download a file or folder</td>
<td>Read permission on file or folder and all items and folders within the folder to be downloaded.</td>
</tr>
<tr>
<td>Email a file or folder</td>
<td>Read permission on the item or folder</td>
</tr>
<tr>
<td>View properties for a file or folder</td>
<td>Read permission on the item</td>
</tr>
<tr>
<td>Copy a file or folder</td>
<td>Read permission on the item (and all its subfolders and files in the case of folders) and Write permission on the destination folder</td>
</tr>
<tr>
<td>Edit properties for a file or folder</td>
<td>Read and Write permissions on the item</td>
</tr>
<tr>
<td>Move a file or folder</td>
<td>Read and Delete permissions on the item to be moved, Write on the destination folder</td>
</tr>
<tr>
<td>Delete a file or folder</td>
<td>Read and Delete permissions on the item</td>
</tr>
<tr>
<td>Lock and unlock a file or folder</td>
<td>User must have Read and Write on permissions the item. Only the lock owner (the user who set the lock) may unlock an item.</td>
</tr>
<tr>
<td>Add a comment to or view a comment on a file or folder</td>
<td>Read permission on the item or folder if Comments are shared. Read and Manage permissions on the item or folder if Comments are private</td>
</tr>
<tr>
<td>Bookmark a file or folder</td>
<td>Read permission on the item</td>
</tr>
<tr>
<td>Tracking – enable/disable</td>
<td>Read and Manage permissions on the item</td>
</tr>
<tr>
<td>Versions – checkout a file</td>
<td>Read and Write permissions on the item</td>
</tr>
<tr>
<td>Versions – check in a file</td>
<td>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.</td>
</tr>
<tr>
<td>Version – remove a file</td>
<td>Read, Write, and Delete permissions on item</td>
</tr>
<tr>
<td>Version – rollback a file</td>
<td>Only the lock owner (person who checked out the file) may rollback a version. User must have Read and Write permissions on the item.</td>
</tr>
<tr>
<td>Workflow – add a file</td>
<td>Read and Manage permissions on the item</td>
</tr>
<tr>
<td>Workflow – add a comment</td>
<td>User must be the Workflow Activity owner or recipient</td>
</tr>
<tr>
<td>Workflow – edit a file</td>
<td>User must be the Workflow Activity owner</td>
</tr>
<tr>
<td>Workflow – remove a comment from a sent or received Workflow Activity</td>
<td>User must be the Workflow Activity owner or the user who submitted the comment</td>
</tr>
</tbody>
</table>

**Frequently Asked Questions**

There are some common scenarios where users may have questions 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, a few common instances exist where a user cannot see a file or folder because of other system rules.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>A user is enrolled in a class, but the Course folder does not appear under Courses or e-Reserves.</td>
<td>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.</td>
</tr>
<tr>
<td>A user is enrolled in an Organization, but the Organization User Folder does not appear under e-Reserves.</td>
<td>Organizations do not have folders under e-Reserves; only Course folders appear under e-Reserves.</td>
</tr>
<tr>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>A user can view a folder, but not all of its contents</td>
<td>The user has Read access to the folder, but not to its contents.</td>
</tr>
</tbody>
</table>

**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, a few common instances exist where this may not be the case.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>A user has Manage permission on an item, but is unable to copy it to a different folder.</td>
<td>The user does not have Write permission on the destination folder.</td>
</tr>
<tr>
<td>A user may view a file or folder but is unable to link to it from a Portfolio.</td>
<td>The user only has Read access to the file or folder; Manage access is required to link the file or folder to a Portfolio. <strong>Note:</strong> 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.</td>
</tr>
</tbody>
</table>
Metadata

About Metadata

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. There are four Metadata Templates: Dublin Core, Full IMS, General, and IMS. These templates can be made available to all users and edited but not deleted from the system.

In addition Goals that are created in Outcomes Assessments may also be treated as metadata and used to align Content Collection items. To learn more, see Outcomes Assessments.

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

Adding Metadata to an Item

Adding General Metadata

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.

How to Add General Metadata to a Content Collection Item

1. Navigate to the folder that contains the item to be edited.
2. Select General Metadata from the contextual menu.
3. Complete the following fields and click Submit when finished.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the item. This name will not change the file name of the item.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the item.</td>
</tr>
<tr>
<td>Keywords</td>
<td>List keywords associated with the item separated by commas.</td>
</tr>
<tr>
<td>Learning Objectives</td>
<td>List Learning Objectives associated with the item separated by commas.</td>
</tr>
</tbody>
</table>

Adding IMS Metadata

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.

How to Add IMS Metadata to a Content Collection Item

1. Navigate to the folder that contains the item to be edited.
2. Select IMS Metadata from the contextual menu.
3. Complete the following fields and click Submit when finished.
Adding Metadata to an Item

Field | Description
--- | ---
**IMS Metadata** | 
Identifier | A unique label for the item.
Catalog Type | A library catalog type in which this item is catalogued.
Catalog Entry | The catalog number for this specific item.
Language | The language the language of the item.
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
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
Age Range | The age range for the intended users.
Difficulty | Indicate the level of difficulty of this item.
Free Resource | Click the check box if this item is free. Leave it blank if it is not.
Restricted Use | Click the check box this item is restricted. Leave it blank if it is not.

Adding Full IMS Metadata

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.

How to Add IMS Metadata to a Content Collection Item

1. Navigate to the folder that contains the item to be edited.
2. Select **Full IMS Metadata** from the contextual menu for the item.
3. Complete the following fields and click **Submit** when finished.

Field | Description
--- | ---
**General Metadata** | 
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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>A general description for the item.</td>
</tr>
<tr>
<td>General Keyword</td>
<td>The description of the item relative to its stated purpose.</td>
</tr>
<tr>
<td>General Coverage</td>
<td>The historical context of the item.</td>
</tr>
<tr>
<td>General Structure</td>
<td>The structure of the item.</td>
</tr>
<tr>
<td>General Aggregation Level</td>
<td>The functional size of the resource. Select 1–4 from the drop-down list.</td>
</tr>
<tr>
<td>Lifecycle</td>
<td></td>
</tr>
<tr>
<td>Lifecycle Version</td>
<td>The edition of the item.</td>
</tr>
<tr>
<td>Lifecycle Status</td>
<td>The editorial condition of the item.</td>
</tr>
<tr>
<td>Lifecycle Role</td>
<td>The kind of contribution.</td>
</tr>
<tr>
<td>Lifecycle Entity</td>
<td>The individual entity or entities involved with the item. Examples include author, publisher, or university department.</td>
</tr>
<tr>
<td>Lifecycle Date</td>
<td>Date of contribution in the lifecycle.</td>
</tr>
<tr>
<td>Metadata</td>
<td></td>
</tr>
<tr>
<td>Metadata Identifier</td>
<td>A unique label for the meta-data.</td>
</tr>
<tr>
<td>Metadata Catalog</td>
<td>The source of a following string value.</td>
</tr>
<tr>
<td>Metadata Entry</td>
<td>A feature of the description rather than the resource.</td>
</tr>
<tr>
<td>Metadata Role</td>
<td>The kind of contribution.</td>
</tr>
<tr>
<td>Metadata Entity</td>
<td>The entity or entities involved, most relevant first.</td>
</tr>
<tr>
<td>Metadata Date</td>
<td>Date of contribution.</td>
</tr>
<tr>
<td>Metadata Scheme</td>
<td>The structure of the metadata, including version.</td>
</tr>
<tr>
<td>Metadata Language</td>
<td>The language of the item.</td>
</tr>
<tr>
<td>Technical</td>
<td></td>
</tr>
<tr>
<td>Technical Format</td>
<td>The technical data of the item. Examples include PDF, database file, or Word document.</td>
</tr>
<tr>
<td>Technical Size</td>
<td>The size of the item in bytes. Only the digits 0–9 should be used. Note that the unit is bytes, not MB, GB, etc.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>Technical Location</td>
<td>The location of the item in the Content Collection.</td>
</tr>
<tr>
<td>Technical Type</td>
<td>The type of requirement.</td>
</tr>
<tr>
<td>Technical Name</td>
<td>The name of the required item.</td>
</tr>
<tr>
<td>Technical Minimum Version</td>
<td>The lowest version of the required item.</td>
</tr>
<tr>
<td>Technical Maximum Version</td>
<td>The highest version of the required item.</td>
</tr>
<tr>
<td>Technical Installation Remarks</td>
<td>Description on how to install the item.</td>
</tr>
<tr>
<td>Technical Other Platform Requirements</td>
<td>Any special need to access the item. An example is the Adobe Reader which is needed to access a PDF file.</td>
</tr>
<tr>
<td>Technical Duration</td>
<td>The time a continuous item takes when played at intended speed, in seconds.</td>
</tr>
<tr>
<td>Educational</td>
<td></td>
</tr>
<tr>
<td>Educational Interactivity Type</td>
<td>The type of interactivity supported by the item.</td>
</tr>
<tr>
<td>Educational Learning Resource Type</td>
<td>The specific kind of resource, most dominant kind first.</td>
</tr>
<tr>
<td>Educational Interactivity Level</td>
<td>The level of interactivity between an end user and the learning object.</td>
</tr>
<tr>
<td>Educational Semantic Density</td>
<td>The subjective measure of the learning object's usefulness as compared to its size or duration.</td>
</tr>
<tr>
<td>Educational Intended User Role</td>
<td>The type of user of the item. Examples include Instructor, Student, and librarian.</td>
</tr>
<tr>
<td>Educational Context</td>
<td>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</td>
</tr>
<tr>
<td>Educational Typical Age Range</td>
<td>The age range for the intended users.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Educational Difficulty</td>
<td>Indicate the level of difficulty of this item.</td>
</tr>
<tr>
<td>Educational Typical Learning Time</td>
<td>Approximate or typical time it takes to work with the resource.</td>
</tr>
<tr>
<td>Educational Description</td>
<td>The comments on how the learning object is to be used.</td>
</tr>
<tr>
<td>Educational Language</td>
<td>The natural language of the user.</td>
</tr>
<tr>
<td>Rights</td>
<td></td>
</tr>
<tr>
<td>Rights Cost</td>
<td>Whether or not use of the item requires payment.</td>
</tr>
<tr>
<td>Rights Copyright and Other Restrictions</td>
<td>Whether or not copyright or other restrictions apply.</td>
</tr>
<tr>
<td>Rights Description</td>
<td>Comments on the conditions of use of the resource.</td>
</tr>
<tr>
<td>Relation</td>
<td></td>
</tr>
<tr>
<td>Relation Kind</td>
<td>The nature of the relationship between the item being described and the one identified by Resource (7.2).</td>
</tr>
<tr>
<td>Relation Identifier</td>
<td>The unique identifier of the other item.</td>
</tr>
<tr>
<td>Relation Description</td>
<td>The features of the item in relation to other items in the Content Collection.</td>
</tr>
<tr>
<td>Relation Catalog</td>
<td>The source of the following string value.</td>
</tr>
<tr>
<td>Relation Entry</td>
<td>The actual value.</td>
</tr>
<tr>
<td>Annotation</td>
<td></td>
</tr>
<tr>
<td>Annotation Person</td>
<td>The user who comments upon an item.</td>
</tr>
<tr>
<td>Annotation Date</td>
<td>The date comments were made to an item.</td>
</tr>
<tr>
<td>Annotation Description</td>
<td>Comments on the educational uses of the item.</td>
</tr>
<tr>
<td>Classification</td>
<td></td>
</tr>
<tr>
<td>Classification Purpose</td>
<td>Description of a characteristic of the item by classification entries.</td>
</tr>
<tr>
<td>Classification Source</td>
<td>The specific classification.</td>
</tr>
<tr>
<td>Classification Taxon</td>
<td>The classification entry for the item; an ordered list of taxons create a taxon path.</td>
</tr>
<tr>
<td>Classification ID</td>
<td>The Taxon's identifier in taxonomic system.</td>
</tr>
</tbody>
</table>
Adding Dublin Core Metadata

