EMC® Documentum® CenterStage™

Version 1.2 SP1

User Guide

EMC Corporation
Corporate Headquarters:
Hopkinton, MA 01748-9103
1-508-435-1000
www.EMC.com

Table of Contents

List of Figures

List of Tables

Preface

This guide is the printed version of CenterStage online Help. It provides conceptual, procedural, and reference information about using CenterStage features such as collaborative spaces, member management, social media tools such as wikis, blogs, and tagging, as well as access to the Documentum repository.

Intended audience

This document is intended for CenterStage end users and space coordinators.

Revision history

The following changes have been made to this document.

Revision Date	Description
August 2011	Revised for 1.2 SP1

Chapter 1

CenterStage Basics

This section is organized into the following topics:

About CenterStage — EMC Documentum CenterStage provides content services to enhance individual and team productivity. It offers a collaborative, interactive user experience that enables business users to discover and work with content in the Documentum Enterprise Content Management System. CenterStage combines the ease-of-use of Web 2.0 with the strength of the Documentum platform to deliver a balance between business agility and IT control.

CenterStage offers a full range of content services, advanced search capability, web collaboration features (such as wikis, blogs, and RSS feeds), and community workspaces so that global communities can interact dynamically across the extended enterprise and benefit from the full value of their information.

Empowers users participating in modern ECM activities

- Organize, manage, and share knowledge assets across projects and communities
- Rich internet application experience keeps users engaged and productive

Opens up information silos for faster access to knowledge

- Find knowledge assets wherever they might be
- Text analytics transform raw content into relevant findings

Delivers security, control, and compliance

- Meet governance and compliance demands transparently to the user
- Protect information from the core to the edge
- Policy-centric information management and comprehensive audit control

Provides modern collaboration, document management, and advanced search and discovery functions:

Collaboration team workspaces	**Content management**	**Advanced search and discovery**
• Configurable space composition • Community context (recent activity) • Wikis, blogs, discussion forums, RSS feeds, tagging • Comments on documents • Standalone data tables	• Access controls • Basic library services • Lifecycles • Workspace and wiki templates	• Full-text search • Guided navigation • Federated search

About spaces — A space is an online collection of content, within which space members can collaborate by accessing, managing, and sharing that content. Spaces govern the content they contain. Members can browse or search the content library to discover content in a space. Spaces have settings that allow coordinators to define member permissions, content policies, and versioning policies.

For information about spaces and types of content in a space, in addition to files and folders, see the following topics:

- Chapter 2, Spaces
- Chapter 12, Wikis
- Chapter 13, Blogs
- Chapter 14, Discussions
- Chapter 15, Data Tables

About the content library — The content library is the collection of all the content in a space (files, folders, wikis, blogs, discussions, and data tables). You can discover content in a space by switching to different views, as follows:

- In **Content** view, you can browse through the content library by using the navigation tree. The tree shows items in alphabetical order. Click an item in the tree to navigate to the item home page, or folder page.
- In **Search** view, you can view the content library non-hierarchically through filtered navigation. For example, you can see content organized by type (discussions, blogs, images, and

so on). Within one of those types, you can see all content by a particular author or created within a particular date range. See Search within a space, page 113

- In **Tag** view, you can discover content by viewing items that correspond to tags in the space. See View tags for a space, page 123.

For details about working in the content library, see the following topics:

- Chapter 4, Browse Content
- Chapter 5, Add Content
- Chapter 6, Organize Content
- Chapter 7, Modify Content

What's new in CenterStage 1.2 SP1

CenterStage 1.2 SP1 includes the following new features and improvements:

New feature or change	Description
Certifications	This release of CenterStage supports several new certifications, such as major version updates to browsers and minor version updates to operating systems, application servers, RDBMS, and Sun JRE 6.0. Also, CenterStage 1.2 SP1 is certified with several Documentum 6.7 applications.
IBM Tivoli Access Manager for e-business WebSEAL	CenterStage now supports IBM Tivoli Access Manager for e-business WebSEAL. WebSEAL is a high-performance, multi-threaded web server that applies fine-grained security policy to a protected network. WebSEAL incorporates back-end web application server resources into its security policy, and can provide single sign-on (SSO) solutions. WebSEAL acts as a reverse web proxy by receiving HTTP or HTTPS requests from a web browser and delivering content from its own web server or from back-end web application servers. Requests passing through WebSEAL are evaluated by its own authorization service to determine whether the user is authorized to access the requested resource. See *CenterStage Version 1.2 SP1 Release Notes* for information about configuring CenterStage to enable WebSEAL authentication. If your administrator has configured SSO in your environment, you may be signed in automatically when you point your browser to CenterStage.
New rich text editor	The rich text editor has been improved for this release.

Related topics

- Chapter 1, CenterStage Basics

Sign in

Access to CenterStage varies depending on the authentication method configured by your administrator. In some cases, you are signed in automatically when you point your browser to CenterStage because your access is authenticated through your Windows credentials. In other cases, CenterStage access is granted through browser-based credentials.

If your administrator has not configured a Single Sign-On authentication method, you are required to sign in to CenterStage. You sign in with your login name and either a regular password or a temporary password that you receive in e-mail. In the latter case, specify a new password for your account.

To sign in:

1. Point your browser to CenterStage.
2. In the **Sign In** dialog box, type your user name (if necessary) and a password in the appropriate fields, and then click **Sign In**.

   If you enter a temporary password, the **Reset Password** dialog box appears. In that case, enter a new password by typing the same string in both the **New password** and **Confirm** fields, and then click **Save**.

CenterStage authenticates your credentials and signs you in.

- If you are signing in for the first time, CenterStage opens to the **My Community** tab. See My Community tab, page 26.
- If you have signed in previously, CenterStage opens to where your last session ended.

Note: If you cannot sign in because you forgot your password or your account is locked, contact your system administrator or space coordinator to reset your password.

Related topics

- Explore CenterStage, page 16
- Install plug-ins, page 25
- About CenterStage plug-ins, page 24
- Sign out, page 45

Explore CenterStage

The following tables describe how to explore CenterStage:

- Table 1, page 17, Window controls
- Table 2, page 17, My Community tab
- Table 3, page 19, Navigate a space or the repository

- Table 4, page 22, View items
- Table 5, page 23, Select items
- Table 6, page 24, Customize how you access information

Table 1. Window controls

Task	Action
Resize an area of the CenterStage window.	• To resize horizontally, click and drag the dotted bar: ⋮ • To resize vertically, click and drag the dotted bar: ····
Show or hide an area of the CenterStage window.	• To hide a horizontal panel such as the **Comments** area, click . • To show a horizontal panel such as the **Comments** area, click . • To hide a vertical panel such as the navigation tree, click . • To show a vertical panel such as the navigation tree, click .

Table 2. My Community tab

Task	Action
Open the **My Community** tab.	At the left end of the tab bar, click **My Community**. If the **My Community** tab is not visible, click until the tab appears.
Change your view in the **My Community** tab.	In the view panel of the **My Community** tab, click one of the following: • **My Spaces** – All spaces to which you belong and have access rights. In the **Favorite** column, indicates a favorite space. To list all of your spaces, or only your favorite

Task	Action
	spaces, select one of the following from the **Show** menu in the toolbar: — **All of My Spaces** — **Only My Favorite Spaces** • *Repository Name* – All cabinets in the local repository for which you have appropriate permissions to view. • **New in CenterStage** – New spaces, wikis, blogs, discussions, and data tables in the site • **Items I am Editing** – Items that you have locked for editing, in all spaces to which you belong • **All Recent Activity** – Up to 100 items to which you have rights that have been modified (added, changed, moved, has had properties edited, or has been commented upon) within the past 30 days. Recent activity is tracked for the following item types: — Spaces — Wikis, blogs, discussions, and data tables — Pages, posts, topics, and data table entries — Files
Display lists of recent activity in all your spaces and in the repository.	Below **All Recent Activity** in the Community view panel, click one of the following: • **Recent Pages** – All recent wiki pages • **Recent Posts** – All recent blog posts • **Recent Topics** – All recent discussion topics • **Recent Files** – All recent files • **Recent Data Table Entries** – All recent data table entries

Table 3. Navigate a space or the repository

Task	Action
Open any space in which you are a member.	Do one of the following: • In your browser, enter the space URL or select a bookmark to the space. • In CenterStage, open an item belonging to the space. The space tab opens and is displayed in front of any other open tabs. • On the **My Community** menu or tab, click **My Spaces**. In the list of spaces, do one of the following: — Click the name of a space. — Right-click a space, and then select **View** from the shortcut menu. — Pause the cursor over a space icon. In the preview panel, click **View**. • In the top toolbar, click **My Spaces**. In the Spaces fly-out panel, click **View all of my spaces**. Then, in the **My Community** tab, click the name of a space.
Open the repository.	Do one of the following: • In the view panel of the **My Community** tab, click the repository (). The community view of the repository displays the cabinets in the repository. • From the **My Community** menu in the top CenterStage toolbar, select the repository (). The repository tab opens and displays **Content** view of the repository. • Navigate to a repository item by clicking it in a contents widget or in search results, or by following a URL (either by selecting bookmark, clicking a hyperlink, or entering a URL in your browser's address field).

Task	Action
Open a favorite space.	Do one of the following: • On the **My Community** menu or tab, click **My Spaces**, and then select **Only My Favorite Spaces** from the **Show** menu in the toolbar. In the list of spaces, do one of the following: — Click the name of a space. — Right-click a space, and then click **View** from the shortcut menu. — Pause the cursor over a space icon. In the preview panel, click **View**. • In the top CenterStage toolbar, click **My Spaces**. In the Spaces fly-out panel, click the name of a space under **Favorite Spaces**.
Change your view of a space or repository.	In the view panel of the space or repository tab, click one of the following icons to display a different view of the space: • – Home page view (spaces only) • – **Content** view, for navigating the content library • – **Search** view, for discovering content by using search strings or filters • – **Tag** view, for browsing the space by using tags (spaces only) • – **Templates** view, for exploring space-wide content templates (spaces only) **Note:** This icon is visible only to members with rights to work on templates. • – **Members** view, for viewing members and, for spaces, managing space membership

Task	Action
Navigate the content library in a space, or the content of the repository.	In **Content** view of a space or repository, do one of the following: • In the navigation tree, click one of the following items: — cabinet (repository only) — room (repository only) — folder — wiki (spaces only) — blog (spaces only) — discussion (spaces only) — data table — data table entry • In the **Content** area, click the name of an item. • In the **Content** area, double-click an item icon. • Click a link in the breadcrumbs. Each element in the breadcrumbs is a link to the named page. Breadcrumbs update to show current page, including the name of a file page. — For a space, click the name of the space to go to the space home page. Click **Content** to go to the root level of the content library. — For the repository, click the name of the repository to go to the root level of the repository.
Show or hide child items in a container.	In **Content** view of a space or repository, do one of the following in the navigation tree: • Click to expand the container (cabinet, room, folder, wiki, blog, discussion, data table, or data table entry) to show the child items. • Click to collapse the container to hide the child items.

Table 4. View items

Task	Action
Display items as thumbnails in the following contexts: • **Content** view of a space or repository • Container (cabinet, room, or folder) • Search results • **Attachments** view or the attachments area of a data table or data table entry • **Tag** view • **Items I am Editing** view of the **My Community** tab	Click in the toolbar. **Note:** If your application does not support thumbnails, the items appear as icons.
Display items as a series of slides.	Click in the toolbar. To scroll through the slides, do any of the following: • Drag the slider left and right across the horizontal scrollbar. • Click the left and right arrows at the ends of the scrollbar. • Click in the scrollbar. The slider moves in the direction of your click. • Click a slide to select it and bring it to the center of the scrollbar.
Display items in a grid with rows sorted by column details.	Click in the toolbar.
Resize the width of a column.	Click the border of a column and drag it horizontally.
Show or hide columns.	1. Point to a column heading, and then click . 2. On the **Columns** submenu, click to add a checkmark ✔ for a column to show; click to remove a checkmark for a column to hide.

Task	Action
Sort rows by column values.	In details view, click a column heading. • To reverse the sorting order of rows in the grid, click the column heading again. • To sort items by lock owner, click the heading of first column on the left. The sort order applies to all views of items: details, thumbnails, and slides. In the heading of the column by which the rows are sorted, one of the following symbols appears: • — indicates rows are sorted in ascending, alphanumeric order • — indicates rows are sorted in descending, alphanumeric order
Navigate multiple pages of items.	In the status bar at the bottom of a page, do any of the following: • Click to go to the next page. • Click to go to the previous page. • Click to go to the first page. • Click to go to the last page.
Go to a specific page in a series of pages.	In the status bar at the bottom of a page, type a number in the page field, and then press **Enter**.
Refresh a list of items.	In the status bar at the bottom of a page, click . The icon rotates as the page updates .

Table 5. Select items

Task	Action
Select an item.	Click the item.
Select all items.	Select **More >** **Select All** in the toolbar.
Select multiple, adjacent items.	Select the first item, and then press **Shift** and click the last item.
Select multiple, nonadjacent items.	Select the first item, and then press **Ctrl** and click each additional item.
Deselect a selected item.	Press **Ctrl** and click the item.