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.

How to Add Dublin Core Metadata to a Content Collection Item

1. Navigate to the folder that contains the item to be edited.
2. Select Dublin Core Metadata from the contextual menu.
3. Complete the following fields and click Submit when finished.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a name for the item. This name will not change the file name of the item.</td>
</tr>
<tr>
<td>Creator</td>
<td>Enter the person or organization that made the item.</td>
</tr>
<tr>
<td>Subject</td>
<td>Enter the subject of the item.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the item.</td>
</tr>
<tr>
<td>Publisher</td>
<td>Enter the name of the person or organization that published the item.</td>
</tr>
<tr>
<td>Contributor</td>
<td>Enter the names of people who contributed to the item’s content.</td>
</tr>
<tr>
<td>Date</td>
<td>Enter the date the item was created.</td>
</tr>
<tr>
<td>Type</td>
<td>Enter the category or genre for this item.</td>
</tr>
<tr>
<td>Format</td>
<td>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.</td>
</tr>
<tr>
<td>Identifier</td>
<td>Enter a unique reference for this item, for example a number it is associated with in an identification system.</td>
</tr>
<tr>
<td>Source</td>
<td>Enter the name of the resource from which this item comes.</td>
</tr>
<tr>
<td>Language</td>
<td>Enter the language of the item.</td>
</tr>
<tr>
<td>Relation</td>
<td>Enter a reference to a source that is related to this item.</td>
</tr>
<tr>
<td>Coverage</td>
<td>Enter the location and date range of this item.</td>
</tr>
<tr>
<td>Rights</td>
<td>Enter Intellectual Property Rights and Copyright information.</td>
</tr>
</tbody>
</table>
Adding Dynamic Metadata

Instructors can add metadata to a Content Collection 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 upgraded in the Course when it is updated in the Content Collection.

How to Add Dynamic Metadata to a Content Collection Item

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

<table>
<thead>
<tr>
<th>Metadata Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox</td>
<td>Click the appropriate check box to select all of the available attributes for that metadata type.</td>
</tr>
<tr>
<td>Metadata Picker</td>
<td>Click the plus sign to expand and select the appropriate metadata attributes. Click the minus sign icon to collapse the list.</td>
</tr>
</tbody>
</table>

4. Choose from the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Values | Click the Keep these values synchronized check box to maintain a dynamic link between the Content Collection and the Course for the item.  
**Note:** If this option is not selected, then the metadata is only copied to the Course. Any changes made to the item's metadata are not reflected in the Course and vice versa. |
| Format | Choose between a tabular or condensed format for the metadata. The Sample Format field displays how each option appears. |

5. Click Submit when finished.

Adding Custom Metadata

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

How to Add Custom Metadata to a Content Collection Item

1. Navigate to the folder that contains the item to be edited.
2. Select Custom Metadata from the contextual menu for the item.
3. Complete the fields and then click Submit.

Creating Metadata Templates

Creating a Metadata Template

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:** To learn more about attributes, see Managing Metadata Attributes.
How to Create a Template

1. Click the Metadata Templates link from the Tools menu.
2. Click Create Template.
3. Enter text that appears at the top of the template in the Page header field. This is a required field.
4. Enter the name of the template in the Form Name field. This is a required field.
5. Enter a description of the template in the Description field.
6. Click Submit. The Form Design page appears.

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.

Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Choose a design element from the Add drop-down list:</td>
</tr>
<tr>
<td></td>
<td>- Instructions. These instructions appear at the top of the page when creating a Metadata Template.</td>
</tr>
<tr>
<td></td>
<td>- Step Header. A graphical break in a template, which is used for logical grouping of data entry fields.</td>
</tr>
<tr>
<td></td>
<td>- Field. An individual data field.</td>
</tr>
<tr>
<td>Delete</td>
<td>Select design elements and click Delete to delete them from the template.</td>
</tr>
<tr>
<td>Preview</td>
<td>Click to preview the template in progress. The metadata template is displayed in a new window.</td>
</tr>
<tr>
<td>Page Instructions</td>
<td>Click Edit to change the page instructions.</td>
</tr>
<tr>
<td>Step header:</td>
<td>Click Edit to change the Step Header text.</td>
</tr>
<tr>
<td>Details</td>
<td></td>
</tr>
</tbody>
</table>

Adding Instructions to a Metadata Template

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.

How to Add Instructions

1. Select Instructions from the Add drop-down list on the Form Design page. The Add Instructions page appears.
2. Type the instructions in the Instructions Text Editor.
3. Click Submit. The Form Design page appears with the instructions displayed.

Add Step Header to a Metadata Template

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.
How to Add a Step Header

1. Select **Step Header** from the **Add** drop-down list on the Form Design page. The **Add Step Header** page appears.
2. Type the header text in the **Step Header** field. This field has a limit of 80 characters.
3. Click **Submit**. The **Form Design** page appears with the Step Header displayed.

Adding Fields to a Metadata Template

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.

How to Find this page

Select **Field** from the **Add** drop-down list on the **Form Design** page. The **Add Field** page appears.

How to Add a New Field

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** check box to designate the field as Read-Only.
6. Click **Next**. The **Format Field** page appears.
7. Click **Submit** when finished. The **Edit Template** page appears.

How to Add an Existing Field

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:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Value Type</strong></td>
<td>Select an attribute type to view from the drop-down list.</td>
</tr>
<tr>
<td><strong>External</strong></td>
<td>Select a Read-Only status:</td>
</tr>
<tr>
<td></td>
<td>All. View all attributes.</td>
</tr>
<tr>
<td></td>
<td>Yes. View Read-Only attributes.</td>
</tr>
<tr>
<td></td>
<td>No. View Read/Write attributes.</td>
</tr>
<tr>
<td><strong>And</strong></td>
<td>Select another criteria to view:</td>
</tr>
<tr>
<td></td>
<td>Name. Search in the Name field.</td>
</tr>
<tr>
<td></td>
<td>Description. Search in the Description field.</td>
</tr>
</tbody>
</table>
Creating Metadata Templates

Function | Description
---|---
Contains/Starts with/Equal to | Choose Contains, Starts with, or Equal to, enter the text to view in the text box and click Go.

Page Navigation

<table>
<thead>
<tr>
<th>Number links</th>
<th>Click a number link to display a page of specific attributes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next/Previous</td>
<td>Click the Next or Previous link to page through the list of attributes.</td>
</tr>
</tbody>
</table>

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 Edit Template page appears.

Formatting Metadata Template Fields

New and existing fields are formatted on this page.

How to Find this page

Follow the steps to create a new or existing field on the Add Field page.

How 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

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** check box 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.

Batch Adding Metadata Template Attribute Options

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.

How to Batch Add Attribute Options

1. Click **Metadata Templates** from the **Tools** menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Attributes page appears.
3. Select one of the following options from the **Add Attribute** drop-down list: **Short String (100 characters)** or **Medium String (255 characters)**.
4. Enter a name for this list of attributes in the **Attribute Name** field.
5. Enter a description for this list of attributes in the **Description** field.
6. Check the **External** check box if these attributes should be displayed as Read-Only.
7. Determine whether or not these attributes are going to be available to other users in the system by choosing **Yes** or **No** for **System Availability**.
8. Click **Submit**.
9. Locate the new attribute on the Attributes page.
10. Select **Options** from the contextual menu for the attribute.
11. Click **Batch Add Options**.
12. Click **Browse** next to the **File Location** field to locate the file to upload.
13. Choose the **Delimiter Type** by clicking one of the following radio buttons: Comma, Tab, or Colon.
14. Click **Submit**. The Add Options: page appears.