Table 6. Customize how you access information

Task	Help topics
Specify favorite spaces.	• Add a space to favorite spaces, page 51 • Remove a space from favorite spaces, page 51
Set personal preferences for subscriptions, plug-ins, and search.	Set personal preferences, page 43
Subscribe to content through a web feed.	Subscribe to content, page 74
Set notifications (watch) for content changes.	• Watch content, page 74 • Stop watching content, page 75

Related topics

- Chapter 1, CenterStage Basics
- Chapter 2, Spaces
- Chapter 3, Repositories

About CenterStage plug-ins

The CenterStage plug-ins allow you to import multiple files in one operation. In addition, with Microsoft Internet Explorer, they effectively combine the clipboards in CenterStage and the operating system, allowing you to copy and paste content between CenterStage and your local machine.

With plug-ins — Using CenterStage with plug-ins has the following effects:

- When importing files, the file-picker dialog box enables you to select multiple files at a time.
- The set of files from which to select are filtered to display only those files with extensions that are compatible with the content policy of the parent space. For example, if the content policy allows the import of JPEG, GIF, and PDF files, then only those files are displayed and can be selected.
- With Microsoft Internet Explorer, access to the desktop clipboard is provided, which enables you to do the following:
  - Copy a CenterStage item onto the desktop clipboard and paste the item as a URL into desktop clipboard-aware applications such as Microsoft Word or Outlook.
  - Copy one or more files in a CenterStage container and paste them onto the desktop or to a folder on the local file system.
  - Copy one or more files in a desktop folder and paste them into a CenterStage container, which initializes the CenterStage **Import File** dialog box.
- On a Windows desktop, files that have been checked out for editing are automatically checked in when the authoring application is closed.

Without plug-ins — Using CenterStage without plug-ins has the following effects:

- When importing files, you use the file-picker dialog box that is native to the browser, which only allows selection of one file at a time.
- The files from which to select are not filtered by file extension.
- CenterStage and operating system clipboards are separate; you cannot copy and paste items between the local computer and CenterStage.
- Files that have been checked out for editing must be manually checked in after closing the authoring application.

Related topics

- Chapter 1, CenterStage Basics
- Import files, page 77

Install plug-ins

If your site is configured to allow CenterStage plug-ins, and if they have never been installed on your machine, you can install them using your personal preferences.

To install CenterStage plug-ins:

1. From the ***Username*** menu in the CenterStage toolbar, select **My Preferences**.
2. Select the checkbox labeled **Install Plug-ins**, and then click **OK** to install and enable the plug-ins.

Once plug-ins are installed, a checkbox labeled **Use the CenterStage plug-ins** appears in the **My Preferences** dialog box.

- To disable installed plug-ins, clear the checkbox.
- To enable installed plug-ins, select the checkbox.

Note:

- The content transfer plug-in is available for both the Windows and Mac OS X operating systems.
- The plug-in component that facilitates checking in a document being edited when it is closed is available for the Windows operating system only.
- The desktop copy/paste ActiveX control is available for the Internet Explorer browser only.
- Multi-file import requires Java. The minimum required version for Java depends on the operating system and the browser being used. When the plug-ins cannot be installed due to an incompatible Java version, the member Preferences dialog box displays help text that describes the problem and provides a link to a website from which you can download the latest version of Java.

Related topics

- Chapter 1, CenterStage Basics
- About CenterStage plug-ins, page 24
- Set personal preferences, page 43
- Import files, page 77

My Community tab

The **My Community** tab is where you can view recent activity from all your spaces. You can see the changes other people make, your own changes, and the changes other people make to your content.

The **My Community** tab is automatically created as part of the installation process. It is not a space and cannot be renamed, deleted, subscribed to, or saved as a template. It does not contain content or appear in lists of spaces.

You get to the **My Community** tab in the following ways:

- By signing in to CenterStage with no space specified in the URL
- By selecting the **My Community** tab
- By selecting a command on the **My Community** menu in the top CenterStage toolbar – except for the repository selection ( ), which opens the local repository in **Content** view

My Community page views — You change page views in the **My Community** tab using either the view panel, or the **My Community** menu in the top CenterStage toolbar. Click or select one of the following:

- **My Spaces** – All spaces to which you belong and have access rights. This page appears the first time you sign in to CenterStage. In the **Favorite** column, indicates a favorite space.
- **New in CenterStage** – New spaces, wikis, blogs, discussions, and data tables
- **Items I am Editing** – Items that you have locked for editing, in all spaces to which you belong
- **All Recent Activity** – All items to which you have rights that have been modified within the past 30 days. An item is modified if it has been added, changed, moved, has had properties edited, or, for a discussion topic, has been commented upon. Recent activity is tracked for the following items:
  - Spaces
  - Wikis, blogs, discussions, and data tables
  - Pages, posts, topics, and data table entries
  - Files

  Recent activity results display up to 100 items.

Note: Selecting *Repository name* from the **My Community** menu opens the local repository in **Content** view.

The following pages display a subset of **All Recent Activity** view:

- **Recent Pages** – All recent wiki pages
- **Recent Posts** – All recent blog posts
- **Recent Topics** – All recent discussion topics
- **Recent Files** – All recent files
- **Recent Data Table Entries** – All recent data table entries

Related topics

- Chapter 1, CenterStage Basics
- Chapter 2, Spaces
- Chapter 3, Repositories
- Chapter 10, Pages
- Chapter 14, Discussions
- Chapter 12, Wikis
- Chapter 13, Blogs
- Chapter 15, Data Tables

Preview panels

A preview panel displays a detailed glimpse of an item without navigating away from your current page or from search results.

To display a preview panel, pause the cursor over an item icon. The preview panel shows the following:

- A thumbnail image of the item
- Information about the item such as when it was last changed, its size, a list of recent items, or the number of items contained in the item (specific details depend on the item type)
- Tags on the item (if any)
- Whether the item has any comments

From the preview panel, you can perform the following actions:

- For a file, click **Preview and Comment** to open the file page.
- For a non-file item, click **View** to open the item page.
- For a file, do one of the following to view the file in its native application:
  — With no plug-ins installed, click **Download File**.
  — With the plug-ins installed, click **Open File**.
- Click **Edit** to begin editing an item. While you edit, the item is locked and no one else can change it.
- For an item you have locked, click **Resume Editing** to return to editing it.
- For an item you have locked, click **Cancel Editing** to discard your changes. This permits changes by others.
- Click to view item properties.

You can also open an item by clicking it in the list of recent items (if any) in a preview panel.

Related topics

- Chapter 4, Browse Content
- Chapter 7, Modify Content

Rich text editing

When you click in a rich text widget on a page that is in edit mode, you can format text using fonts, bold, underline, italic, and so forth. You can also include links, graphics, and tables. A simplified rich text editor is available for editing rich text in comments and rich-text fields in dialog boxes.

This section includes the following topics:

- Rich text toolbars, page 28
- Insert or edit a link on a page, page 30
- Insert an image or edit image properties, page 32
- Insert or modify a table, page 34

Text editing

In the rich text editor, the shortcut (right-click) menu provides the following actions:

- Undo/Redo
- Cut/Copy/Paste
- Insert Table/Link/Image

Spell checking

In Firefox and Safari browsers, users can employ the built-in spell-checker for the browser. In Internet Explorer, users can employ a browser-specific plug-in such as ieSpell.

Related topics

- Chapter 10, Pages
- Edit an item page, page 127
- Rich text widget, page 134

Rich text toolbars

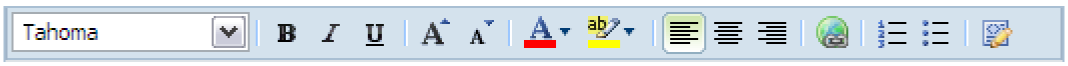
When you edit a page, and a rich-text widget has focus, the following rich-text editor (RTE) toolbar appears:

Use controls on the toolbar as follows:

Type	Tool	Description
Font style	Font	Font family (locale-sensitive choices)
	Size	Font size
Text style	**B**	Bold
	I	Italic
	U	Underline
	~~ABC~~	Strikethrough
		Text color
	A	Highlight color
Undo/Redo		Undo – Reverses actions in the rich text editor as supported by the browser
		Redo – Repeats actions in the rich text editor as supported by the browser
Alignment		Left
		Center
		Right
Margins		Moves the margin to the right
		Moves the margin to the left
Lists		Bulleted list
		Numbered list
Insert or edit		Inserts a link. Or, if you have a link selected, lets you edit or remove it. See Insert or edit a link on a page, page 30.
		Inserts an image. Or, if you have an image selected, lets you edit image properties. See Insert an image or edit image properties, page 32.
		Displays commands for adding or modifying a table. See Insert or modify a table, page 34.
		Inserts a horizontal line

Type	Tool	Description
	Source	Enables you to edit content and HTML markup. Click Source again to return to WYSIWYG (what-you-see-is-what-you-get) mode.
	Ω	Inserts a symbol. Select a symbol from the pop-up window.

CenterStage uses a simplified rich text editor for tasks like editing rich-text comments and rich-text fields in dialog boxes. It has the following toolbar:



In this case, is the link tool, and switches between WYSIWYG (what-you-see-is-what-you-get) and HTML markup editing modes.

Note: The link tool in the simplified rich text editor does not support file import.

Related topics

- Rich text editing, page 28
- Insert or edit a link on a page, page 30
- Insert an image or edit image properties, page 32
- Insert or modify a table, page 34

Insert or edit a link on a page

To insert a link in a rich-text widget, you can use either the link tool (described in the following procedure), or you can paste. If the clipboard has a URL, pasting it creates a link with the URL as the link text. If your clipboard contains a CenterStage item from the current repository, and if you are using the plug-in, pasting it also creates a link.

To insert or edit a link using the link tool:

1. Activate edit mode in a rich text widget by doing one of the following:
   - Edit a wiki page and click in a rich text widget.
   - Edit a data table entry and click in a rich text widget.
2. Select text, or position the insertion point within an existing link, and then click in the RTE toolbar.

   The **Link** dialog box appears. Complete or modify the dialog box according to the following steps.

3. For **Link to**, do one of the following:
   - Paste or type a web address in the text field.
   - Click **Select** to complete the **Select an item** dialog box as follows:
     — In a wiki, you can link to an item by searching for that item, importing a file, or creating a new page.

     — In a blog or discussion, you can link to an item by searching for that item or by importing a file.

     — In a data table entry with an attachment field, you can link to an item by searching for that item or by importing a file.

To search for an item to link to:	To import a file to link to:	(Wikis only) To create a new page to link to:
1. Open the **Search** tab. 2. Click **Search in** and select a range (or scope) within which to search for an item. Choices are as follows: • **Current page** • **Current space** • **Only my favorite spaces** • **My spaces** • **Entire site** • **My recent items** 3. Optionally, in the **Search** field, type a search string to locate an item with a name that matches the string. 4. To choose an item in the results list, either double-click it, or select it and click **OK**. On the **Link** dialog box, the URL of the selected item appears in the **Link to** field, and the name of	1. Open the **Import File** tab. 2. Click **Browse** to select a file. 3. Click **OK** to import the selected file. 4. On the **Link** dialog box, click **Select**. 5. On the **Select an Item** page, select the file that you imported, and then click **OK**. On the **Link** dialog box, the URL of the imported file appears in the **Link to** field, and the name of the file appears in the **Tip** field. When you import a file to link to, the file is imported as an attachment to the item. **Note:** • When editing a data table entry in a data table that has an attachment field in the schema, you can use the **Import File** tab to import files. The imported file is added to the attachment field of the entry.	1. Open the **New Page** tab. 2. Type the name of the new page, and then click **OK**. On the **Link** dialog box, the URL of the new page appears in the **Link to** field, and the name of the page appears in the **Tip** field. When you save the wiki page, clicking the link either prompts you to create a page, or opens the page, once it is created.

To search for an item to link to:	To import a file to link to:	(Wikis only) To create a new page to link to:
the item appears in the **Tip** field.	• When editing a data table entry in a data table that has no attachment field in the schema, there is no **Import File** tab in the **Select an Item** dialog box, so you cannot import files in this way. • When creating a new data table entry, there is no **Import File** tab in the **Select an Item** dialog box, so you cannot import files in this way.	

4. Click **OK** to create the link or to put your changes into effect.

You can edit the link by doing one of the following:

- Select the link and then click in the RTE toolbar.
- Right-click the link and then select **Insert Image** from the shortcut menu.

Related topics

- Rich text editing, page 28
- Rich text toolbars, page 28
- Insert an image or edit image properties, page 32
- Insert or modify a table, page 34

Insert an image or edit image properties

To insert or edit the properties of an image:

1. Activate edit mode in a rich text widget by doing one of the following:
   - Edit a wiki page and click in a rich text widget.
   - Edit a data table entry and click in a rich text widget.
2. In the RTE toolbar, click .

   The **Image** dialog box appears. Complete or modify the dialog box according to the following steps.

3. For **Image**, specify a web address, or click **Select** to either search for or import an image file into CenterStage, as follows:
   - To search for an image, select the **Search** tab, then select a range or scope in the Search-in menu, as follows:
     - **Current page**
     - **Current space**
     - **Only my favorite spaces**
     - **My spaces**
     - **Entire site**
     - **My recent items**
   - To import an image, do the following:
     1. Select the **Import Image** tab.
     2. Click **Browse** to select the image to import.
     3. Click **OK**.
     4. In the **Import Image** dialog box, click **OK**.
4. Optionally, for **Description**, specify alternate text to display as a tooltip for the link.
5. Optionally, specify the following image properties:
   - **Width** and **Height**, in pixels
   - **Border**, in pixels
   - **Horizontal margin**, in pixels
   - **Vertical margin**, in pixels
6. For **Alignment**, select one of the following choices:
   - **<not set>** (the default)
   - **Left**
   - **Right**
7. Click **OK** to insert the image.

You can resize an existing image by selecting it and dragging the corner or side handles. Or, you can edit the image by doing one of the following:

- Select the image and then click **Image** in the RTE toolbar.
- Right-click the image and then select **Image Properties** from the shortcut menu.

Related topics

- Rich text editing, page 28
- Rich text toolbars, page 28
- Insert or edit a link on a page, page 30
- Insert or modify a table, page 34

Insert or modify a table

To insert or modify a table:

1. Activate edit mode in a rich text widget by doing one of the following:
   - Edit a wiki page and click in a rich text widget.
   - Edit a data table entry and click in a rich text widget.
2. Using the table controls, insert or modify a table by doing one of the following:

Task	Action
Insert a table.	1. In the RTE toolbar, click . The **Table Properties** dialog box appears. 2. Complete table properties as follows: • **Rows** and **Columns** – Specify the number of rows and columns for the table. • **Headers** – Select the area of the table to style as a header — either **First Row**, **First Column**, **Both**, or **None**. • **Border size** – Specify the size of the border, in pixels. • **Alignment** – Select a horizontal alignment for the table, either **<not set>**, **Left**, **Center**, or **Right**. • **Width** – Specify the width of the table, in **percent** or **pixels**. • **Cell spacing** – Specify the spacing between cells, in pixels. • **Cell padding** – Specify the padding within cells, in pixels. 3. Click **OK** to insert the table.

Task	Action
Edit table properties.	1. Double-click a table, or right-click in a table and then select **Table Properties** from the shortcut menu. The **Table Properties** dialog box appears. 2. Modify table properties as appropriate. Table properties are the same as for inserting a table except the values for **Rows** and **Columns** are read-only. 3. Click **OK** to put your changes into effect. **Note:** To resize table width and height, you can select the table, and then drag the handles that appear on the sides and corners of the table.
Delete a table.	Right-click in a table and select **Delete Table** from the shortcut menu.
Modify the number of cells in a table.	1. Right-click in a table to display the shortcut menu. 2. Slide right on the **Cell** command and select one of the following: • **Insert Cell Before** or **Insert Cell After** • **Delete Cells** • **Merge Right** or **Merge Down** • **Split Cell Horizontally** or **Split Cell Vertically**
Modify cell properties.	1. Right-click in a table and select **Cell Properties**. 2. Modify cell properties as follows: • Specify a **Width** and **Height**, in **pixels** or **percent** • Specify **Word Wrap** (**Yes** or **No**) • Specify **Horizontal Alignment**, either **<not set>**, **Left**, **Center**, or **Right**. • Specify **Vertical Alignment**, either **<not set>**, **Top**, **Middle**, **Bottom**, or **Baseline**.

Task	Action
	• Specify **Cell Type**, either **Data** or **Header**. • **Rows Span** – Specify the number of rows the cell spans. • **Columns Span** – Specify the number of columns the cell spans. • Choose an optional **Background Color**. • Choose an optional **Border Color**. 3. Click **OK** to put your changes into effect.
Modify the number of rows in a table.	1. Right-click in a table to display the shortcut menu. 2. Slide right on the **Row** command and select one of the following: • **Insert Row Before** or **Insert Row After** • **Delete Rows**
Modify the number of columns in a table.	1. Right-click in a table to display the shortcut menu. 2. Slide right on the **Column** command and select one of the following: • **Insert Column Before** or **Insert Column After** • **Delete Columns**

Note: In Internet Explorer 8, it is difficult to select a table with cellspacing==0. To select such a table, click the table border, which is 1 pixel wide.

Related topics

- Rich text editing, page 28
- Rich text toolbars, page 28
- Insert or edit a link on a page, page 30
- Insert an image or edit image properties, page 32

Comment on content

In CenterStage, you can post, read, and respond to comments on items. Most CenterStage pages have a **Comments** panel, except for the following pages and views:

- Space home page
- Blog home page
- Discussions home page
- **Attachments** view of a page
- **History** view of a page
- **Version** view of a page
- **All Pages** view of a wiki
- **Tag** view of a space
- **Members** view of a space
- All pages and views in the **My Community** tab

Repository items (cabinets, folders, files, and data tables) can have comments if the **Allow comments** checkbox is selected on the item page.

Related topics

- Chapter 1, CenterStage Basics
- View comments on content, page 37
- Add comments on content, page 38
- Reply to a comment, page 39
- Edit a comment, page 40
- Delete a comment, page 40

View comments on content

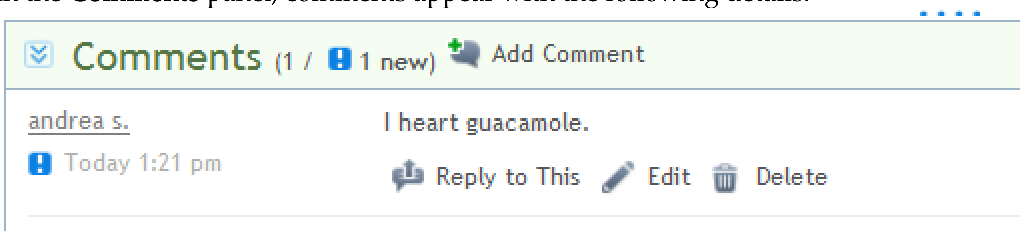
You can view comments if you have Read permission for an item.

By default, the **Comments** panel on a page is collapsed. To expand the panel, click . Click and drag to size the panel vertically.

To view comments on an item, do one of the following:

- For a CenterStage item, pause the cursor over an item icon. In the preview panel, click the **comments** link. The item page opens with the **Comments** area open at the bottom of the page.
- For a CenterStage item, open the item page, as described in View an item page, page 126. At the bottom of the page, click or click the **Comments** title to open the **Comments** panel.
- For a repository item, open the item page, as described in View an item page, page 126. At the bottom of the page, and if the **Allow comments** checkbox is selected, click or click the **Comments** title to open the **Comments** panel.

In the **Comments** panel, comments appear with the following details:



- Each comment shows an author name, a timestamp, and the body of the comment.
- Comments are sorted with the most recent top-level comments at the top.
- The title bar of the **Comments** panel displays the number of unread comments that were added since the last time you viewed the item comments.
- An exclamation point marks each unread comment.
- Direct replies are indented below the comment and are listed in chronological order.

Related topics

- Chapter 1, CenterStage Basics
- Comment on content, page 37
- Add comments on content, page 38
- Reply to a comment, page 39
- Edit a comment, page 40
- Delete a comment, page 40

Add comments on content

If you have Read and Comment permission for an item, you can comment on the following types of item:

- File
- Folder
- Blog post
- Wiki home page
- Wiki page
- Data table
- Data table entry (if comments are enabled for entries in the data table)

For a repository item (cabinet, folder, file, or data table), you need at least Edit rights to enable comments.

To add a comment:

1. Open an item page, as described in View an item page, page 126.

The **Comments** panel displays all the comments for the item. It also indicates how many comments have been added and how many of them are new.

Note: If the **Comments** panel is hidden (collapsed), click or click the **Comments** title to display it.

2. In the title bar of the **Comments** panel, click **Add Comment**. In a discussion topic, click **New Reply** to add a comment.

3. Write your comment.

4. To save and post your comment, click **Post**.

   The new comment appears at the top of the **Comments** panel.

Once the comment is posted, you can modify it by clicking **Edit** below the comment. To delete the comment, click **Delete**.

Related topics

- Chapter 1, CenterStage Basics
- Comment on content, page 37
- View comments on content, page 37
- Reply to a comment, page 39
- Edit a comment, page 40
- Delete a comment, page 40

Reply to a comment

To reply to a comment:

1. Below the comment to which you want to reply, click **Reply to This**.

   The **Reply to comment** dialog box opens.

2. Write your reply.

3. To save and post your reply, click **Post**.

Your new reply is added to the **Comments** area, indented below the comment to which you replied, after any other replies that are already there.

Once the reply is posted, you can modify it by clicking **Edit**. To delete a reply, click **Delete**.

Related topics

- Chapter 1, CenterStage Basics
- Comment on content, page 37
- View comments on content, page 37
- Add comments on content, page 38
- Edit a comment, page 40
- Delete a comment, page 40

Edit a comment

Only the author of a comment or a space coordinator can edit it.

To edit your own comment:

1. Open the item page, as described in View an item page, page 126.

   Note: If the **Comments** area is hidden (collapsed), click or click the **Comments** title to show it.

2. Below the comment to edit, click **Edit**.

   The **Edit comment** dialog box opens.

3. Edit the comment.

4. To save and post your edited comment, click **Post**.

Your edited comment replaces your original comment in the **Comments** area.

Related topics

- Chapter 1, CenterStage Basics
- Comment on content, page 37
- View comments on content, page 37
- Add comments on content, page 38
- Reply to a comment, page 39
- Delete a comment, page 40

Delete a comment

You can delete a comment if you are the author of a comment, the owner of the item containing the comment, or if you are a space coordinator.

To delete a comment:

1. Open the item page, as described in View an item page, page 126.

   Note: If the **Comments** area is hidden (collapsed), click or click the **Comments** title to show it.

2. Below the comment to delete, click **Delete**.

3. In response to the message that asks for your confirmation, click **Yes** to continue with the deletion.

The comment, and any replies to it, are removed from the **Comments** area.

Related topics

- Chapter 1, CenterStage Basics
- Comment on content, page 37
- View comments on content, page 37
- Add comments on content, page 38

- Reply to a comment, page 39
- Edit a comment, page 40

Collaborate with others

CenterStage provides a variety of ways to collaborate with other members. You can share content with and send e-mail to other members or repository users, as described in the following topics:

- Share content, page 41
- Send e-mail to members, page 42

Share content

To share content with other space or repository members, you can send links through e-mail.

To share content:

1. Do one of the following:

Action	Context
Right-click the item and select **Share *Item*** from the shortcut menu.	• In the navigation tree of a space or repository in **Content** view • In the **Content** area of a space or repository in **Content** view • In search results
Select the item and select **More >** **Share *Item*** in the page toolbar.	• In the **Content** area of a space or repository in **Content** view • In search results
Select **Share *Item*** from the **Actions** toolbar.	When viewing the item

2. Complete the **Share a Link by e-mail** dialog box as follows:

Field	Description/Action
To	To add members as recipients of your e-mail, do the following: 1. Click . 2. To search for one or more members, type all or part of the member or group name or e-mail address in the search box at the top of the **Choose Members** dialog box.

Field	Description/Action
	CenterStage lists all members and groups with names or e-mail addresses that match the characters you type, or all members if you leave the search box empty. 3. Select a member or a group and click **Select**. To select multiple members, **Ctrl**-click to select nonadjacent members, or **Shift**-click to select contiguous members. Use the page controls at the bottom of the members list to view additional members. 4. Click **OK** to validate and return to the **Share a Link by e-mail** dialog box.
Subject	The field is populated with "CenterStage alert: *item name*". You can modify it, if necessary.
Message	The field is populated with the link. You can modify the message using the rich text editor as described in Rich text widget, page 134.

3. Click **Send** to validate and send the e-mail.

Related topics

- Chapter 2, Spaces
- Chapter 10, Pages
- Chapter 12, Wikis
- Chapter 13, Blogs
- Chapter 14, Discussions
- Chapter 15, Data Tables

Send e-mail to members

In CenterStage, you can send e-mail messages to members of a space, or to repository users with email addresses.

To send e-mail to members:

1. Open **Members** view of a space or repository as described in View space members, page 217, or View repository members, page 63, respectively.
2. Select the members to whom you want to send e-mail.
3. In the members page toolbar, click **Send Email**.

   CenterStage opens a new e-mail message in your default e-mail client. The **To** field is preaddressed to the selected members for whom an e-mail address is available.

4. Write your message and send it.

Note: In CenterStage, you can also send e-mail to an individual by clicking one of the following:

- E-mail address in the **Email** column of the members page.
- E-mail address on the **Add members** page.

Related topics

- Chapter 4, Browse Content
- Comment on content, page 37
- Share content, page 41

Organize personal information

You can customize how you access information in the following ways:

Preferences
Set options according to your personal preferences, as described in Set personal preferences, page 43.

Subscriptions and notifications
You can keep current with changes that occur in a space by subscribing to, or watching content.

See the following topics:

- Subscribe to content, page 74
- Watch content, page 74
- Stop watching content, page 75

Set personal preferences

1. To open preferences, select **My Preferences** from the ***Username*** menu in the top CenterStage toolbar.
2. Set subscription and plug-in preferences in the **General** tab as follows:

Field/Control	Description/Action
Subscriptions	The frequency with which you are notified of changes to items to which you are subscribed or are watching. Choices are as follows: • **As soon as updated** - Receive an e-mail notification per item. • **Daily** - Receive one e-mail notification per day that includes all changes for all items you are watching, grouped by spaces.

Field/Control	Description/Action
	• **Weekly** - Receive one e-mail notification per week that includes all changes for all items you are watching, grouped by spaces.
Plug-ins (appears only if the administrator configures your site to allow plug-ins)	CenterStage plug-ins provide the following enhancements: • Copy and paste support between CenterStage and your desktop • Faster file uploads • Improved file editing, and multiple file import If the plug-ins have never been installed, a checkbox labeled **Install Plug-ins** appears. Select the checkbox to install plug-ins. Once the plug-ins are installed, a selected checkbox labeled **Use the CenterStage plug-ins** appears. • To disable installed plug-ins, clear the checkbox. • To enable installed plug-ins, select the checkbox.