### Editing Metadata Templates

**Editing Metadata Templates**

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.

**How to Edit Metadata Templates**

1. Click **Metadata Templates** on the **Tools** menu.
2. Select one of the following options from the contextual menu for the template:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td>Edit the Name and Description of this template.</td>
</tr>
<tr>
<td><strong>Form Design</strong></td>
<td>Edit the fields, labels, and organization of this form.</td>
</tr>
<tr>
<td><strong>Availability</strong></td>
<td>Edit the availability of this template.</td>
</tr>
</tbody>
</table>

**Editing Metadata Template Properties**

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.

**How to Edit Metadata Template Properties**

1. Click **Metadata Templates** from the **Tools** menu.
2. Select **Edit** from the contextual menu for the appropriate template.
3. Edit the **Page Header** (required field), **Form Name** (required field), and **Description** fields.
4. Click **Submit**.
Editing Metadata Template Availability

Librarians and other users can control the usage of metadata templates by making them available to a select group of content management users. Content Collection 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.

How to Edit Metadata Template Availability

1. Click Metadata Templates from the Tools menu.
2. Select Availability from the contextual menu for the template to be edited.
3. Choose Yes to make the template available throughout the entire system.
4. Choose All Folders or Selected Folders and All Subfolders to control the availability of the template at the directory level.
5. Click Browse to select the folders and subfolders if Selected Folders and All Subfolders is selected.
6. Click Add Metadata Form to Add Item page to display the Metadata form on the Add Item and Add Folder pages.
7. Click Submit.

   Note: 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.

Editing Metadata Template Forms

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

How to Edit Metadata Template Forms

1. Click Metadata Templates from the Tools menu.
2. Select Form Design from the contextual menu for the template to be edited.
3. Click Edit for the appropriate form element.

The following changes can be made:

<table>
<thead>
<tr>
<th>To...</th>
<th>Do...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add instructions to the existing metadata template</td>
<td>Select Instructions from the Add drop-down list.</td>
</tr>
<tr>
<td>Add a step header to the existing metadata template</td>
<td>Select Step Header from the Add drop-down list.</td>
</tr>
<tr>
<td>Add individual fields to the existing metadata template</td>
<td>Select Field from the Add drop-down list.</td>
</tr>
</tbody>
</table>
To... | Do...
---|---
Delete individual fields from the existing metadata template | Click the check boxes next to the fields and click **Delete**.
Preview the existing metadata template | Click **Preview**. The metadata template appears in a separate window.

How Metadata Template Elements Are Arranged

<table>
<thead>
<tr>
<th>Form Elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions</td>
<td>The instructions appear at the top of the metadata template page.</td>
</tr>
<tr>
<td>Step Header</td>
<td>The step header is a graphical break in a metadata template, which is used for logical grouping of data entry fields.</td>
</tr>
<tr>
<td>Individual Fields</td>
<td>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.</td>
</tr>
</tbody>
</table>

Fields

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Required?</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit Page Instructions</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 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. |
| **Edit Step Header** | | |
| 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. |
| **Edit Field** | | |
| 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.  
* Text area* produces a text field.  
* Text Editor* produces a Text Editor where text can be entered and formatted. |
Managing Metadata Attributes

Managing Metadata Attributes

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: Goals must be designated as public in outcomes assessment before they can be aligned with Content Collection items. The attribute is named Goals.

How to Manage Metadata Attributes

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

The Manage Attributes page includes the following functions:

<table>
<thead>
<tr>
<th>To...</th>
<th>Click...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a new attribute</td>
<td>An attribute type from the Adding Metadata Attributes drop-down list.</td>
</tr>
<tr>
<td>Edit an existing attribute</td>
<td>Edit from the contextual menu for the appropriate attribute.</td>
</tr>
<tr>
<td>Search for an attribute</td>
<td>Use the Display fields to search for an attribute:</td>
</tr>
<tr>
<td></td>
<td>- Whether or not an attribute is Available.</td>
</tr>
<tr>
<td></td>
<td>- Whether or not an attribute contains a particular Value Type.</td>
</tr>
<tr>
<td></td>
<td>- The External status.</td>
</tr>
<tr>
<td></td>
<td>- By Name, ID, or Description that Contains/Starts with/Equals to search text.</td>
</tr>
</tbody>
</table>
Managing Metadata Attributes

To... | Click...
---|---
Display more attributes | Click **Edit Paging** and enter the number of items per page. Here are some guidelines for Paging Options:  
- The default is 25 items displayed per page.  
- Clicking **Show All** displays all items and makes the other controls disappear.  
- Only numerals are allowed in the Items per page field.  
- If the number entered in the Items per page field is greater than the total number of items then all items are displayed.  
- If the number entered in the Items per page field is less than one then no items are displayed.

Delete an attribute | Select **Delete** from the contextual menu.

Adding Metadata Attributes

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

How to Add an Attribute

1. Click **Metadata Templates** from the **Tools** menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Attributes page appears.
3. Select a type of attribute from the **Add Attribute** drop-down list.
4. Provide information in the following fields and click **Submit** when finished.

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

Editing Metadata Attributes

Librarians can edit attributes to suit their needs and the needs of the Institution.

How to Edit Attributes

1. Click **Metadata Templates** from the **Tools** menu.
2. Click **Manage Attributes**.
3. Select **Edit** from the contextual menu for the attribute to edit.
4. Make changes to the following fields and click **Submit** when finished:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attribute Information</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value Type</td>
<td>Read Only</td>
<td>This field is filled with the type of attribute selected on the Manage Attributes page.</td>
</tr>
<tr>
<td>Attribute Name</td>
<td>Yes</td>
<td>The name of the attribute; identify the intended use of this field.</td>
</tr>
<tr>
<td>Description</td>
<td>No</td>
<td>The description is displayed in the instructions for the attribute.</td>
</tr>
<tr>
<td><strong>Attribute Usage</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>External</td>
<td>No</td>
<td>Librarians can mark attributes as external, meaning that the values are derived from an external source.</td>
</tr>
<tr>
<td><strong>Availability</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Availability</td>
<td>No</td>
<td>Librarians can make attributes available or unavailable in the system.</td>
</tr>
</tbody>
</table>

**Deleting Metadata Attributes**

Librarians can remove custom metadata attributes from the system.

**How to Delete an Attribute**

1. Click **Metadata Templates** from the **Tools** menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Attributes page appears.
3. Select **Delete** from the contextual menu for the attribute.

**Search for Metadata Attributes**

There are many existing attributes in Content Management. 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.

**How to Search for Attributes**

1. Click **Metadata Templates** from the **Tools** menu. The Metadata Templates page appears.
2. Click **Manage Attributes**. The Manage Attributes page appears.
3. Make changes to the following fields and then click **Go** to search:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>The availability status. Search for All, Yes, or No.</td>
</tr>
<tr>
<td>Value Type</td>
<td>The type of attribute to search for.</td>
</tr>
<tr>
<td>External</td>
<td>The Read Only characteristic of the attribute. Search for All, Yes, or No.</td>
</tr>
<tr>
<td>And</td>
<td>Use these three fields for text searches:</td>
</tr>
<tr>
<td></td>
<td>• Name, ID, Description</td>
</tr>
<tr>
<td></td>
<td>• Contains, Starts with, Equals To</td>
</tr>
<tr>
<td></td>
<td>• Text to search for</td>
</tr>
</tbody>
</table>
Search

About Searching Content

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.

Search quickly from the Search 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 and Item 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 wildcard 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 wildcard 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 "I" 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"
Performing a 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 includes two search fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Metadata, File Name, or Folder Name</strong></td>
<td></td>
</tr>
<tr>
<td>From the drop-down menu, select <strong>Contains</strong> to search for all items that contain the criteria entered or select <strong>Equals</strong> to search for all items that exactly match what you have entered.</td>
<td></td>
</tr>
<tr>
<td>Enter text to search for in the Content Collection. This field searches the names of metadata, files, and folders loaded in the Content Collection.</td>
<td></td>
</tr>
<tr>
<td>The file types searched are:.doc,.xls,.ppt,.pdf (excluding encrypted pdf files),.html,.htm,.rtf,.txt.</td>
<td></td>
</tr>
<tr>
<td>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 administrator). This is known as a wildcard search.</td>
<td></td>
</tr>
<tr>
<td>Partial word searches are allowed (typing part of a word as opposed to the whole word, for example, 'enviro' instead of 'environment').</td>
<td></td>
</tr>
<tr>
<td>A single character wild card search may be performed by using the &quot;<em>&quot; 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, &quot;te</em>t&quot;.</td>
<td></td>
</tr>
<tr>
<td>A multiple character wild card search may be performed by using the &quot;*&quot; 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, &quot;test&quot;.</td>
<td></td>
</tr>
<tr>
<td>Fuzzy searches may be done using the tilde, &quot;<del>&quot;, symbol. For example, to search for a term similar in spelling to &quot;roam&quot;, enter &quot;roam</del>&quot; in the search field.</td>
<td></td>
</tr>
<tr>
<td>Users may search for words within a certain proximity to one another using the tilde, &quot;<del>&quot;, symbol. For example, to search for &quot;test&quot; and &quot;history&quot; within 10 words of each other in a document use the search: &quot;test history</del>10.</td>
<td></td>
</tr>
<tr>
<td><strong>Search File Contents</strong></td>
<td>Select this check box to search through the contents of the files themselves.</td>
</tr>
</tbody>
</table>

Performing an Advanced Search

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

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

Search Criteria

- **Search File Contents**: Searching File Contents is the same search option provided in the Basic Search. If a file contains criteria entered in the search field, the file is produced in the results.
- **Search File Comments**: If a file has comments on it that meet the search criteria entered in the search field, the file is produced 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.

*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.

Alignments

Search for content by goals alignments. Select Any or All selected goals or Browse Goals.

Metadata

Type any known metadata in the fields provided.

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.

Searching Portfolios

The Portfolio Search page is accessible from the Search Content Panel. 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 available only if the administrator enables Portfolios.
Portfolio Search Fields

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio Usernames</td>
<td>Enter one or more usernames, or use Browse to search for users. Portfolios created by that user(s) that have been shared to you are displayed.</td>
</tr>
<tr>
<td>Name or Description</td>
<td>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 (the words do not have to appear in both) in that particular order. Portfolios matching the search criteria that have been shared to you are displayed.</td>
</tr>
<tr>
<td>Learning Objectives</td>
<td>Type 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.</td>
</tr>
<tr>
<td>Save Search as</td>
<td>Type a Search Name in the Save Search as field, then click Submit. The search is automatically saved and accessible from the Saved Searches page.</td>
</tr>
</tbody>
</table>

How to Save this Search

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

Portfolio Search Results

Results 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

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 edited. Write permission on a folder allows the user to add files or folders.
- If a user has Delete permission, it can be deleted.
- If a user has Manage permission, item properties such as metadata and comments may be edited 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.

<table>
<thead>
<tr>
<th>To . . .</th>
<th>click . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>copy an item</td>
<td>the check box next to the item to copy and select <strong>Copy</strong>. The Copy an Item page appears.</td>
</tr>
<tr>
<td>move an item</td>
<td>the check box next to the item to move and select <strong>Move</strong>. The Move an Item page appears.</td>
</tr>
<tr>
<td>remove an item from the search results</td>
<td>the check box next to the items to delete and select <strong>Delete</strong>.</td>
</tr>
<tr>
<td>save the search</td>
<td><strong>Save Search</strong>. The Save Search page appears; enter a name for the search on this page.</td>
</tr>
<tr>
<td>add a Workflow to an item</td>
<td>the item and click <strong>Start Workflow</strong>.</td>
</tr>
<tr>
<td>email an item</td>
<td>the item and click <strong>Email Items</strong>.</td>
</tr>
<tr>
<td>download and item</td>
<td>the item and click <strong>Download Package</strong>.</td>
</tr>
<tr>
<td>Bookmark an item</td>
<td>the item and click <strong>Bookmark Items</strong>.</td>
</tr>
</tbody>
</table>

Saving 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 content management 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.
How to Re-run a 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.

How to Edit the Search

From the contextual menu next to the search click *Edit* 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 edited from there. Edit any criteria and click Submit.

How to Share Saved Searches

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

1. From the Search Content Panel, click *Saved Searches*. The Saved Searches page appears.
2. Click the entry in the *Search URL* 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.

How to Delete the Search

From the contextual menu next to the Saved Search select *Delete*.

Discovering Reusable Objects Content

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

The Grade Center and Discussion Boards work slightly different than Content Collection items.

How to Find this Page

1. Turn *Edit Mode* ON.
2. Access a Content Area from within a Course.
3. Click the *Discover Content* button to display the *Learning Objects* window.
How to 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 Searching from the Tools menu

The Quick Search field is located in the Search Content Panel on 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.
Portfolios

About Portfolios

Portfolios collect and organize pieces of work completed over time. They are compilations of work with a general purpose or goal to showcase progress and achievement. Users are given tools to present their information in a cohesive, personalized format.

There are three types of Portfolios:

<table>
<thead>
<tr>
<th>Portfolio Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Portfolios</td>
<td>Personal Portfolios feature tools for personalizing the Portfolio’s style. Users are able to personalize colors, fonts, background images, and overall content layout. The content presented in a Personal Portfolio is created through the use of Artifacts. Portfolio templates can be used when creating a personal 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). Designing a template requires administrator privileges.</td>
</tr>
<tr>
<td>Basic Portfolios</td>
<td>Basic Portfolios serve as a simple tool for quickly creating a Portfolio. Basic Portfolios do not use Artifacts during creation, making it more difficult to reuse content between portfolios. Administrators have the option to turn off Basic Portfolios, so they may not be available.</td>
</tr>
<tr>
<td>Outcomes Portfolios</td>
<td>To create an Outcomes Portfolio, your school must license outcomes assessment. Outcomes Portfolios form a standardized workflow for the review of Portfolios. Outcomes Portfolios are always generated from a template to ensure consistency.</td>
</tr>
</tbody>
</table>

Accessing Portfolios

The Portfolios Homepage displays a user’s Portfolios, Artifacts, and Received Portfolios. This page is accessed by opening the Portfolio menu on the Jump to menu in the Content Collection.

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 in the Content Collection tab or from the My Portfolios portal module which may appear on other tabs.

Click a portfolio name to view it. Portfolio names are displayed as hyperlinks. The portfolio will open in a new tab or window depending on the browser settings.
Portfolio Search

Portfolio Search returns a list of portfolios. It can search by username (the portfolio owner), title, description, and learning objectives. The resulting list includes information on the portfolio type, availability, and links to comments and portfolio settings. The search will only return the portfolios that you have permissions to see. Portfolio search is available from the Search Content menu in the Content Collection.
Differences between Personal and Basic Portfolios

Basic and Personal Portfolios have a few differences that you need to be aware of before you begin. Understanding the differences between the two types of Portfolios will help you choose the best option.

Use the table below to decide which Portfolio offers the best features for your project.

<table>
<thead>
<tr>
<th>Available Features</th>
<th>Basic Portfolios</th>
<th>Personal Portfolios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Artifacts</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Add Content Collection Items</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Design Button Style</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Design Background Style</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Design Page Layout</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>View, Share, and Add Comments</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Define Title and Heading Fonts</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Set Project Status</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Organize Pages by Drag and Drop Page Reordering</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Organize Pages by Keyboard Accessible Reordering</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Ability to Preview the Portfolio</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Working with Artifacts

Artifacts are pieces of content that can be uploaded to a Personal Portfolio. Using Artifacts allows you to reuse content within Blackboard Learn. Artifacts are accessed from the Portfolios Homepage.
Depending on the goal of the portfolio, examples of Artifacts can include resumes, awards, writing samples or other pieces of work.

**Note:** Basic Portfolios do not use Artifacts.

Artifacts can contain the following elements:

<table>
<thead>
<tr>
<th>Artifact Elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Collection Items</td>
<td>Artifacts can link to an item in the Content Collection. Using Content Collection Items link an item to an Artifact. Any changes made to a Content Collection Item will be reflected automatically in any Artifact that uses that Item. Re-uploading Content Collection Items to a Personal Portfolio is unnecessary.</td>
</tr>
<tr>
<td>Attached Files</td>
<td>Artifacts can include files uploaded from your computer. If you have a file that will be updated, add it to the Content Collection before using it in an Artifact. In some cases, artifacts will be predefined and force you to upload a file.</td>
</tr>
<tr>
<td>Text and Images</td>
<td>Text and images can be entered as an Artifact or used to introduce or support an attached file or link to a Content Collection item. The text can supplement the information provided in the Description. Using text and images helps transition between sections and describe attached files or items.</td>
</tr>
</tbody>
</table>
How to Create an Artifact

1. Access the Content Collection.
2. From the Jump to… menu, within the Portfolios section, click Personal Artifacts.
3. Click Create Personal Artifact.
4. Provide a Name and Description for the Artifact. The description will appear in the list of Artifacts to help identify it. The description will NOT appear when the Artifact is used in a Portfolio.
5. Define the Artifact content using the Text Editor. Use the options for uploading files or linking to Content Collection items to add content to the Artifact. To provide a description that will display in the portfolio, enter text in the Content section Text Editor.

6. Click Submit.

Creating Personal Portfolios

Before you begin creating a personal portfolio take some time to set a goal for the Portfolio and think about the point you want to make. Create an outline of the points to highlight in your Portfolio. Make sure that each point has sufficient supporting material and is presented in a clear and concise manner. If your instructor created a portfolio template for you to complete, follow the directions and guidelines.

About the Process

Creating a Personal Portfolio is a multi-step process. Content is added to a personal portfolio by using Artifacts. Artifacts link to Content Collection items. Artifacts can be created before or during the portfolio creation process. If you have a good outline of what you want to accomplish, create Artifacts before moving on to create the portfolio.

Once all the Artifacts are ready, you will create a shell for the portfolio. This includes a name and description. The description will be used for your own organizational needs. After the shell is created, build out the portfolio and add pages and content. The Edit Personal Portfolio page lists your progress for each step. You can edit properties, style, pages, and settings from the Edit Personal Portfolio page.

Creating a Personal Portfolio includes the following steps:

1. Create a portfolio.
2. Design the appearance.
3. Add pages and Artifacts.
4. Determine the settings.

Note: You can create portfolios from a template set by your instructor, or you can create a new portfolio. This option is available from the Create Personal Portfolio page.
How to Create a Personal Portfolio from a Template

1. On the Portfolios Homepage, click My Portfolios.

2. Click Create Personal Portfolio.

3. In the Select Method section, select an existing template to apply.

4. Click Save and Continue to move to the next step. Click Submit to return to the Edit Portfolio page.
How to Create a New Personal Portfolio

1. On the Portfolios Homepage, click My Portfolios.

2. Click Create Personal Portfolio.
3. On the Create Personal Portfolio page, in the Select Method section, select Create New.

4. Provide a Title and Description. The Description of the portfolio is available to the user and will not display in the portfolio. The title will appear on the web browser’s window or tab.

5. Click Save and Continue to move to the next step. Click Submit to return to the Edit Personal Portfolio page.

How to Design the Appearance of the Portfolio

Personal Portfolios created from a template already have a defined style and it is not necessary to edit that style. In this case, be aware that some or all of the Portfolio style options may be locked.

Style options available are Layout, Background, Fonts, and Navigation Menu.
1. Select the **Layout Theme**. The layout determines the position of the navigation menu.