3. Set preferences for extra sources in the **Search** tab as follows:

Field	Description
Enable	The source to include in your extra sources when performing a global search
User name	The login name, if necessary for this source. For desktop searches, the login name must start with the name of your machine, followed by a backslash character and your Windows user name: <*myMachineName*>\<*myWindowsLogin*>.
Password	The login password, if necessary for this source. For security reasons, the number of bullets does not reflect the number of characters in the password.

4. Set preferences for e-mail notifications in the **Advanced** tab as follows:

Field	Description
CenterStage server URL	The server URL CenterStage uses to create links to spaces, wikis, and so on, when sending notification e-mails
Time zone	The time zone for CenterStage notifications
Language	The language for the CenterStage notifications

5. Click **OK** to put your changes into effect.

Related topics

- About CenterStage plug-ins, page 24
- Subscribe to content, page 74
- Watch content, page 74
- Search for global content, page 111

Sign out

In the top CenterStage toolbar, click **Sign Out**.

To ensure that all CenterStage session information is cleared from your browser memory, close your browser.

The next time you sign in, CenterStage opens to the space tab that was active when you signed out.

Related topics

- Chapter 1, CenterStage Basics
- Sign in, page 16

Chapter 2

Spaces

This section is organized into the following topics:

About spaces — A space is an online collection of content, within which space members can access, manage, and share that content. Spaces govern the content they contain. The collection of all content in a space (files, folders, wikis, blogs, discussions, and data tables) is the *content library*. Members can browse or search the content library to discover content in a space. Spaces have settings that define member permissions, content policies, and versioning policies. Space coordinators manage space settings.

Space home page — The space home page appears by default when you navigate to a space, as described in View a space, page 49.

The appearance of a space home page depends on the widgets it contains, but by default, it has the following widgets:

- **Rich Text** widget that shows a welcome message
- **Recent Activity** widget that shows items recently added to or changed in the space
- **Contents** widget that shows the top-level items in the space (wikis, blogs, discussions, data tables, and folders)

Like home pages for blogs and discussions, a space home page does not have a **Comments** area.

For information about editing a space home page, see Edit an item page, page 127.

Space views — Each space has its own tab within CenterStage. You can discover content in a space by switching to different views such as **Search** view, **Tags** view, or **Content** view. Or, you can display different types of information in a space, such as **Templates** view and **Members** view.

To display **Home** view of a space, click  in the view panel of the space tab.

To display a different view of a space, click one of the following icons in the view panel:

Icon	Description	Help topic
	**Content** view, to browse the content library	Content view of a space, page 50
	**Search** view, to discover content by using search strings or filters	Search within a space, page 113
	**Tag** view, to browse the space by using tags	View tags for a space, page 123
	**Templates** view, to manage space-wide content templates (visible only to members with **Content Template Creators** privileges in the space)	Chapter 20, Templates
	**Members** view, to display members and, for space coordinators, to manage space membership	View space members, page 217

Favorite spaces — Favorite spaces are those you visit frequently and want to access quickly, like personal bookmarks or favorites in your browser. Within CenterStage, you can add, remove, and navigate to favorite spaces, as described in the following topics:

- Add a space to favorite spaces, page 51
- View a favorite space, page 50
- Remove a space from favorite spaces, page 51

Membership — Spaces have membership that determines who can contribute to the work that is being done in the space. A space can be public so everyone in a site can access it, or private so that users must be granted membership by a space coordinator. See Chapter 17, Space Membership.

Note: Superusers can always access private spaces, even if they are not members of a space.

Member roles — Member roles determine member permissions within a space, or members can have explicit permission granted for any item in the space. See Chapter 18, Permissions and Roles.

Space templates — New spaces are created from existing space templates. Existing spaces (including layout and content within the space) can be saved as new space templates. See Chapter 20, Templates.

Related topics

- View a space, page 49
- Chapter 8, Search for Content

View a space

To view a space, do one of the following:

Action	Context
Follow a URL to the space or to content in the space.	A hyperlink, bookmark, or URL entered in the address field of your browser
Click the space.	Among your favorite spaces listed in the fly-out panel that appears when you click **My Spaces** in the top CenterStage toolbar.
Click the name of the space.	• In the following views of the **My Community** tab: — **My Spaces** — **New in CenterStage** • In search results
Right-click the space and select **View** from the shortcut menu.	In **My Spaces** view of the **My Community** tab
Select the space and click **View** in the page toolbar.	In **My Spaces** view of the **My Community** tab
Click or pause the cursor over the space icon (, or other), and then click **View** in the preview panel.	In the following views of the **My Community** tab: • **My Spaces** • **New in CenterStage** • In search results

Related topics

- My Community tab, page 26
- Chapter 2, Spaces
- Navigate content of a space or repository, page 67

Content view of a space

In **Content** view, you access all of the content in a space. To display **Content** view, do one of the following:

- In the view panel of the space tab, click .
- Navigate to an item in a space by doing one of the following:
  — Click an item on a page, in a contents widget, or in search results.
  — Follow a link, a bookmark, or a URL entered in your browser.

The first time you display **Content** view, you see the top level of the content library. After that, you see the last page you were on before you closed the space.

Related topics

- Chapter 2, Spaces
- Navigate content of a space or repository, page 67
- Chapter 8, Search for Content

View a favorite space

To view a favorite space, do one of the following:

- On the **My Community** menu or tab, click **My Spaces**, and then select **Only My Favorite Spaces** from the **Show** menu in the toolbar. In the list of spaces, do one of the following:
  — Click the name of a space.
  — Right-click a space, and then select click **View** from the shortcut menu.
  — Pause the cursor over a space icon. In the preview panel, click **View**.
- In the top CenterStage toolbar, click **My Spaces**. In the Spaces fly-out panel, click the name of a space under **Favorite Spaces**.

Related topics

- My Community tab, page 26
- Chapter 2, Spaces

Add a space to favorite spaces

To add a space to favorites:

1. Do one of the following:
   - In **My Spaces** view of the **My Community** tab, do one of the following:
     — Select one or more spaces, right-click, and then select **Add to Favorites** from the shortcut menu.
     — Select one or more spaces, and then click **Add to Favorites** in the toolbar of **My Spaces** view.
   - Right-click the space tab and select **Add to Favorites** from the shortcut menu.

Related topics

- My Community tab, page 26
- Chapter 2, Spaces
- View a favorite space, page 50
- Remove a space from favorite spaces, page 51

Remove a space from favorite spaces

To remove a space from favorites:

1. Do one of the following:
   - In **My Spaces** view of the **My Community** tab, do one of the following:
     — Select one or more spaces, right-click, and then select **Remove from Favorites** from the shortcut menu.
     — Select one or more spaces, and then click **Remove from Favorites** in the toolbar of **My Spaces** view.
   - Right-click the space tab and select **Remove from Favorites** from the shortcut menu.

Related topics

- My Community tab, page 26
- Chapter 2, Spaces
- View a favorite space, page 50
- Add a space to favorite spaces, page 51

Close a space

To close a space, click on the space tab.

Related topics

- Chapter 2, Spaces
- View a space, page 49

Create a new space

To create a new space you must have permission to add a space to the site, which is separate from the role you have in CenterStage. If you are unable to create a space, contact your system administrator about adding you to the **dce_room_creator** role in the Documentum repository.

1. In **My Spaces** view of the **My Community** tab, click **New Space** in the page toolbar.
2. Complete the first step of the **New Space** dialog box as follows:

Field/Control	Description/Action
Space Name	Type a name for the space that is unique in the repository.
Choose a space template.	From the left column, select a template category, if available. In the right column, select a template.

3. Click **Next**.
4. Complete the next step of the **New Space** dialog box as follows:

Field/Control	Description/Action
Description (optional)	Type a description to appear in **My Spaces**. This field is also searched when you search for spaces.
Icon	Click to select an icon for the space. The icon from the template is initially selected.
Access to the space is	Select from the following options: • **Public** - Everyone in the site can access the space. • **Private** - Only members invited by space coordinators can access the space. **Note:** This setting cannot be changed once the space is created.

5. Click **Create**.

The home page of the new space appears in a new tab.

As the creator of the space, you have **Coordinator** permissions for the space and are the first member. You manage settings in space settings, and manage membership in space **Members** view.

Related topics

- Chapter 2, Spaces
- View or edit space settings, page 53
- View space members, page 217
- Invite members to a space, page 223
- Add members to a private space, page 220
- Chapter 18, Permissions and Roles

Delete a space

Among the members of a space, only a space coordinator can delete a space.

Deleting a space deletes any content that is not linked to another space, and deletes the custom roles of a space.

To delete a space:

1. Open the space.
2. Right-click the space tab and select **Delete** from the shortcut menu.
3. Select the checkbox labeled **Delete the space, and all of the content in it**.
4. Click **Delete this space** to confirm that you want to delete the space, and its content, permanently.

   The space is deleted. Any content that is linked to another space is not deleted in the other space. The members of the space are not deleted from the repository.

Related topics

- Chapter 2, Spaces

View or edit space settings

The control to view or edit space settings (**Space Settings**) is visible to space coordinators only.

To view or edit space settings:

1. Open space settings by doing one of the following:
   - Right-click the space tab and select **Space Settings** from the shortcut menu.
   - In home page view of the space, select **Space Actions** > **Space Settings**.

- In **Members** view of a space, click **Space Settings** in the page toolbar.
- In **My Spaces** view of the **My Community** tab, do one of the following:
  — Click in the first column of the row that lists the space.

  — Select the space and click **Space Settings** in the toolbar.

2. The **Space Settings** dialog box includes the following tabs:

Space Settings tab	Help topic
General	General space settings, page 54
Content Policy	Content policy, page 55
Versions	Space versioning policy, page 56
Permissions	Space permissions, page 56
Invitations	Default invitation text, page 58

3. Configure space settings, and then do one of the following:
   - Click **Save** to put all changes into effect and close the **Space Settings** dialog box.
   - Click **Cancel** to discard your changes and close the **Space Settings** dialog box.

Related topics

- Chapter 2, Spaces

General space settings

To view or edit general space settings

1. Open space settings as described in View or edit space settings, page 53.
2. Select the **General** tab.
3. Complete or modify fields in the **General** tab as follows:

Field	Description
Name	Name of the space.
Description (optional)	Text that appears in **My Spaces**.
Icon	Icon that appears on the space tab and in lists that include spaces.
Space access (read-only)	Indicates whether the space is **Public** or **Private**. This field is set when the space is created and cannot be changed thereafter.

Related topics

- Chapter 2, Spaces

Content policy

The space or repository content policy is a set of rules that define the types of and the default property values for imported files. Each type of content in CenterStage belongs to an object type. For details about object types, refer to the documentation for Documentum Administrator.

A content policy rule consists of a specified object type paired with a particular file format. The space coordinator manages the content policy for a space, and the administrator manages the content policy for a repository.

To view or edit a content policy:

1. Open space or repository settings, as described in View or edit space settings, page 53 or View or edit repository settings, page 64.
2. Select the **Content Policy** tab, if necessary (it is the only tab in repository settings).
3. Define the rules that pair object types with the file formats allowed in the space, as follows:
   a. Click **New rule**.
   b. In the column titled **Members can create a**, click **Choose type** and select an object type from the drop-down list.
   c. In the column titled **When they import a file in this format**, click **Choose formats** and select a file format to associate with the object type. You can add multiple formats.

   Note: By default, a new content policy includes the `dm_document` and `dm_folder` object types and includes default pairings for these two object types.

   You can add multiple formats by repeating this step.
4. To edit the rule properties that are automatically populated during import of files with this format:
   a. Next to the rule, click **Edit**.
   b. Specify properties as appropriate.

   Note: If you provide default values for all required properties, then members can import content without prompts for required properties.
5. To remove a rule, click  in the row for the rule. Then at the prompt, click **Yes**.
6. When you are done editing the content policy, click **OK**.

Related topics

- Chapter 2, Spaces
- Chapter 3, Repositories

Space versioning policy

Coordinators can specify the versioning policy for pages and files in the space.

To view or edit space versioning policy:

1. Open space settings as described in View or edit space settings, page 53.
2. Select the **Versions** tab.
3. When a page or file is updated, specify whether a new version is created. And if so, specify how version information is specified, by selecting one of the following options:
   - **The space automatically sets version information**: Automatically create a new version and number it in one of the following ways:
     — **Update to the next major number**: Increment the version by one major number (for example, version 2.0, version 3.0, and so on).
     — **Update to the next minor number**: Increment the version by one minor number (for example, version 1.1, version 1.2, and so on).
   - **Members manually set version information**: Allow members to select the next major or minor number in the version sequence. Also allow members to provide a version note when saving a new version. Otherwise, members can only add a version note by opening the **Version** tab in the item **Properties** dialog box, for the current version only.
   - **Items are not versioned (overwrite the current version)**: Overwrite the existing page or file and do not add a new version. Members can add or modify the version note for the current version by opening the **Version** tab in the item **Properties** dialog box.
4. Decide whether members can specify a version policy for a page or file that differs from the space policy. To do so, either select or clear the checkbox labeled **Members are allowed to change the version settings for individual files**.

Related topics

- Chapter 2, Spaces
- Chapter 19, Versioning

Space permissions

You manage space permissions on the Permissions tab of space settings. Space permissions (also known as the access control list, or ACL) define the permissions for member roles in the space. Users and groups (accessors) are assigned to either a standard or custom role that determines what default permissions they have in the space.

The space ACL can only have roles, not members. All space accessors except for the Content Owner and Coordinator are optional and can be removed from the ACL.

Among space members, only a space coordinator can edit space permissions.