   ![Layout Options]

2. Select the **Design Background**. Select a color and an image for the background of the portfolio.

   ![Design Background Options]

3. Select the **Font Settings**. Options are available to set a default font, page title font, and page heading font. Customizations are available for font type, size, and color.

   ![Font Settings Options]
4. Select the **Style Navigation Menu**. Select **Text** or **Buttons** for the menu links. The text and buttons can be customized by font and color.

### 4. Style Navigation Menu

<table>
<thead>
<tr>
<th>Preview</th>
<th>Menu Item 1</th>
<th>Menu Item 2</th>
<th>Menu Item 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Style</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Text</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Buttons</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Menu Font</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use Template Defaults</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customize Navigation Menu Font</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Background Color</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pale Violet Yellow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Font</td>
<td>Tahoma</td>
<td>12</td>
<td>Violet/Pale Violet-Blue</td>
</tr>
</tbody>
</table>

5. Once the style has been customized, designate a status by selecting **Mark step as in progress** or **Mark step as complete**. Then click **Save and Continue**. Click **Submit** to return to the **Edit Personal Portfolio** page.

### 5. Next Step

- **Mark step as in progress**
- **Mark step as complete**

[Save and Continue]

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**How to Build the Portfolio**

Pages within Personal Portfolios are made up of Artifacts, text, and images. When using a template, the pages may already exist and users may not be able to add or delete pages.

Follow these steps to add a page to a portfolio and add Artifacts to a page.

1. From within the **Build** tab on the **Edit Personal Portfolio** page, click **Create Page**.
2. Provide a **Title** and **Description** for the page. The description is available to the user to organize all the portfolio pages. The description of the page will NOT display in the portfolio.
3. Click **Browse** to search for an existing **Artifact**.
4. Click **Create New Artifact** to create an Artifact and add it to the page.
5. After browsing or creating a new artifact, click **Submit**.
6. Create as many pages and Artifacts to build out your portfolio. The drag-and-drop function is available to reorder pages after they are created.
7. Click the Action Link next to the **Header** or **Footer** to add an image or text in these fields.
8. Once all the pages are complete, designate a status by selecting **Mark step as in progress** or **Mark step as complete**.
9. Click **Save and Continue** or click **Submit** to return to the **Edit Personal Portfolio** page.
How to Designate Portfolio Settings

1. From the Settings tab on the Edit Portfolio page, select a Status for the portfolio. Select Complete if the portfolio is finished and ready to display to reviewers.

2. Select the Share Portfolio Settings. Select Available if you want to share the portfolio with others. If a portfolio is marked as Available, users can find your portfolio in the Portfolio Search.

3. Select Comments are Private to hide comments from users who can view the portfolio.

4. Designate a status for the settings by selecting Mark step as in progress or Mark step as complete.

5. Click Submit to return to the Edit Personal Portfolio page. Clicking Submit will not automatically make your portfolio available to be shared with others unless you have selected this option.
Managing Personal Portfolios

Users can manage options for a personal portfolio on the **Edit Personal Portfolio** page. Access the Edit Personal Portfolio page by clicking **My Portfolios** on the **Portfolios Homepage**. Click the Action Link next to a Portfolio name and click **Edit**.

### Portfolio Status
- **Complete**: Complete

### Share Portfolio Settings
- **Available**: Available
- **Comments are Private**: Comments are Private

### Next Step
1. **Mark step as in progress**
2. **Mark step as complete**

[Image of the Edit Personal Portfolio page]

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The following options are available:

- Edit Portfolio
- Share Portfolio
- Comments
- Portfolio to Go

How to Edit a Portfolio

Editing options are displayed as links to access each step of the portfolio creation process. The portfolio properties are listed as links marked with icons indicating their status, either in progress or complete.
How to Share a Portfolio

A portfolio can be shared with anyone inside or outside your institution with an email account and access to the Internet. A portfolio must be made available before it can be shared with anyone. Edit the settings of the portfolio to access the availability option. All users with whom a Portfolio is shared have the ability to find it using the Portfolio Search.

Use the following table to determine which sharing option to choose.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What Happens?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blackboard Learn Users</td>
<td>The Portfolio is listed in the user's Received Personal Portfolios.</td>
</tr>
<tr>
<td>External Users</td>
<td>A URL is created and emailed to the specified users to access your Portfolio.</td>
</tr>
<tr>
<td>Courses or Organizations</td>
<td>The Portfolio is listed in the Portfolios tool in the Course or Organization. Members of those Courses and Organizations can search for your Portfolios.</td>
</tr>
</tbody>
</table>
3. Click **Share Portfolio**.

4. On the Action Bar, point to **Share with** and select one of the available options. Options include: **Users**, **External Users**, **Courses**, **Organizations**, **Institution Roles**, and **All System Accounts**. Sharing your portfolio with users or external users will open an email form. If you share your portfolio with courses or organizations you will need to browse for the course or organization. If you chose to share with specific roles, you will select the roles from a list. Sharing with all system accounts requires you to confirm your action.
5. Complete the form on the page that appears after you select the specific user type.
6. Click Submit to share your portfolio.
How to Manage Comments

Comments are used to provide feedback from peers and instructors. The Comments page includes columns displaying the date posted, the author who posted the comment, and the comment text. The comment subject is displayed as a hyperlink, clicking the link will open the comment text below the subject. Comments can be sorted by clicking the column title link.

Comments are viewed, added, and deleted from this page. Only the comment author may delete a comment.

1. On the Portfolios Homepage click **My Portfolios**.
2. Click the Action Link next to a portfolio name and click **Edit**.

<table>
<thead>
<tr>
<th>Choose Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
</tr>
<tr>
<td>Browse</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
</tr>
<tr>
<td>Casey Owens has shared a Portfolio with you</td>
</tr>
<tr>
<td>Message</td>
</tr>
<tr>
<td>Casey Owens has invited you to view the Portfolio: Casey's Portfolio</td>
</tr>
<tr>
<td>To view the Portfolio, login to Blackboard and go to 'Received Portfolios'</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
</tr>
<tr>
<td>Cancel</td>
</tr>
</tbody>
</table>
3. Click **Comments** to view any comments on your portfolio.
How to Package and Download a Portfolio

Packaging your portfolio in a zip file allows you to store and move your portfolio on your personal computer. Any personal portfolio and its contents may be downloaded as a compressed zip file. 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.

1. On the Portfolios Homepage click My Portfolios.
2. Click the Action Link next to a portfolio name and click Edit.
3. Click **Package the Portfolio**.

4. Click **Download**. A pop-up window appears with options to open or save the personal portfolio.
5. Click **Save**, and choose a desired location.
Creating Basic Portfolios

Take some time to set a goal for the Portfolio and think about the point you want to make. Create an outline of the points to highlight in your Portfolio. Make sure that each point has sufficient supporting material and is presented in a clear and concise manner.

Creating a Basic Portfolio is a two step process. First, you must create the portfolio. The first step creates a shell for your portfolio. Once you have named and designed your portfolio, you will need to build it. Within the build process there are three types of materials that you can add to your portfolio: Content, Links, and Items.

About Basic Portfolio Item Permissions

When you are adding content collection items to your portfolio you need to be aware of the permissions on those items. Any content collection item in your portfolio must have Read permission for users to be able to view it. To help with organization, create a specific folder for your portfolio items and set the permissions at the folder level to Read.

How to Create a Portfolio

Creating a Basic Portfolio creates the shell for the all the materials that you will add to it in the next steps.

Windows users should double-click the zip file and select Extract. Macintosh users should double-click the zip file. Open the file named index.html to view the portfolio. Be aware that if buttons are used for portfolio menu navigation, the buttons will be replaced with text links.
1. On the Portfolios Homepage click My Portfolios.

2. On the Action Bar click Create Basic Portfolio.

3. Provide a Title, Description, and Learning Objective. The description is available to the user to organize multiple portfolios on the My Portfolios page. The description will not display in the portfolio.
4. Choose a **Portfolio Menu Style** by selecting a background color, text color, or button design.
5. Set the **Portfolio Availability**. Once a portfolio is set to available, it is searchable from the Portfolio Search.
6. Set the **Comments Options**. Private comments are only viewable by the portfolio author.
7. Click **Submit**.

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**How to Build a Portfolio**

A good way to start building your portfolio is to create a homepage. Set the tone for your portfolio on this page.
and give the viewer an introduction of what they can expect to see. The best type of content to create for a homepage is an Item.

1. After creating a basic portfolio, access the My Portfolios page.
2. Click the Action Link next to the portfolio title and click Build.

There are three options available on the Action Bar to add material to your portfolio: Content, Links, and Items.

How to Add Content

Adding Content to your Portfolio creates a link to a Content Collection file or folder. Using Content Collection
Creating Basic Portfolios

Items is one of the most effective ways to present content in a portfolio. Any changes made to Content Collection items will be reflected automatically wherever the item is located. Re-uploading content is unnecessary.

1. After creating a basic portfolio, access the My Portfolios page.
2. Click the Action Link next to the portfolio title and click Build.

3. Click Add Content.

4. Provide a Menu Item Name. This name will appear as the text on the navigation menu in your portfolio.
5. **Browse** for an item or folder from the Content Collection.
6. Set the **Availability** of the item.
7. Click **Submit**.

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**How to Add Links**

Links are external content that you can apply to your Portfolio. Adding a link will open the website within the page in your portfolio. This can be helpful if you want to link to an online resume or a blog for a group project.

1. After creating a basic portfolio, access the **My Portfolios** page.
2. Click the Action Link next to the portfolio title and click **Build**.
3. Click **Add Link**.