To view or edit space permissions:

1. Open space settings as described in View or edit space settings, page 53.

2. Select the **Permissions** tab.
3. Complete or modify the **Permissions** tab as follows:

Field/Control	Description/Action
Slider  or edit role 	For any role, you can use the slider or edit role settings to specify the permission level for those members to have. See Modify permissions settings for roles, page 231. **Note:** If you set the permission level for a role to None, the role remains defined in the space, though it does not appear on the default ACL of items created in the space. Such a role can still be added to an item ACL, however. In that case, members in the role would have no access to the item. On the other hand, permissions are cumulative, so if a member in a role set to none could have permissions to the space if they get it from another role. The **Content Owners** role applies to any member who creates content in the space. This role has no settings to modify, but you can change the permission level.
New Custom Role	To create a custom role, see Add custom roles, page 229.
	To delete a custom role, see Delete a custom role, page 232.
View Permissions for Any Member	To see the space permissions for a given member, see View member permissions, page 228.
Apply these settings to all items in the space.	This option changes current permissions for all items in the space to match the permission settings of the space. However, this option does not prevent later permission changes for those items. When you save space settings, this checkbox is cleared to ensure that you can change the permissions of items back to the permission settings of the space, regardless of further permissions changes you make to those items.

4. Click **Save** to put the permission changes into effect for the space.

Related topics

- Chapter 2, Spaces
- Chapter 18, Permissions and Roles

- Modify permissions settings for roles, page 231
- View or edit item permissions, page 105

Default invitation text

Space coordinators can customize the default content of the **Invitation to join the space** dialog box that appears when inviting members to a space.

To view or edit default invitation text:

1. Open space settings as described in View or edit space settings, page 53.
2. Select the **Invitations** tab.
3. Complete or modify the **Invitations** tab as follows:

Field/Control	Description/Action
Subject (required)	The default text in the **Subject** line of the **Invitation to join the space** dialog box. Include any of the following variables if you want the default **Subject** line to contain the specified output: • `{spaceName}` – name of the space that contains the item • `{spaceURL}` – web address for the item
Message	The default text in the **Message** box of the **Invitation to join the space** dialog box. Include any of the following variables if you want the default **Message** body to contain the specified output: • `{spaceName}` – name of the space that contains the item • `{spaceURL}` – web address for the item

Related topics

- Chapter 2, Spaces
- Invite members to a space, page 223

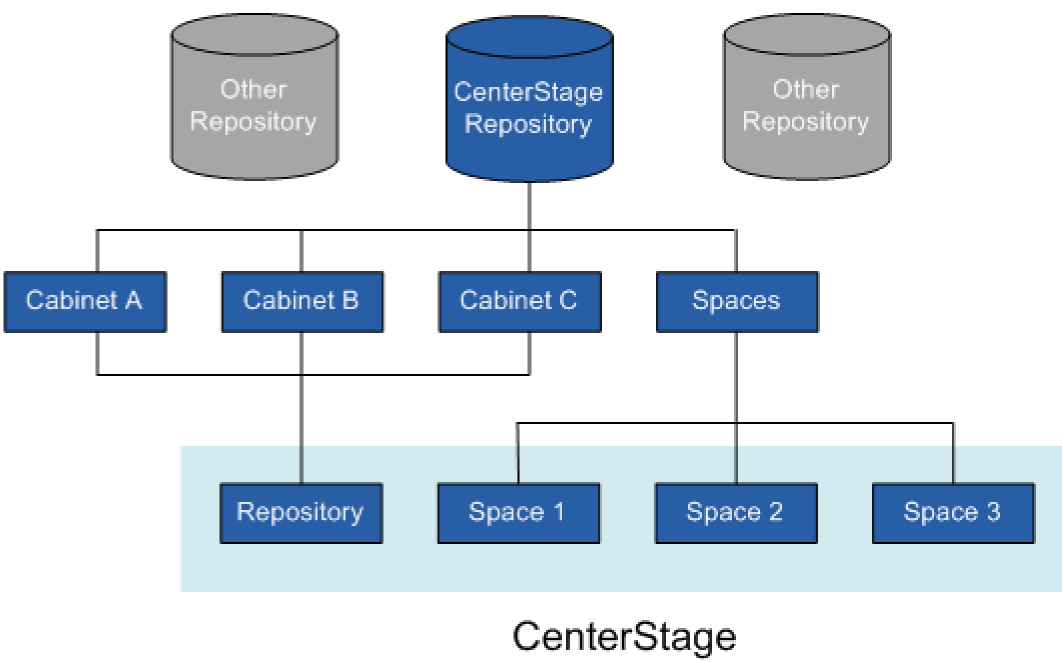
Chapter 3

Repositories

This section is organized into the following topics:

About repositories — A repository is a virtual storehouse for enterprise content, including CenterStage spaces. Your organization might use multiple repositories. Each repository is comprised of nodes that give access to the repository's content and functions.

Cabinets in the local repository are available for browsing inside CenterStage, as depicted in the following diagram.



The *local* repository is the one in which the CenterStage spaces are hosted.

A *remote* repository is any repository other than the local one, usually part of a "federation." Remote repositories are available as external sources in global search. Remote repositories cannot be browsed.

In CenterStage, the local repository ( ) appears in the following places:

- The view panel of the **My Community** tab
- The **My Community** menu in the top toolbar
- The bread crumb trail for repository items
- The Location facet on a global search results page

The local repository does not appear as a search result, nor does it appear in a content widget.

Repository items — A repository item is not governed by a space and has no CenterStage roles in its permissions. The primary location of a repository item is outside of a space, though it can have links anywhere. In contrast, a CenterStage item is governed by a space, and has CenterStage roles in its permissions. The primary location of a CenterStage item is in a space, though it can have links anywhere.

Repository items that you can access in CenterStage are as follows:

Repository item	Description
Cabinet ( )	A cabinet is a direct child of a repository. It works like a folder, but has a cabinet icon and a limited set of properties. Further, CenterStage users cannot create, copy, or delete cabinets. Certain repository cabinets are inaccessible in CenterStage. These include: • Resources • Spaces • System • Temp • Templates On the repository page, only the owner of a cabinet marked "private" can see it. A home cabinet is the location associated with a given user account, and appears among other cabinets for that user.
Folder	Any item with the type **dm_folder** or a subtype of **dm_folder**. It works like a folder in a space.
Room ( )	Has the same item type as a CenterStage space, but is not created by CenterStage.

Repository item	Description
Data table	Has the type **dmc_datatable** but is not controlled by CenterStage. It works like a data table in a space, but its schema (fields and settings) cannot be edited in CenterStage. Repository data tables can be copied in the repository, but new ones cannot be created there. Individual entries cannot be created, edited, copied, moved, or deleted.
File	Any item with the type **dm_document**, or a subtype of **dm_document**. You can import files to the repository, and repository files work like files in a space.

Note: CenterStage wikis, blogs, discussions, data tables, and their child items, cannot be created, moved or linked into repository locations. Most actions that you can perform on CenterStage items you can also perform on repository items, with the following exceptions:

- There are no tagging controls for repository items.
- Repository items have no **Comments** panel unless commenting is enabled for the item in the repository.
- You cannot save a repository item as a template.
- **Start Watching** and **Stop Watching** are unavailable for repository items.
- **Subscribe** is unavailable for repository items.
- There are no settings for the versioning policies of repository documents. However, when you import a new version of a repository document, you can specify either a **Major** or **Minor** version.

Repository members — Repositories have a member list that CenterStage users can browse in the repository **Member** view. The repository member list has all the users you see in the member list of a public space, but without the roles from any spaces. For example, if you share a repository item, the member picker for adding recipients of the message shows the repository member list.

Repository views — Like a space, each repository has its own tab within CenterStage. The layout of the repository tab is similar to a space tab, with **Content** view, **Search** view, and **Members** view, but no **Tag** view or **Templates** view.

To display a different view of a repository, click an icon in the view panel of the repository tab, as follows:

Icon	Description	Help topic
	**Content** view, to browse repository content	Navigate content of a space or repository, page 67

Icon	Description	Help topic
	Search view, to discover repository content by using search strings or filters	Search for repository content, page 62
	Members view, to display repository members	View repository members, page 63

Related topics

- View a repository, page 62
- View repository members, page 63

View a repository

To view a repository:

1. Do one of the following:
   - In the view panel of the **My Community** tab, click ***Repository Name***.

     The **My Community** tab displays **Repository** view and lists the top-level cabinets in the repository.
   - In **Repository** view of the **My Community** tab, click a cabinet (***Cabinet Name***).

     The repository tab opens in **Content** view, and displays the contents of the cabinet.
   - From the **My Community** menu in the top CenterStage toolbar, select the repository ().

     The repository tab opens in **Content** view, and displays the top-level cabinets in the repository.
   - Navigate to a repository item by clicking it in a contents widget or in search results, or by following a URL (either by selecting bookmark, clicking a hyperlink, or entering a URL in your browser's address field).

In **Content** view of a repository, you can navigate and access repository content, as described in Navigate content of a space or repository, page 67.

Related topics

- Chapter 3, Repositories
- My Community tab, page 26

Search for repository content

Searching for content in a repository is similar to searching for content in a space.

Global search for repository content

The local repository can be included in a global search by selecting in **Entire site** as a scope in the Search fly-out panel. In this case, all content in the site (repository) is searched either in CenterStage or out of CenterStage.

Search within a repository

Searching within a repository works the same as searching within a space, with the following exceptions:

- Filter values do not appear until you enter a search term.
- The **Format** filter has no choices for wiki, blog, or discussion.
- The filters **Place in text**, **People in text**, and **Organization in text** are unavailable for repository items
- No results appear until you enter a search term.

Related topics

- Chapter 3, Repositories
- Search for global content, page 111
- Search within a space, page 113

View repository members

To view repository members:

1. Open content view of a repository, as described in View a repository, page 62.
2. In the repository view panel, click  .

Related topics

- Chapter 3, Repositories

Create new users in a repository

If you are a user manager (that is, you are in the dce_user_manager role in the repository), you can create new "inline user" accounts to add to a repository.

Note: Do not create an account for someone if they already have one.

To create new users in a repository:

1. Open **Members** view of a repository, as described in View repository members, page 63.
2. Click **New user account**.
3. Complete the **New User Account** dialog box, as follows:

Control/Field	Description/Action
Name	The member name, which must be unique in the repository.
Login name	The member name used at sign-in, which must be unique among inline users in the repository.

Control/Field	Description/Action
Email	The member e-mail address.
Password	Read-only field. The password is generated automatically.

4. Click **Create Account** to create the new user in the repository.

New users appear in the list of members in all public spaces in the repository, but without the roles from any spaces.

Related topics

- Chapter 3, Repositories
- Chapter 17, Space Membership

View or edit repository settings

The control to view or edit repository settings (**Repository Settings**) is visible only to site administrators with superuser privileges.

To view or edit repository settings:

1. Right-click the repository tab and select **Repository Settings** from the shortcut menu.

   The Repository Settings dialog box displays the Content Policy tab only. CenterStage uses a single content policy for an entire repository. An administrator can customize the content policy separately from all other policies.

2. Since defining content policies for a repository is the same as for a space, complete the Content Policy tab as described in the procedure *To view or edit space content policy* in Content policy, page 55.

3. Do one of the following:
   - Click **Save** to put content policy changes into effect and close the **Repository Settings** dialog box.
   - Click **Cancel** to discard your changes and close the **Repository Settings** dialog box.

Related topics

- Chapter 3, Repositories

Close a repository

To close a repository, click on the repository tab.

Related topics

- Chapter 3, Repositories

Chapter 4

Browse Content

You browse content in CenterStage in the following ways:

Action	Help topic
Navigate the content library of a space, or the content of the repository.	Navigate content of a space or repository, page 67
Discover content using search.	Search within a space, page 113
Discover content using tags.	View tags for a space, page 123
View spaces, the local repository, new items in CenterStage, items you are editing, and all recent activity.	My Community tab, page 26
Preview content.	• Preview panels, page 27 • View a file page, page 71
View an item page (space, repository or repository item, file, folder, discussion, discussion topic, blog, blog post, wiki, wiki page, data table, data table entry).	View an item page, page 126
Subscribe to content.	Subscribe to content, page 74
Share content.	Share content, page 41
Watch content.	• Watch content, page 74 • Stop watching content, page 75

Navigate content of a space or repository

To navigate content:

1. Open **Content** view of a space or repository, as described in Content view of a space, page 50, or View a repository, page 62, respectively.
2. In **Content** view, do one of the following:
   - In the navigation tree, click a folder or other container to show its contents in the **Content** area.

Note: In the navigation tree, you can show or hide nested containers (folders, wikis, blogs, discussions, data tables, or data table entries) without changing the contents displayed in the **Content** area. To do so, use the toggle control as follows:

— Click to expand an item. Displays up to 99 child items. A message appears if there are more than 99 children. When a container has no children, the toggle control disappears.

— Click to collapse an item that is expanded.

- Double-click an icon in the **Content** area.
- Click a link in the breadcrumbs.

  Each element in the breadcrumbs is a link to the named page, including the name of a file page. Click the name of the space to go to the space home page. Click **Content** to go to the root level of **Content** view.
- Preview content, as described Preview panels, page 27 and View a file page, page 71.
- View an item page, as described in View an item page, page 126.

Related topics

- Chapter 4, Browse Content

View recently modified files

Task	Action
View all recently modified files in a particular space.	Go to any page containing a recent activity widget.
View all recently modified files in all your spaces.	Do the following: 1. Select the **My Community** tab. 2. Select **Recent Files**.
View a list of recently modified files while you are outside of CenterStage.	Use **Subscribe** or **Start Watching** on the container that the files are in.
View all your checked-out files.	Go to **Items I am Editing** in the **My Community** tab.
View all files in a space.	Go to the **Search** view of a space and select all the formats you want in the Format category.