4. Provide a **Menu Item Name**. This name will appear as the text on the navigation menu in your portfolio.

5. Specify the **URL** for the link.

6. Set the **Availability** for the item.

7. Click **Submit**.
How to Create Items

Items are used to create any other type of content you want to display in your portfolio. Items are created based on a template. Templates are created by the administrator. If none are created or made available, this option will not appear.

1. After creating a basic portfolio, access the My Portfolios page.
2. Click the Action Link next to the portfolio title and click Build.
3. Click **Create Item**.

4. Select a **Template** and click **Submit**.
5. **Provide a Menu Item Name.** This name will appear as the text on the navigation menu in your portfolio.

6. **Use the Text Editor to create an item.** You can add text, pictures, or mashups to your item.

7. **Set the Availability** for the item.

8. **Click Submit.**
How to Order Portfolio Pages

Portfolio Content is displayed in the order in which it is created. The content position is displayed next to the item in a drop-down list. If you want to change the location of the item, select the corresponding number in the order you want it to appear. The page will automatically refresh and shift the other items according to the new order.
Managing Basic Portfolios

Basic portfolios are managed from the My Portfolios page. All the options to manage a basic portfolio are accessed by opening the contextual menu for the portfolio. Portfolios can be edited during any time of the creation process.

How to Edit a Portfolio

Selecting Edit will open the main portfolio properties, such as the title, description, and style options.

1. On the Jump to menu under Portfolios, click My Portfolios.
2. Click the Action Link next to a Basic Portfolio title and click Edit.
How to Build a Portfolio

Selecting **Build** will open the content options for adding more information to your portfolio. Options include Add Content, Add Link, and Create Item.

1. On the **Portfolios Homepage** click **My Portfolios**.
2. Click the Action Link next to a Basic Portfolio title and click **Build**.
For more information on building a portfolio see How to Build a Portfolio.

How to Manage Comments

Comments are used to provide feedback from peers and instructors. The Comments page includes columns displaying the date posted, the author who posted the comment, and the comment text. The comment subject is displayed as a hyperlink, clicking the link will open the comment text below the subject. Comments can be sorted by clicking the column title link.

1. On the Jump to menu under Portfolios, click My Portfolios.
2. Click the Action Link next to a portfolio name and click Comments to view any comments on your portfolio.
3. Click the hyperlink of the comment subject to open the comment text.
How to Download a Portfolio

Any basic portfolio and its contents may be downloaded as a compressed zip file. 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.

Basic portfolios must contain content to be downloaded. If a basic portfolio is empty, the link to download will not appear.

1. On the Portfolios Homepage click **My Portfolios**.
2. Click the Action Link next to a portfolio name and click **Download**.
3. Click the **Click to download Portfolio** link. A window appears with options to open or save the Basic Portfolio.
4. Select **Save File**, and save the basic portfolio to the desired location.

The portfolio is contained in a zip file. To view the portfolio, Windows users should double-click the zip file and select **Extract**. Macintosh users should double-click the zip file. Open the file named **index.html** to view. If buttons are used in the portfolio menu, they will become text links in the downloaded portfolio.

### How to Share a Portfolio

Portfolios can be shared with anyone with an email account and access to the Internet. Sharing a portfolio is an effective method for displaying your work to colleagues at other schools or even potential employers.

Use the following table to determine which sharing option to choose.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What Happens?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blackboard Learn Users</td>
<td>The Portfolio is listed in the user's Received Personal Portfolios.</td>
</tr>
<tr>
<td>External Users</td>
<td>A URL is created and emailed to the specified users to access your Portfolio.</td>
</tr>
<tr>
<td>Courses or Organizations</td>
<td>The Portfolio is listed in the Portfolios tool in the Course or Organization. Members of those Courses and Organizations can search for your Portfolios.</td>
</tr>
<tr>
<td>Institution roles</td>
<td>All users with that role may search for your Portfolio.</td>
</tr>
<tr>
<td>All System Accounts</td>
<td>Any user on the system may search for your Portfolio.</td>
</tr>
</tbody>
</table>

Shared portfolios between Blackboard Learn users will not display in **Received Portfolios** until the receiver refreshes their browser. Access **Received Portfolios** from the **My Portfolios page**. All users with whom a portfolio is shared have the ability to find it using the **Portfolio Search**.
1. On the Jump to menu under Portfolios, click My Portfolios.
2. Click the Action Link next to a basic portfolio and click Share.
3. Point to Share with on the Action Bar and select the set of users to share your portfolio with.
4. Complete the form on the page that follows and click Submit.
How to Run the Link Checker

The Basic Portfolio Link Checker checks 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 a good practice. Links to Content Collection items from a Basic Portfolio may appear broken if identifying properties or permissions to the item are altered. The Link Checker 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, the Link Checker will identify the problem. Depending on the situation, some broken links may be repaired, while others may not.
1. On the Jump to menu under Portfolios, click My Portfolios.
2. Click the Action Link next to the title of a basic portfolio and click Link Checker.

When Link Checker is clicked the task will run automatically. The results appear on the Portfolio Link Checker page.
Understanding the Link Checker Results

After running the Link Checker the results page appears explaining the status of each link to a Content Collection item.

<table>
<thead>
<tr>
<th>Legend</th>
<th>Description and Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td><strong>Valid Link</strong>: These items are linked successfully and do not require any further action.</td>
</tr>
<tr>
<td>🕒</td>
<td><strong>Repairable permissions error</strong>: 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 <strong>Repair</strong>. The system will grant Read permission to these items to users on the Basic Portfolio User List.</td>
</tr>
<tr>
<td>🚨</td>
<td><strong>Path not found</strong>: 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.</td>
</tr>
<tr>
<td>⚠️</td>
<td><strong>Permissions error</strong>: 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. Delete these links from the Basic Portfolio or contact a user with Manage permission to these items to add the appropriate permission. The Blackboard administrator at your school has Manage permissions on all Content Collection items. Administrators will never see this icon after running the tool.</td>
</tr>
</tbody>
</table>

How to Copy a Portfolio

The copy function creates a new Basic Portfolio that is an exact replica of an existing Basic Portfolio. This function is 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.

When a Basic Portfolio is copied, the new Basic Portfolio is not shared to anyone and it may be used for any purpose. If the original Basic Portfolio contains any broken links when copied, the system will notify the user to
run the Link Checker 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.

1. On the Jump to menu under Portfolios, click My Portfolios.
2. Click the Action Link next to the title of a basic portfolio and click Copy.
3. Provide a Destination Portfolio name.
4. To copy the comments from the original portfolio select the check box next to the portfolio name.
5. Click **Submit**.

<table>
<thead>
<tr>
<th><strong>Copy Portfolios</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Portfolio Name</strong></td>
</tr>
<tr>
<td>Provide a name for each portfolio.</td>
</tr>
<tr>
<td>Source Portfolio Name</td>
</tr>
<tr>
<td>Casey's Basic Portfolio</td>
</tr>
<tr>
<td><strong>2. Copy Comments</strong></td>
</tr>
<tr>
<td>Select the source Portfolio if comments should be copied into the destination Portfolio.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>3. Submit</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Tip:** If many basic portfolios need to be created for a similar purpose, it is a good practice to create one basic portfolio that contains the basics and the design and then copy it multiple times for other uses. For example, if a student is preparing a portfolio about their achievements for multiple job interviews, he or she may want to create the design that best represents the work with links to content that demonstrates that achievement. Then, for each interview, the student may copy the basic portfolio and personalize the new one for the specific employer, such as changing the welcome page text to a cover letter. The student can then share the portfolio with the company.

**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.
Learning Objects Catalog

About the Learning Objects Catalog

The Learning Objects Catalog is a repository within the Backboard 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.

About Learning Objects

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

For information about adding entries to the Learning Objects Catalog, see Adding Catalog Entries for Items.

Note: If your school licenses community engagement, the Administrator may choose to make this feature available to all users in the system, or to users with specific roles.

How to Find this Page

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

The Learning Objects page includes the following functions.

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.

Adding Catalog Entries for Items

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.

To learn more, see About the Learning Objects Catalog.

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

How to Add a Catalog Entry

1. Navigate to the folder that contains the item to be edited.
2. Select Create Catalog Entry from the contextual menu for the item.
3. Enter information in the following fields and click Submit.
**Note:** The information in the Description section is pulled from the General Metadata. Information edited 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.

## Managing Catalog Categories

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.

**Note:** If your school licenses community engagement, 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.

### How to Manage Catalog Categories

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

The Manage Catalog Categories page includes the following functions.

<table>
<thead>
<tr>
<th>To . . .</th>
<th>Click . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>add a top-level category to the catalog</td>
<td><strong>Create Catalog Categories</strong>. The Create Category page will open. Enter the name of the category on this page.</td>
</tr>
<tr>
<td>add a subcategory to an existing category</td>
<td>the name of the category. This opens a page containing the subcategories and options for adding and managing them.</td>
</tr>
<tr>
<td>change an existing category</td>
<td><strong>Edit</strong> next to the category name. The Edit Category page appears.</td>
</tr>
<tr>
<td>remove a category</td>
<td>select the check box next to the categories to remove and click <strong>Delete</strong>. This action will remove the category and all subcategories. All items in these categories will be moved to a system-created category called &quot;Uncategorized.&quot; The Administrator may rename this category.</td>
</tr>
</tbody>
</table>

## Managing Catalog Entries

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 you also license community engagement, 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.
### How to Manage Catalog Entries

1. Select **Manage Catalog** under the Learning Objects menu.
2. Select **Manage Catalog Entries**.
   - or -
   Select **Manage Catalog Entries** from the contextual menu for a specific folder.

The **Manage Catalog Entries** page includes the following functions.