Related topics

- Chapter 4, Browse Content
- My Community tab, page 26
- Page widget types, page 132
- Search within a space, page 113

View a folder

A folder page displays the contents of a folder, a welcome message, folder tags (space folders only), and folder comments (for repository folders, if comments are allowed). To view a folder page, do one of the following:

Action	Context
• Click the folder name. • Pause the cursor over the folder icon, and then click **View** in the preview panel.	• In the content area of a space or repository in **Content** view • In **Attachments** view of a data table, or in the **Attachments** field (if any) of a data table entry in view mode • In search results • In **Tag** view of a space • In a **Contents** or **Recent Activity** widget • **All Recent Activity** view on the **My Community** tab
Double-click the folder icon.	• In the content area of a space or repository in **Content** view • In **Attachments** view of a data table, or in the **Attachments** field (if any) of a data table entry in view mode • In search results • In **Tag** view of a space • In a **Contents** widget
• Select the folder and then click **View Folder** in the page toolbar. • Right-click the folder and select **View Folder** from the shortcut menu.	• **Content** area of a space or repository in **Content** view • **Attachments** view of a data table, or in the **Attachments** field (if any) of a data table entry in view mode • In search results • In a **Contents** or **Recent Activity** widget

Note: In details, thumbnails, or slides view, a folder page displays up to 25 items per page. To see more items on additional pages, use the pagination controls in the bottom status bar.

On a folder page, the following actions are available, if you have the appropriate permissions:

Folder toolbar	More menu	Folder Actions	Other actions
• To add new items, use the **New** menu on the folder toolbar. • Click **View** to open an item page. • To view a file in its native application: — With no plug-ins installed, click **Download File**. — With the plug-ins installed, click **Open File**. • Click **Edit *Item*** to lock and begin editing an item. • Click **Cancel Editing** to discard your changes and remove the editing lock. • Click **Unlock** an item to release the editing lock. This option is only available if you are a space coordinator.	• **Share *Item*** • **Cut** • **Copy** • **Paste** • **Paste as Link** • **Rename** • **Delete *Item*** • **Select All** • **Lifecycle** • **Properties**	• **Print** • **Delete Folder** • **Share Folder** • **Subscribe to Folder** • **Start Watching Folder** • **Lifecycle** • **Folder Properties**	• View the preview panel for an item, as described in Preview panels, page 27. • View, add, or edit tags (CenterStage folders only), as described in Chapter 9, Tags. • With appropriate permissions, and, for repository folders with comments allowed, view and add comments, as described in Comment on content, page 37. • Hide or show the **Comments** area (for repository folders, if comments are allowed).

Note: Actions available on the folder toolbar and on the **More** menu are also available on the shortcut (right-click) menu for items you have selected.

Related topics

- Edit a file, page 99
- Copy items, page 81
- Move items, page 87
- Drag and drop items, page 92
- Delete items, page 96

- View or edit item properties, page 102
- Subscribe to content, page 74
- Watch content, page 74
- Chapter 19, Versioning
- Chapter 21, Lifecycles

View a file page

A file page displays information about a file that can help you decide whether to view or edit the content of a file. Also, on a file page you can perform actions on a file such as comment on it, tag it, share it, and view the file history.

The file page displays the following:

- Comments, if any – for a repository item, only if comments are allowed
- Tags, if any – CenterStage items only
- Summary of properties – when added and by whom, last changed and by whom, and version number
- Content preview that you can enlarge to full-screen mode – supported file formats only

To view a file page:

1. Open a space as described in View a space, page 49, or view a repository as described in View a repository, page 62.
2. Do one of the following:

Action	Context
Click the file.	On the **My Community** tab, in one of the following views: • **All Recent Activity** view • **Recent Files** view
Pause the cursor over the file icon, and then click **Preview and Comment** in the preview panel.	• On the **My Community** tab, in one of the following views: — **All Recent Activity** view — **Recent Files** view • In the **Content** area of a space or repository in **Content** view • In **Attachments** view • In search results

Action	Context
	• In a **Contents** or **Recent Activity** widget
• Select the file and click **Preview and Comment** in the page toolbar. • Right-click the file and select **Preview and Comment** from the shortcut menu.	• In the **Content** area of a space or repository in **Content** view • In **Attachments** view • In search results • In **Tag** view of a space • In a **Contents** or **Recent Activity** widget

Actions you can perform on a file page, as long as you have the appropriate permissions, are as follows:

File Actions	Other actions
• **Download File** (without plug-ins); **Open File** (with plug-ins) • **Edit File** • **Import New Version** • **Print** • **Delete File** • **Share File** • **Subscribe to File** • **Start Watching File** • **Show History** (if on the file page) • **Show Page** (if on the **History** page) • **Lifecycle** • **File Properties**	• View, add, or edit file tags (for CenterStage files only), as described in Chapter 9, Tags. • View and add file comments (for repository files, only if comments are allowed) as described in Comment on content, page 37. • Hide or show the **Comments** area. • Display file versions by clicking the **History** link in the page header or footer. • Use viewer widget controls to navigate through a series of pages or images. • Display pages or images in full-screen mode by clicking in the lower right corner of the page. **Note:** Full-screen display of pages and images requires the optional purchase of additional components that generate high-quality, enlarged views of pages or images. Otherwise, images are limited to 300x300 pixels in size. See your system administrator for details.

Related topics

- View a file, page 73
- Edit a file, page 99
- Copy items, page 81

- Move items, page 87
- Drag and drop items, page 92
- Delete items, page 96
- View or edit item properties, page 102
- Subscribe to content, page 74
- Watch content, page 74
- Chapter 19, Versioning
- Chapter 21, Lifecycles

View a file

To open a read-only view of a file in its native application, do one of the following:

Action	Context
Pause the cursor over the file icon. In the preview panel, click one of the following: • **Download File** (without plug-ins) • **Open File** (with plug-ins)	On the **My Community** tab, in one of the following views: • **All Recent Activity** view • **Recent Files** view
• Double-click the file icon. • Select the file. In the page toolbar, click either **Download File** or **Open File**. • Pause the cursor over the file icon. In the preview panel, click either **Download File** or **Open File**. • Right-click the file. From the shortcut menu, select either **Download File** or **Open File**.	• In the **Content** area of a space or repository in **Content** view • In **Attachments** view • In **History** view • In search results • In **Tag** view of a space • In a **Contents** or **Recent Activity** widget
From the **File Actions** menu, select either **Download File** or **Open File**.	On a file page

Related topics

- View a file page, page 71
- Edit a file, page 99

Subscribe to content

You can subscribe to content and receive web feed notification when changes occur in a space, blog, wiki, discussion, folder, data table, tag, or file. To view feeds, you need an external feed reader. Web browsers, such as Internet Explorer 7 and Firefox, provide built-in feed readers, or you can use the feed reader of your choice.

Repository items
The Subscribe action is unavailable for repository items.

To subscribe to content:

1. Open one of the following items:
   - Space home page, to subscribe to the entire space activity
   - Wiki, blog, data table, or discussion home page, to subscribe to the entire wiki, blog, data table, or discussion
   - Wiki page, blog post, data table entry, or discussion topic, to subscribe to only this page, post, entry, or topic
   - File page
   - Folder page
   - Tag page - To subscribe to a tag page, open the **Tags** view and select a tag. Subscribing to a tag triggers notifications when the tag is added to an item or when an item with this tag is modified. If no tag is selected, the subscription applies to the space home page.
2. Select **Subscribe to *Item*** from the ***Item* Actions** menu.

   Your reader opens and displays the feed.
3. Add the feed to your reader.

To unsubscribe to a CenterStage feed, use the unsubscribe function of your feed reader.

Related topics

- Watch content, page 74
- Search for global content, page 111

Watch content

You can watch content and receive e-mail notifications when changes occur in a space, blog, wiki, discussion, folder, data table, tag, or file.

Repository items
Start Watching and **Stop Watching** actions are unavailable for repository items.

To start watching content:

1. Open one of the following items:
   - Space home page
   - Discussion, blog, wiki, or data table home page
   - Discussion topic, blog post, wiki page, or data table entry
   - File page
   - Folder page
   - Tag page
2. Select **Start Watching *Item*** from the ***Item* Actions** menu.

You receive e-mail notifications about content you are watching according to the frequency you specify in preferences, given the following choices:

- **As soon as the content is modified** - one e-mail notification per item
- **On a daily basis** - one e-mail notification per day that includes all changes for all items you are watching, grouped by spaces
- **On a weekly basis** - one e-mail notification per week that includes all changes for all items you are watching, grouped by spaces

To modify your preferences, see Set personal preferences, page 43.

To start watching a space:

1. Open a space.
2. Right-click the space tab and select **Start Watching Space** from the shortcut menu.

Related topics

- Subscribe to content, page 74
- Stop watching content, page 75
- Search for global content, page 111

Stop watching content

When you choose to watch content, you receive e-mail notifications when changes occur in a space, blog, wiki, discussion, folder, data table, tag, or file. When you decide these notifications are no longer relevant, you can change your settings to stop watching content.

Repository items

Start Watching and **Stop Watching** actions are unavailable for repository items.

To stop watching content:

1. Open the item you are watching. It can be any of the following:
   - Space home page
   - Discussion, blog, wiki, or data table home page

- Discussion topic, blog post, wiki page, or data table entry
- File page
- Folder page
- Tag page

2. Select **Stop Watching *Item*** from the ***Item* Actions** menu.

You can also modify the frequency with which you are notified of changes as described in Set personal preferences, page 43.

Related topics

- Subscribe to content, page 74
- Watch content, page 74
- Search for global content, page 111

Chapter 5

Add Content

To add content to a space or repository, you can either import content, copy content, or create items, as described in the following topics:

- Import files, page 77
- Copy items, page 81
- Add a folder, page 79
- Add a blog, page 164
- Add a wiki, page 154
- Add a discussion, page 174
- Add a data table, page 189

Import files

To import content, you must have appropriate permissions for a space or repository location. To import multiple files at the same time, you must have the associated CenterStage plug-ins installed, as described in Install plug-ins, page 25.

The space or repository content policy defines the rules for importing content. See Content policy, page 55.

To import files:

1. To import content, do one of the following:

Action	Context
Right-click a space, repository, cabinet, room, or folder and select **New** > **Import Files**.	In the navigation tree of a space or repository in **Content** view
Select **New** > **Import Files** from the page toolbar.	• In the **Content** area of a space, repository, cabinet, room, or folder in **Content** view • In **Attachments** view of a wiki, page, blog, post, discussion, topic, or data table

Action	Context
	• In the **Attachments** field (if any) of a data table entry in view mode

Note: Without the plug-in, the command for importing one file at a time is **Import File**.

2. Complete the import process by doing one of the following:

   With plug-ins

   1. In the **Import Files** dialog box, click **Add files to import list** to select the initial file to import.
   2. To select the next and subsequent files to import, click to select each file.

      Note: To remove a file from the **Files to Import** list, select the file and then click .
   3. When you have selected all the files you want to import, click **OK**.
   4. When you return to the **Import Files** dialog box, provide values for any required fields.
   5. Click **OK** to import the files.
   6. The first time you use the plug-in, you are asked whether you trust the CenterStage site. You can safely click **Yes** in response to the prompt.

   Without plug-ins

   1. In the **Import Files** dialog box, click **Browse** to select a file.
   2. When you return to the **Import Content** dialog box, click **OK** to import the file.
   3. At the prompt, click **Yes** to import another file.
3. If there is a naming conflict with another file in the import location, do one of the following:
   - Import the file and give it a different name.
   - Import a new version of the existing file. See Add a new file version, page 236.

Related topics

- Chapter 5, Add Content
- Add an attachment to a page, page 214

Chapter 6

Organize Content

To organize content in a space or repository, you can create folders for storing items, copy, move, drag-and-drop, paste items as links, or delete items, as described in the following topics:

Folders in a space — Folders in a space can contain files, data tables, wikis, blogs, discussions, and other folders. You can subscribe to a folder, watch a folder, and tag a folder.

Folders in a repository — Folders in a repository can contain files and other folders. A repository folder has no controls for tagging, and no comments panel unless the option to allow comments is activated for the folder.

Add a folder

You can add a folder at the top-level of a space, or within any of the following containers: cabinet (repository only), room (repository only), folder, data table, or data table entry.

To add a folder:

1. Navigate to where you want to add the folder.
2. Do one of the following:

Action	Context
Right-click a cabinet, a room, a folder, or the top node of the content library in a space, and then select **New** > **Folder** from the shortcut menu.	In the navigation tree of a space or repository in **Content** view
Select **New** > **Folder** in the page toolbar.	• In the content area of a cabinet, a room, a folder, or the top level of the content library in a space • In **Attachments** view of a data table • In an **Attachments** field (if any) of a data table entry in view mode

3. Complete the **Create Folder** dialog box as follows:

Field / Control	Action
Name (required)	Type a name for the folder.
Icon	To change the default icon, click to open a gallery of folder icons, and then select one.
Welcome message (optional)	Write a message to appear at the top of the folder page.

4. Click **OK**.

Tip: To modify the welcome message (if any), edit the properties of the folder, as described in View or edit folder properties, page 107.