<table>
<thead>
<tr>
<th>To . . .</th>
<th>click…</th>
</tr>
</thead>
<tbody>
<tr>
<td>approve catalog entries</td>
<td>the check boxes next to those entries to approve and select <strong>Approve</strong>. These items are added to the catalog.</td>
</tr>
<tr>
<td>reject catalog entries</td>
<td>the check boxes next to those entries to reject and select <strong>Reject</strong>. These items are not added to the catalog. If the items were approved before, they will no longer appear in the Catalog.</td>
</tr>
<tr>
<td>delete a catalog entry</td>
<td>the check boxes next to those entries to approve and select <strong>Delete from Catalog</strong>. These items are removed from this page and will not appear in the catalog. This action is permanent; the item is deleted 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.</td>
</tr>
<tr>
<td>filter by the status of the entries</td>
<td>the drop-down list in the <strong>Status</strong> field and select which entries to view. The following options are available: &lt;ul&gt;&lt;li&gt;<strong>Show All</strong> – Displays all entries, including approved, pending and rejected&lt;/li&gt;&lt;li&gt;<strong>Pending</strong> – Displays only entries that are pending&lt;/li&gt;&lt;li&gt;<strong>Approved</strong> – Displays only entries that have been approved&lt;/li&gt;&lt;li&gt;<strong>Rejected</strong> – Displays only entries that are rejected.&lt;/li&gt;&lt;/ul&gt;</td>
</tr>
<tr>
<td>filter by catalog category</td>
<td>the drop-down list in the <strong>Category</strong> field and select which entries to view. By default, the filter shows all categories.</td>
</tr>
</tbody>
</table>
Group Collaboration

About Group Collaboration

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.

Creating a Group Folder

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 function in Blackboard Learn. 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.

How 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. Click Create Folder in the Action Bar.
3. Enter a Folder Name.
4. Enter a value in the Quota in Megabytes field.
5. Choose a Lock Option.
6. Choose a Comment Option.
7. Choose a Version Option.
8. Choose a Tracking Option.
9. Choose a Metadata Option.
10. Click Submit.

Sharing a Group Folder

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

How to Share a Folder with a Course Group

1. Select Permissions next to the group folder. If Permissions is not visible, select Edit, then Permissions.
2. From the drop-down list in the Action Bar, Select **Group User List** (or **Organization Group User List** if the Group belongs to an Organization). Select **Go**.

3. The page displays all Course Groups in which the user is enrolled. Select the check box next the Group name with which to share the folder. Multiple Groups may be selected.

4. Select the appropriate permission check boxes. To grant the group full permissions, select all of the check boxes.

**How to Share a Folder with a User Group**

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

1. Select **Permissions** next to the folder. If Permissions is not visible, select **Edit**, then **Permissions**.

2. Select **Add Users** in the Action Bar.

3. Enter the username of each group member, separated by commas, in the **Choose Users** field. Click **Browse** to locate unknown usernames.

4. Select the appropriate permission check boxes for these users. To grant all members of the group full permissions, select all of the check boxes.

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

**How to Create a Bookmark**

1. From the Jump To Panel under **Tools**, click **Bookmarks**.

2. Click **Create Bookmark**.

3. Enter a **Bookmark Name**.

4. Click **Browse** to locate the item.

5. Click **Submit**.

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, edit, and delete any file or folder within the group folder.

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

**Collaborating on Documents**

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.

To learn more, see Manage Versions of Items.

**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.

To learn more, see About Workflows.

**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.

**How to Lock a Folder and All of its Contents**

1. Open the Content Collection tab and locate the folder to be locked.
2. Select Settings from the contextual menu for the folder name.
3. Click Lock this folder and everything it contains under the Lock Options section.

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 edits a file.
Collaboration

About Collaboration

Content management users can create workflows that define the tasks and order of execution of a specific process, including which documents and individuals are involved. Content management 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 content management users. Sharing these models with the appropriate roles within an Institution can increase efficiency and accuracy.

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.
- Institutions can establish procedures for requesting access to specific Course content.
- Students can use Collaboration to work together on class projects.

Collaboration Splash Page

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.

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

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get Started &amp; Start an Instant Workflow</td>
<td>Click this link to display the Start Workflow page. Use an existing workflow model or start an Instant Workflow.</td>
</tr>
<tr>
<td>My Workflow Progress &amp; the workflows</td>
<td>Click either of these links to display the Workflows page.</td>
</tr>
<tr>
<td>Design Workflow Model &amp; Create a New Model</td>
<td>Click either of these links to display the Create a Workflow Model: My Models page.</td>
</tr>
<tr>
<td>To Do List</td>
<td>Click this link to display the To Do List page.</td>
</tr>
<tr>
<td>Email</td>
<td>Click this link to send email to other workflow participants using the Email Items page.</td>
</tr>
</tbody>
</table>

Creating Workflow Models

About Working with Models

Any Content Management user can create 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.
Workflow models are contained on the Create a Workflow Model: My Models page. This page is accessed in one of two ways:

- Click the **Create a Workflow Model** link from the **Tools** menu.
- Click the **Design Workflow Model** link from the Collaboration splash page.

The Create a Workflow Model: My Models page contains the following functions:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Model</td>
<td>Click to display the <a href="#">Creating a Workflow Model</a> page and create a new model.</td>
</tr>
<tr>
<td>Delete</td>
<td>Click to remove selected workflows.</td>
</tr>
<tr>
<td>Copy</td>
<td>Click to copy selected workflows.</td>
</tr>
</tbody>
</table>
| Display Models    | Choose from the following options and click Go:  
  - All Models  
  - 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 Go to execute the search. |
| Name              | The name of the model. |
| Designer          | The user who created the model. |
| Start             | Click the Start button to start the workflow. |

### Creating a Workflow Model

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

### How to Create a New Workflow Model

1. Click **Collaboration** from the Menu Area.
2. Click **Design Workflow Model**.
3. Click **Create Model**.
4. Enter a name for the model in the **Name** field.
5. 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.)
6. Define the **Action Status** terms to be used in this model: **In Progress**, **Approved**, and **Not Approved**.
7. Click **Browse** to link content items to this model.
8. Add permissions for the item. To learn more, see [Adding Permissions](#).
9. Click **Submit** when finished.
10. Select **Build** from the contextual menu for the newly created workflow.
11. Click **Create Milestone**.
12. Enter a **Name** for the milestone.
13. Enter a **Description** field.
14. Click either **No Action** or **Go to Milestone** and select a milestone number to define the Milestone to repeat if blocked. To learn more, see Adding Milestones.
15. Click **Browse** to link content items to this milestone.
16. Add permissions for the item. To learn more, see Adding Permissions.
17. Click **Add Another File** to add another content item to this milestone.
18. Click **Submit and Add Action** to add an action to this milestone or **Submit and Finish** to go back to the Model Design page. To learn more, see Adding Actions.

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

### Adding Milestones

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.

### How to Add Milestones

1. From the Create a Workflow Model: My Models page, select **Build** from the contextual menu for the workflow.
2. Click **Create Milestone**.
3. Enter a **Name**.
4. Enter a description for the milestone in the **Description** field.
5. Click either **No Action** or **Go to Milestone** and select a milestone number to determine the Milestone to repeat if blocked.

**Note:** The **Milestone to repeat if blocked** setting works as follows:

- **No Action** 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.
- **Go to Milestone** forces the workflow to go back to a specified milestone if this milestone fails. If this milestone fails, all statuses forward from this point revert to **Not Started**. All comment and history information remains intact.

6. Click **Browse** to link content items to this milestone. Repeat this step to add another content item to this milestone.
7. Add permissions to the item. To learn more, see Adding Permissions.
8. Click **Submit and Add Action** to add an action to this milestone or **Submit and Finish** to go back to the Model Design page. For step-by-step instructions, see Adding Actions.

### Adding Actions

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.
How to Access the Add Action 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**.
- Select **Build** from the contextual menu for the appropriate workflow on the Create a Workflow Model: My Models page. Click **Create Action** for the appropriate milestone.

How to Add an Action

1. Enter a name in the **Name** field.
2. Enter a description of this action in the **Description** field.
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 **Browse** to link content items to this action.

   **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 go back to the Model Design page.

Adding Permissions

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 edited 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.
How to Add Permissions

1. From the Add Workflow Model page, click Browse to add an item to the model. To learn more, see Creating a Workflow Model.
2. Select any or all of the following permissions by selecting its check box.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read</td>
<td>Allows a user to read or view this item.</td>
</tr>
<tr>
<td>Write</td>
<td>Allows a user to edit this item.</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows a user to delete this item from the workflow.</td>
</tr>
<tr>
<td>Manage</td>
<td>Allows a user to manage the permissions for the item.</td>
</tr>
</tbody>
</table>

3. Click Submit when finished.

Extending Content Permissions for a Workflow Item

Permissions for items associated with workflows can be extended in order to complete the workflow. Extensions remain in effect after the milestone and workflow are complete.

How to Extend the Permission for a Workflow Item

1. Click Extend Permissions for a Milestone within a Workflow.
2. Click Browse to select the names of users who need extended permission to access an item.
3. Click Browse to link an item from the Content Collection.
4. Add permissions to the item.
5. Click Submit.

Editing a Workflow Model

Once a workflow model is created it can be edited 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 edited but only after they are stopped. Once stopped, the owner can edit any milestone that has not been started and any associated actions.

How to Edit a Workflow Model

1. Click Design Workflow Models.
2. Select Edit, Build, or Share from the contextual menu for the appropriate model.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Click this link to open the Edit page. The name, description, and status labels of a model can be edited there.</td>
</tr>
<tr>
<td>Build</td>
<td>Click this link to open the Model Design page. Milestones and actions may be added or deleted.</td>
</tr>
<tr>
<td>Share</td>
<td>Click this link to open the Workflow Model Sharing page. The settings for sharing the model are located there.</td>
</tr>
</tbody>
</table>
Collaboration - Creating Workflow Models

Sharing Workflow Models

Certain content management users can share workflow models with other users. Users must have permission to share a workflow model based upon their Institution Role.