Folder permissions

By default, CenterStage folders share the permissions of their parent. Folders and files created at the top level of a space share the space permissions. Descendant subfolders and files share the same permissions. If you customize the permissions of a folder, however, the folder becomes a *security container* and no longer shares the space permissions. Folders and files created in such a folder share the permissions of the security container, unless their permissions are customized. Any data tables, discussions, or wikis created in the security container get a copy of the folder's permissions.

Like other repository items, permissions of folders created in a repository location are controlled by the repository, and not by CenterStage. Space members can see only their own permissions for repository items.

Related topics

- View or edit folder properties, page 107
- View or edit item permissions, page 105
- Chapter 15, Data Tables
- Chapter 16, Attachments

Copy items

You can copy and paste any items for which you have at least Read permission, in any location for which you have permission to add items.

To copy items:

1. Select the items to copy, and then do one of the following:
   - Right-click and select **Copy** from the shortcut menu.
   - Select **More >** **Copy** on the page toolbar.
   - Drag the items.

     Note: To drag a data table entry, you must click in the title field of an entry, and then drag.
2. Do one of the following to paste the item to a different location:
   - Right-click and select **Paste** from the shortcut menu.
   - Select **More >** **Paste** on the page toolbar.

   You can copy items to the following locations.

Copied item	Source location	Target location		Results
		Space	Repository	
Wiki Blog Discussion Data table	Space	• Space root • Folder • Data table (tree node or Attachments view) **Note:** While you cannot copy a data table into its own attachments area, you can copy it into a container inside its own attachments area. • Data table entry (tree node or Attachments field)	Not allowed	• Item and all descendants are copied. • Item name is disambiguated, if needed. • Any child links are copied as new items, not links. • Permissions of item, children, and attachments may be affected.

Copied item	Source location	Target location		Results
		Space	Repository	
		Anywhere else in a space is not allowed		
Page Post Topic	Space	The corresponding parent item (wiki, blog, or discussion) Anywhere else in a space is not allowed.	Not allowed	• Item and all descendants are copied. • Item name is disambiguated, if needed. • Any child links are copied as new items, not links. • Permissions of item and attachments may be affected.
Data table	Repository	• Space root • Folder • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	• Folder • Cabinet • Room • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a repository is not allowed.	• Repository data table and all descendants are copied. • Repository data table name is disambiguated, if needed. • Any child links are copied as new items, not links. • Permissions of repository data table, entries, and attachments are

Copied item	Source location	Target location		Results
		Space	Repository	
				determined by repository rules.
Entry	Space or repository	Data table (tree node or home page) with unlocked schema and at least one field matching the source data table Anywhere else in a space is not allowed.	Not allowed	• Entry and all descendants are copied. • Entry name is not disambiguated. • Text in the new entry may be truncated if it came from a rich-text field that is matched to a plain text field. • A field in the new entry that has no match in the original entry is left blank, even if it is a required field. • Any child links are copied as new items, not links. • If entry is copied from the repository, permissions of entry and attachments are affected.

Copied item	Source location	Target location		Results
		Space	Repository	
Folder	Space or repository	• Space root • Folder • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	• Folder, cabinet, room • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in the repository is not allowed.	• Folder and all descendants are copied. • Folder name is disambiguated, if needed. • If folder is copied from a space to the repository, controls for some features will be disabled. • If folder is copied from the repository to a space, controls for some features will be enabled. • Any child links are copied as new items, not links. • Permissions of folder and children may be affected.
File	Space or repository	• Space root • Folder • Wiki, blog, discussion, or data table (tree node or Attachments view of these)	• Folder, cabinet, room • Data table (tree node or Attachments view) • Data table entry (tree	• File is copied. • File name is disambiguated, if needed. • If file is copied from repository to space,

Copied item	Source location	Target location		Results
		Space	Repository	
		• Page, post, topic (tree node or Attachments view of these) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	node or Attachments field) Anywhere else in the repository is not allowed.	controls for some features will be enabled. • If file is copied from space to repository, controls for some features will be disabled. • Permissions of the file may be affected.

Copying multiple items proceeds even if some of the items fail to copy, the reason for which is explained in an error message when the copy is finished.

The following information is copied with items:

Item type	Included information	Excluded information
Page	• Page URL • Current version of the page and its properties • All widgets on the page • The current version of all attachments to the page (including links, where the link is not the only instance of the file) • All comments	• Previous versions of the page • Previous versions of attachments to the page • The lock status of the page (the new page is always unlocked) • Properties – Reset as follows: — **Owner** is the active user. — **Created** and **Last Modified** dates are the current date. — **Lifecycle** is reset to the default lifecycle and state for that type of item. • The versioning policy – The new page inherits the default versioning policy from the target location. If the default policy is manual,

Item type	Included information	Excluded information
		then the files get a policy of auto-versioning, next minor version. • Permissions – The new page and all its attachments share the parent ACL. Custom ACLs are overwritten.
File	• File URL • Current version of the file • Properties • Comments	Same as for a page
Folder	• Folder URL • Comments on the folder • Files and folders in the folder	Same as for a page, except versions, versioning policy, and locked status do not apply to folders
Wiki	• Wiki URL • Current version of all attachments to the wiki home page • All comments on the wiki home page • Current version of all pages in the wiki • Current version of all attachments to all pages in the wiki	Same as for a page
Blog	Same as for a wiki, except all blog posts are copied with the blog	Same as for a wiki
Discussion	Same as for a wiki, except all discussion topics are copied with the discussion	Same as for a wiki

Item type	Included information	Excluded information
Data table	• Data table URL • All data table entries • Data table schema • Column preferences for the summary view • Filter status • Current version of all attachments to all data table entries in the data table	Same as for a wiki, except for versions and the versioning policy, plus: • Contents of the change log, if a history widget is part of the schema. (The history widget is copied without the change log items.) • Autonumber data
Data table entry	Same as for a page, except: • Data table entries do not have versions so there is no version information to copy • Current values for all fields	Same as for a page, except no versions or versioning policy

The copied item inherits the name of the original item, unless there is a naming conflict in the new location. If the name conflicts with another item of the same type, CenterStage appends the item name with the string *copy*, *copy* 2, and so on.

Related topics

- Move items, page 87
- Drag and drop items, page 92

Move items

You can move any items for which you have the needed permissions, between two locations where you are permitted to remove and to add (respectively) items.

To move items:

1. Select the items to move and do either of the following:
   - Right-click and select **Cut** from the shortcut menu.
   - Select **More >** **Cut** on the page toolbar.
2. Go to where to move the items, and then do either of the following:
   - Right-click and select **Paste** from the shortcut menu.
   - Select **More >** **Paste** on the page toolbar.

   You can move items to the following locations.

Moved item	Source location	Target location		Results
		Space	Repository	
Wiki Blog Discussion Data table	Space	• Space root • Folder • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed	Not allowed	• Item is moved. • Item name is disambiguated, if needed. • Permissions of item, children, and attachments may be affected.
Page Post Topic	Space	The corresponding parent item (wiki, blog, or discussion) Anywhere else in a space is not allowed.	Not allowed	• Item is moved. • Item name is disambiguated, if needed. • Permissions of item and attachments may be affected.
Data table	Repository	• Space root • Folder • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	• Folder, cabinet, room • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a repository is not allowed.	• Repository data table is moved. • Repository data table name is disambiguated, if needed. • When moving to a space, controls for comments, tags, subscribing and watching are enabled

Moved item	Source location	Target location		Results
		Space	Repository	
				for all moved items • Permissions of repository data table, children, and attachments are affected either by default space creation rules or by repository rules.
Entry	Space or repository	Not allowed	Not allowed	
Folder	Space or repository	• Space root • Folder • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	• Folder, cabinet, room • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in the repository is not allowed.	• Folder is moved. • Folder name is disambiguated, if needed. • If folder is moved from a space to the repository, controls for some features will be disabled. • If folder is moved from the repository to a space, controls for some features will be enabled. • Permissions of folder and

Moved item	Source location	Target location		Results
		Space	Repository	
				children may be affected.
File	Space or repository	• Space root • Folder • Wiki, blog, discussion, or data table (tree node or Attachments view of these) • Page, post, topic (tree node or Attachments view of these) • Data table entry (tree node or Attachments field) Anywhere else in a space is not allowed.	• Folder, cabinet, room • Data table (tree node or Attachments view) • Data table entry (tree node or Attachments field) Anywhere else in the repository is not allowed.	• File is moved. • File name is disambiguated, if needed. • If file is moved from repository to space, controls for some features will be enabled. • If file is moved from space to repository, controls for some features will be disabled and its version policy is removed. • Permissions of the file may be affected.

Multiple items continue to move even if some of the items fail to move for reasons explained in an error message when the move completes.

Cut items remain in their original location in the following cases:

- You cancel a move
- You put another item on the clipboard before pasting
- The move fails
- You end the session without pasting, and the clipboard is cleared

The following information is moved with items:

Item	Included information
File	• File URL • All file versions • Properties • Comments • The versioning policy • Permissions
Folder	• Folder URL • All comments • The versioning policy • Permissions • Folders, and all versions of files in the folder
Page	• Page URL • All page versions • All widgets on the page • All page attachments, and all their versions, comments, and properties • Comments • Properties • The versioning policy • Permissions
Wiki	• Wiki URL • The wiki properties • The versioning policy for the wiki • Permissions • Comments on the wiki home page • All versions of all attachments to the wiki home page • All versions of all pages in the wiki

Item	Included information
Blog	Same as for a wiki, except that all blog posts are moved with the blog
Discussion	Same as for a wiki, except that all discussion topics are moved with the discussion
Data table	• Data table URL • All data table entries • Data table schema • Column preferences for the summary view • Filter status • All attachments to the data table, and all their versions, comments, and properties • All entries in the data table, and the change log for each entry if the History widget is part of the schema • All attachments to entries, and all their versions, comments, and properties

The moved item inherits the name of the original item, unless there is a naming conflict in the new location. If the name conflicts with another item of the same type, CenterStage appends to the item name the string *copy*, *copy* 2, and so on.

Related topics

- Copy items, page 81
- Drag and drop items, page 92

Drag and drop items

You can copy and move files and other items by dragging and dropping them from one location to another.

You can also drag and drop items from or to nodes in the same navigation tree, and from or to any Contents widget. Drag and drop to or from your desktop or the local file system is not, however, supported.

Sections can be dragged and dropped to Folders, Data Tables, and Data Table entries in the tree and contents datagrids. Children of sections can be dragged and dropped to other sections of the same type in the tree and contents datagrid. You cannot create links to sections, so you will get the ususal error if you try. See errors when dragging and dropping below.

To drag and drop items:

1. Select one or more items.

2. Click the item or items, and while continuing to hold down the mouse button, drag to the drop target, in one of the following ways:
    - Pause the cursor over a space tab. The tab comes forward and **Content** view appears. In **Content** view, drag to a valid target that is in view.
    - In the navigation tree for a space in **Content** view, pause the cursor over any container that shows a button, and the node expands to show any child container items.
3. Release the mouse button.

    Note: When you drop into the same space, the default behavior is "move"; when you drop into a different space, the default behavior is "copy." Using a modifier key, such as **Shift** or **Ctrl**, overrides these default behaviors.

The drop target can be any valid container, as follows:

Item	Action	Source location	Valid target locations	Invalid target locations
Wiki Blog Discussion Data table	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree • Contents datagrid/ folder • Attachment view of data table • Attachment field of data table entry	• Space root • Space folder in tree or contents datagrid • CenterStage data table in tree or contents datagrid • CenterStage data table entry in tree or summary view of data table	• Any other section in tree or contents datagrid (wiki, discussion, blog) • A child of any other section in tree or contents datagrid (page, topic, post) • Repository
Folder	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree • Contents datagrid/ folder • Attachment view of data table • Attachment field of data table entry	• Space root • Space folder in tree or contents datagrid • Data table in tree or contents datagrid • Data table entry in tree or summary view of data table • Repository	• Any other section in tree or contents datagrid (wiki, discussion, blog) • A child of any other section in tree or contents datagrid (page, topic, post)

Item	Action	Source location	Valid target locations	Invalid target locations
Page	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree • All Pages view of wiki	• A wiki in tree or contents datagrid • Can copy/paste via **Ctrl**-drag and drop into parent	• Current parent wiki • Any other section, child, or folder • Repository
Topic	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree • Discussion home page grid of topics	• A discussion in tree or contents datagrid • Can copy/paste via **Ctrl**-drag and drop into parent	• Current parent discussion • Any other section, child, or folder • Repository
Post	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree	• A blog in tree or contents datagrid • Can copy/paste via **Ctrl**-drag and drop into parent	• Current parent blog • Any other section, child, or folder • Repository
Entry	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree • Data table summary view	• A data table in tree or contents datagrid • Can copy/paste via **Ctrl**-drag and drop into parent	• Repository
File	• Drag and drop • **Ctrl**-drag and drop • **Shift**-drag and drop	• Navigation tree	• Space root • Folder in tree • Section in tree • Child of section in tree • Repository	

The dropped item inherits the name of the original item, unless there is a naming conflict in the new location. If the name conflicts with another item of the same type, CenterStage appends to the item name the string *copy*, *copy 2*, and so on.

Related topics

- Copy items, page 81
- Move items, page 87

Paste items as links

Create links to items to avoid needless duplication of information. You can link to the following items:

- Files or folders copied from any space in the current site
- Files not belonging to a space, copied from the current repository
- Files copied from another repository, regardless of whether it is from an existing space
- Existing links

Links are permitted for files and folders, from a space or the repository, to a space or the repository. Only a single folder or a single file can be linked at a time. You cannot link a wiki or page, blog or post, discussion or topic, data table or entry.