How to Share a Workflow Model

Follow these steps to share a workflow with other content management users:

1. Select Share from the contextual menu for the appropriate Workflow Model.
2. Click the Yes radio button to share the workflow.
3. 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.
4. 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.
5. Click Submit when finished.

How to Remove a Shared Workflow

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.

1. Select Share from the contextual menu for the appropriate Workflow Model.
2. Click the No radio button to remove the workflow share.
3. Click Submit when finished.

Copying Workflow Models

Content management 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 edit it accordingly.

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

How to Copy a Workflow Model

1. Navigate to the Create a Workflow Model: 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

Content Collection items or files from a local hard drive can be linked to a workflow instance. Content Collection 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.
- 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.

**How to Link Content Collection Items to a Workflow**

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

1. Click **Browse**.
2. Use the **My Content**, **Course Content**, **Organization Content**, and **Institution Content** links to navigate to the appropriate folder.
3. Select the item from the list by clicking its radio button.
4. Click **Submit** when finished.
5. Add permissions for the item. To learn more, see [Adding Permissions](#).

**How to Link Local Items to a Workflow**

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

1. Click **Browse**.
2. Click the **Add Item** button. The Add Item page is displayed.
3. Click **Browse**.
4. Use the File Upload dialog box to locate the local file and then click **Open**.
5. Select the options for this file by clicking the appropriate check boxes.
6. Click **Submit** when finished.
7. Add permissions for the item. To learn more, see [Adding Permissions](#).

**Deploying Workflows**

**Starting a Workflow**

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 Content Collection item and Create a workflow model around it or use an already existing workflow model.

**How to Start a Workflow**

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.
Collaboration - Deploying Workflows

- **Item-Based Workflow**: From any Content Collection folder page, select an item and click **Start Workflow**.

### Creating an Instant Workflow

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

### How to Create a New Workflow

1. Click **Collaboration** from the Menu Area.
2. Click **Start an Instant workflow**.
3. Select **Create Instant Workflow** or **Copy Existing Workflow Model**.
4. Click **Browse** to select the existing Workflow Model.
5. Enter a name for the new workflow in the **Name** field.
6. 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.
7. Define the **Activity Status** terms to be used in this workflow: In Progress, Approved, and Not Approved.
8. Click **Browse** to link content items to this workflow.
9. Click **Submit**.

### Using a Shared Workflow Model

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

### How to Start a New Workflow Based Upon a Shared Workflow

1. From the Collaboration splash page, click the link to a workflow in Get Started or select Make a Request in the Workflow menu.
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. (Optional).
4. Click **Brows** to add an item to this workflow. To learn more, see [Linking Items to a Workflow](#).
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.
   - Click **Browse** to add an item to this workflow. To learn more, see [Linking Items to a Workflow](#).
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.
Creating an Item-Based Workflow

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

How to Create an Item-based Workflow

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

1. From any Content Collection folder page, select an item and click Start Workflow.
2. 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.
3. Click Submit when finished.

Editing an Active Workflow

Content management users can edit any workflow that they own and that is in progress. Milestones and Actions that have not started yet can be edited. Milestones and Actions that are in progress or are already completed may not be edited.

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

How to Edit an Active Workflow

1. Click Design Workflow Model from the Collaboration splash page.
2. Select Open from the contextual menu for the active workflow.
3. Select Create Action or Extend Permissions from the contextual menu for any Milestone.
4. Select Edit, Copy, or Delete from the contextual menu for any Action.
5. Click OK when finished.

Managing Workflow Actions

About Workflows

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, edit, 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.

Using Web Folders or Shared Locations 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 the appropriate permissions for. If the Workflow is on a folder, the user has been granted permission to the folder, and Web Folders may be used. If the Workflow is on a file, the user will not have permissions to the folder the file resides in and Web Folders will not work.

Note: On the Mac, a Web Folder is called a Shared Location.
How to View Workflows

Click **My Workflow Progress** or the **Workflows** link from the Collaboration splash page.

The Workflows page has the following functions.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Users can delete workflow instances that they have created.</td>
</tr>
<tr>
<td>Subscribe</td>
<td>Click to subscribe to selected workflows. The <strong>Workflow Notifications</strong> page appears.</td>
</tr>
<tr>
<td>Display Workflows</td>
<td>Choose from the following display options and click <strong>Go</strong>:</td>
</tr>
<tr>
<td></td>
<td>- <strong>All</strong>: Displays all workflows that are associated with a user.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Sent</strong>: Displays workflows that were initiated by the user.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Received</strong>: Displays workflows that the user is involved with but were initiated by other users.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Scheduled</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td>- <strong>In Progress</strong>: Displays workflows that are in progress.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Complete</strong>: Displays workflows that are completed.</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of the workflow.</td>
</tr>
<tr>
<td>Status Icon</td>
<td>A Status Icon will indicate one of the following: A workflow Milestone is overdue. A subscription to all notifications for that workflow. A subscription to Activity notifications for that workflow.</td>
</tr>
<tr>
<td>Progress</td>
<td>Displays the progress of the workflow.</td>
</tr>
<tr>
<td>Current Milestone Deadline</td>
<td>Displays the deadline of the current milestone of a particular workflow.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Displays the date that the particular workflow began.</td>
</tr>
<tr>
<td>Stop Date</td>
<td>Displays the date that the particular workflow was stopped.</td>
</tr>
<tr>
<td>Type</td>
<td>Displays the type of workflow: <strong>Sent</strong> or <strong>Received</strong>.</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the <strong>Start/Stop</strong> button. Users can click <strong>Start</strong> to begin a workflow instance they have created and <strong>Stop</strong> to stop it. Workflow instances that have been stopped may be restarted by clicking <strong>Start</strong>.</td>
</tr>
<tr>
<td>Edit</td>
<td>Select <strong>Edit</strong> from the contextual menu to display the Workflow Design page for this particular workflow. To learn more, see <strong>Editing an Active Workflow</strong>.</td>
</tr>
<tr>
<td>Edit Paging</td>
<td>Choose how many workflows to display on this page: 25, 50, 100, 200, or <strong>ALL</strong> and click <strong>Go</strong>.</td>
</tr>
</tbody>
</table>

Viewing Model Design Details

The Model Design 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 edit 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.
How to Access the Model Design Page

- Select **Open** from the contextual menu for the appropriate workflow on the Workflows page.
- Select **Open** from the contextual menu for the appropriate action on the Actions page.

The Model Design page contains the following functions:

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

To Do List Actions

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.

How to Access the To Do List

Click **To Do List** from the Collaboration menu.

- or -

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

The Actions page contains the following functions:
### Collaboration

#### Managing Workflow Actions

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

### Updating Actions

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 [Model Design](#) page.

**Note:** Any user involved in the workflow can add comments to actions while only users assigned to an action can edit 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.

### How to Update Actions

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

- Click **Edit** for the appropriate action on the [Actions](#) page.
- Click **Edit Action** for the appropriate action on the [Model Design](#) page.

The Update Action page contains the following functions:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions</td>
<td>Displays the instructions for this action. Read only.</td>
</tr>
<tr>
<td>Deadline</td>
<td>Displays the deadline for this action. Read only.</td>
</tr>
<tr>
<td>Required</td>
<td>Displays the <strong>Required/Not Required</strong> status of the action. Read only.</td>
</tr>
<tr>
<td>Function</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Content Items</td>
<td>Displays the links to any Content Items associated with this action.</td>
</tr>
<tr>
<td>Status</td>
<td>Choose from the following options to change the status of this action:</td>
</tr>
<tr>
<td></td>
<td>- In Progress</td>
</tr>
<tr>
<td></td>
<td>- Approved</td>
</tr>
<tr>
<td></td>
<td>- Not Approved</td>
</tr>
<tr>
<td>Subject</td>
<td>Enter a subject in the field provided.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter a comment related to the change in status.</td>
</tr>
<tr>
<td>Status History</td>
<td>Displays the status history of this action. Use the Expand All and Collapse All buttons to expand or collapse the history data.</td>
</tr>
</tbody>
</table>

**Workflow Notifications**

The Workflow Notifications page allows users to manage the notifications from a particular workflow. The Workflow Notifications page can be accessed by selecting a workflow from the My Workflows page and clicking **Subscribe**. Users can edit the notification settings for one or more workflows at the same time.

**How to Set Notification Preferences**

1. Select one of the following options:
   - **I need to complete an action**: The user receives notifications regarding only the status of milestones within the workflow in which the user has actions to complete, not the overall status of the workflow.
   - **Any events occur**: The user receives all notifications from a workflow, including action and milestone status.
   - **A workflow completes or fails**: The user receives notifications only when a workflow is completed or has failed.
   - **Never**: The user will not receive workflow notifications.

2. Click **Submit**.

**How to Opt-out of Workflow Notifications**

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

1. Under **Tools**, click **Personal Settings**.
2. Select the **Opt out of Workflow Notifications** check box.
3. Click **Submit**.

**Emailing Items**

Users can email files and folders to specific users, a group of users or to anyone with a valid email address from a Content Area.
How to Send an Email

1. Select a file or folder in the Content Area by clicking the appropriate check boxes.
2. Click **Email Items**.
3. Click **To**
4. Choose who to send the email message to:
   - Click **Select Specific Users** to browse for a username. Click **Submit**.
   - Point to **Select Group of Users** to choose a group. Click **Course, Course Group, Organization** or **Organization Group**. Select a group by clicking the appropriate check boxes. Click **Submit**.
   - Click **Add Email Address** to enter an email address. Click **Submit**.
5. Click **Cc** and **Bcc** and choose who to send copies of the email message to. Optional.
6. Enter a subject in the **Subject** field.
7. Enter the message in the **Message** field.
8. Click **Submit**.