You can paste a link in any location for which you have permission to add items.

To paste a link:

1. Select an item to copy and do one of the following:
   - Right-click and select **Copy** from the shortcut menu.
   - Select **More >** **Copy** on the page toolbar.
   - Drag the link.
2. If you copy with the **Copy** command, do one of the following:
   - Select **More > Paste as Link** on the page toolbar.
   - Right-click a space or folder in the tree and select **Paste as Link**. The link is added as a child of the container.
   - Right-click a blog, discussion, or wiki in the tree and select **Paste as Link**. The item is added as an attachment to the item home page.
   - Drop the link. A new link is created in the new location.

A copy of a link has a unique name among all other items in the new location. If there is a naming conflict, CenterStage appends to the file name the string *copy*, *copy 2*, and so on.

Related topics

- Chapter 6, Organize Content

Delete items

You can delete an item if:

- You have Delete permission for a folder, wiki, blog, discussion, or data table, and for all its descendants.
- You have Delete permission for a file and for all its versions.
- You are permitted to remove items from a location.

Note: Repository cabinets cannot be deleted using CenterStage.

To delete an item:

1. Do one of the following:

Action	Context
Select **Delete *Item*** from the ***Item* > Actions** menu.	On the item home page.
Right-click the item and select **Delete *Item*** from the shortcut menu.	• In the navigation tree in **Content** view of a space • In **Content** view of a space, with the **Content** area displaying the root of the content library • In **Search** view of a space, or on a search tab • In **Tag** view of a space • In **Attachments** view • In a **Contents** widget
Select multiple items, right-click, and then select **Delete** from the shortcut menu.	• In **Content** view of a space, with the **Content** area displaying the root of the content library • In **Search** view of a space, or on a search tab • In **Tag** view of a space • In **Attachments** view • In a **Contents** widget

Action	Context
Select the item, and then select **More >** **Delete** ***Item*** in the page toolbar.	• In **Content** view of a space, with the **Content** area displaying the root of the content library • In **Search** view of a space, or on a search tab • In **Attachments** view
Select multiple items, and then select **More >** **Delete** in the page toolbar.	• In **Content** view of a space, with the **Content** area displaying the root of the content library • In **Search** view of a space, or on a search tab • In **Attachments** view

Note: Actions in the context of **Content**, **Search**, **Tag**, and **Attachments** views apply to details or thumbnails view only.

2. In the **Delete *Item*?** dialog box, click **OK** to confirm that you want to delete the selected items, and all of the associated attachments and versions, permanently. For multiple items, select the checkbox labeled **Delete these items and all children in them** before clicking **OK**.

Related topics

- Chapter 6, Organize Content

Chapter 7

Modify Content

You modify content by editing files, topics, posts, pages, or data table entries, or by changing the properties and permissions for items, as described in the following topics:

Edit a file

To edit a file:

1. Select the file to edit, display the preview panel, or open the file page.
2. Click **Edit File** in either the toolbar or the preview panel.
   - If you are using the plug-in, the file opens in its native application, and is checked out of the repository.
   - If you are not using the plug-in, your browser displays a dialog box in which you can decide whether to open the file in its native application or save it to a location on your computer.

     Tip: Save the file to a location where you can easily find it when you are ready to upload a new version.

   While you have a file open for editing, it is locked so that others cannot edit it. A key symbol appears in the header of the file page and next to its name in any list that includes the file (a folder page, recent activity, history view, and so on).

3. Modify the document and save your changes.
   - If you are using the plug-in, CenterStage automatically imports the new version when you close the native application, and checks the file into the repository.
   - If you are not using the plug-in, do the following to update the file in CenterStage:
     1. Right-click the file and select **Import New Version** from the shortcut menu.
     2. Click **Browse** to locate and select the file to be the new version.

   Depending on the versioning policy in effect for the space, as described in Space versioning policy, page 56, one of the following occurs:
   - The new version overwrites the older version.
   - The new version is either automatically or manually assigned a new version number. If you manually assign a version number, you have the option of adding a version note. If the version number is automatically assigned, you can add a version note to the **Version** tab in file properties, as described in View or edit file properties, page 106.

   When importing a new version of a repository document, you can choose **Major** or **Minor** (default choice).

Note: If you are using the plug-in, and you select **Import New Version** for a file that you have locked for editing but have not yet saved, you have the following options:

- **Browse for new content** – Opens the **Import New Version** dialog box in which you can select a different local file for uploading, and specify the new version information.
- **Upload working content** – Opens the **Import New Version** dialog box in which you can specify the new version information for uploading the file in its current state.

Both actions upload a new version and release the editing lock on the file so that others can edit it.

Tip: Suppose you edit a file, save it locally, and later want to check it in but you cannot remember where you saved it. In this case, you can open **Items I am Editing** in the **My Community** tab to see items you have locked for editing, in all spaces to which you belong.

Related topics

- View a file page, page 71
- View a file, page 73
- Chapter 7, Modify Content
- Cancel editing, page 100
- Resume editing, page 101

Cancel editing

If you navigate away from a page you are editing, CenterStage automatically saves a draft version of the page so you can cancel or resume editing later. While you have an item locked, a key symbol appears next to the item icon in a list of items. You can discard any unsaved (or draft version) changes and release the editing lock so that others can edit it.

To cancel editing for an item, do one of the following:

Action	Context
Click **Cancel Editing** in the item toolbar.	On an item page, while the page is in edit mode.
Right-click the item and select **Cancel Editing** from the shortcut menu.	• On the **My Community** tab, in **Items I am Editing** view. • In the navigation tree in **Content** view of a space • In the **Content** area of a space home page or a folder • In the **Results** area of a space or a repository in **Search** view, or on a search tab • In **Attachments** view • In a Contents widget
Display the item preview panel, and then click **Cancel Editing**.	• On the **My Community** tab, in **Items I am Editing** view. • In the **Content** area of a space home page or a folder • In the **Results** area of a space or a repository in **Search** view, or on a search tab • In **Attachments** view • In a Contents widget

Related topics

- Chapter 7, Modify Content
- Resume editing, page 101

Resume editing

If you navigate away from a page you are editing, CenterStage automatically saves a draft version of the page so you can cancel or resume editing later. While you have an item locked, a key symbol appears next to the item icon in a list of items. To resume editing, do one of the following:

Action	Context
Right-click the item and select **Resume Editing** from the shortcut menu.	• In the navigation tree in **Content** view of a space • On the **My Community** tab, in **Items I am Editing** view. • In the **Content** area of a space home page or a folder • In the **Results** area of a space or a repository in **Search** view, or on a search tab • In **Attachments** view • In a Contents widget
Display the item preview panel, and then click **Resume Editing**.	• On the **My Community** tab, in **Items I am Editing** view. • In the **Content** area of a space home page or a folder • In the **Results** area of a space or a repository in **Search** view, or on a search tab • In **Attachments** view • In a Contents widget

Related topics

- Chapter 7, Modify Content
- Cancel editing, page 100

View or edit item properties

All items in spaces and the repository have properties:

- Spaces – files, folders, wikis, blogs, discussions, data tables, pages, posts, topics, and data table entries
- Repository – cabinets, rooms, folders, files

Space coordinators, the owner of the item, or members with at least Edit permission to the item can edit item properties. To view item properties, you need at least Read permission.

To open the **Properties** dialog box for an item, do one of the following:

Action	Context
Right-click the item and select *Item* **Properties** from the shortcut menu.	• In the navigation tree in **Content** view of a space • In the **Content** area of a space home page or a folder • In the **Results** area of a space or a repository in **Search and filter** view, or on a search tab • In **Attachments** view • In **All pages** view of a wiki (for wiki pages) • In the list of topics on a discussion home page • In the list of entries on a data table home page • On the **My Community** tab, in one of the following views: — **New in CenterStage** — **Items I am Editing** — **All Recent Activity** — **Recent Pages** — **Recent Posts** — **Recent Topics** — **Recent Files** — **Recent Data Table Entries**
Select *Item* **Properties** from the *Item* **Actions** menu.	• On an item page, as described in View an item page, page 126 • On the **My Community** tab, in one of the following views: — **New in CenterStage** — **Items I am Editing** — **All Recent Activity** — **Recent Pages** — **Recent Posts** — **Recent Topics**

Action	Context
	— Recent Files — **Recent Data Table Entries**
Display the item preview panel, and then click .	• In a **Recent Activity** widget • In a **Contents** widget • In **Attachments** view • On the **My Community** tab, in one of the following views: — **New in CenterStage** — **Items I am Editing** — **All Recent Activity** — **Recent Pages** — **Recent Posts** — **Recent Topics** — **Recent Files** — **Recent Data Table Entries**

In the **Properties** dialog box, you can view or edit item permissions on the **Permissions** tab, as described in View or edit item permissions, page 105.

If the space versioning policy allows it, and if versioning is available for the item, you manage versions settings for a page or file on the **Versions** tab, as described in View or edit page or file version settings, page 237.

Related topics

- View an item page, page 126
- View or edit wiki properties, page 155
- View a wiki page, page 156
- View all pages in a wiki, page 155
- View or edit wiki page properties, page 160
- View or edit blog properties, page 165
- View or edit post properties, page 168
- View or edit discussion properties, page 175
- View or edit topic properties, page 177
- Preview panels, page 27

- View or edit item permissions, page 105
- Permission levels, page 225

View or edit item permissions

You view or edit permissions for an item on the **Permissions** tab of the **Properties** dialog box.

An item permission set (also known as the access control list, or ACL) determines what actions that specific members, groups, and roles can perform on the item. Members, groups, and roles listed on an ACL are the ACL accessors for the item.

For items in the content library of a space, ACL accessors can include the standard roles of **Coordinator** and **Participant**, the **Content Owner**, custom roles in the space, and explicitly added members and groups. All accessors except for the **Content Owner** are optional, and can be removed from the item ACL. The same is true for the space ACL, except that the **Coordinator** role cannot be removed.

The ACL assigned to an item determines the following:

- The users, groups, and roles that can access the item
- The actions each user, group, and role can perform on the item

You grant a member permission to an item in the following ways:

- Add the member to a role (either directly or as part of a group) as described in Change member roles, page 230.
- Add a group containing the member to the item ACL.
- Add the member directly to the ACL.

Note: The item owner, a space coordinator, or a member with at least Delete rights to the item can change the permissions for an item.

Repository items

While you cannot see or change the permissions of a repository item, the **Permissions** tab of the **Properties** dialog box shows your personal rights to the item.

To view or edit permissions for an item in a space:

1. Open the item **Properties** dialog box, as described in View or edit item properties, page 102.
2. View or edit permissions as follows:

Field/Control	Description/Action
Roles	The roles and the corresponding permission to the item
People and Groups	The members or groups and the corresponding permission to the item

Field/Control	Description/Action
Add Member or Role	1. Click to display the **Add Members and Roles** dialog box. 2. Locate and select the members, groups, or roles to add to the item ACL. 3. Click **OK** to select a member, group, or role. The permission table updates to show the members you selected.
Reset to *Item* permissions	Appears only if you have customized permissions to differ from the default space permissions. Click to revert permissions for the item to the space permissions.
View Permissions for Any Member	Click to display the **Choose Members** dialog box and search for a member to view the associated permissions.
(For folders, blogs, wikis, discussions, and data tables) Apply these settings to all *child items* [and attachments] in this *item*	Select to apply the current permissions to one of the following (depending on the parent item): • All items in this folder • All posts in this blog • All pages and attachments in this wiki • All discussion topics and attachments in this discussion • All entries and attachments in this data table

Related topics

- Chapter 18, Permissions and Roles
- Search for members, page 218

View or edit file properties

To edit file properties, you need at least Edit permission for the file. To view file properties, you need at least Read permission.

To view or edit file properties:

1. Open the **File Properties** dialog box as described in View or edit item properties, page 102.
2. On the **General** tab, modify the name of the file, as appropriate.

Note: The space content policy determines the properties that appear. See Content policy, page 55.

3. On the **Version** tab, you can modify the version note for the current version, or, if allowed by space settings, the version policy for the file. See View or edit page or file version settings, page 237 and Space versioning policy, page 56.

4. View or edit settings on the **Permissions** tab, as described in View or edit item permissions, page 105.

5. Click **OK** to save your changes.

Related topics

- Chapter 7, Modify Content
- Chapter 18, Permissions and Roles
- Edit a file, page 99

View or edit folder properties

To edit folder properties, you need at least Edit permission on the folder. To view folder properties, you need at least Read permission.

To view or edit folder properties:

1. Open the **Folder Properties** dialog box as described in View or edit item properties, page 102.

2. Complete or modify the **General** tab as follows:

Field	Action
Name	Modify the name of the folder.
Icon	Click to display available folder icons, and then click to select one of the icons.
Welcome Message (optional)	Write a message that appears at the top of the folder page.
Type	If available, select a custom type of folder, as needed. If a custom type has mandatory properties, then controls for those properties appear in the dialog box. You cannot change the type of a folder once the folder is created.

3. View or edit folder permissions on the **Permissions** tab, as described in View or edit item permissions, page 105.

4. Click **OK** to save your changes.

Related topics

- Chapter 7, Modify Content

Rename an item

To rename an item

1. Switch to details or thumbnails view.
2. Do one of the following:
   - Right-click the item and select **Rename** from the shortcut menu.
   - Select the item, and then select **Rename** from the **More** menu.
3. When the insertion point appears in the name box, type to edit the name.
4. To save your changes, click outside of the name box.

Related topics

- Chapter 7, Modify Content

Chapter 8

Search for Content

This section contains the following topics:

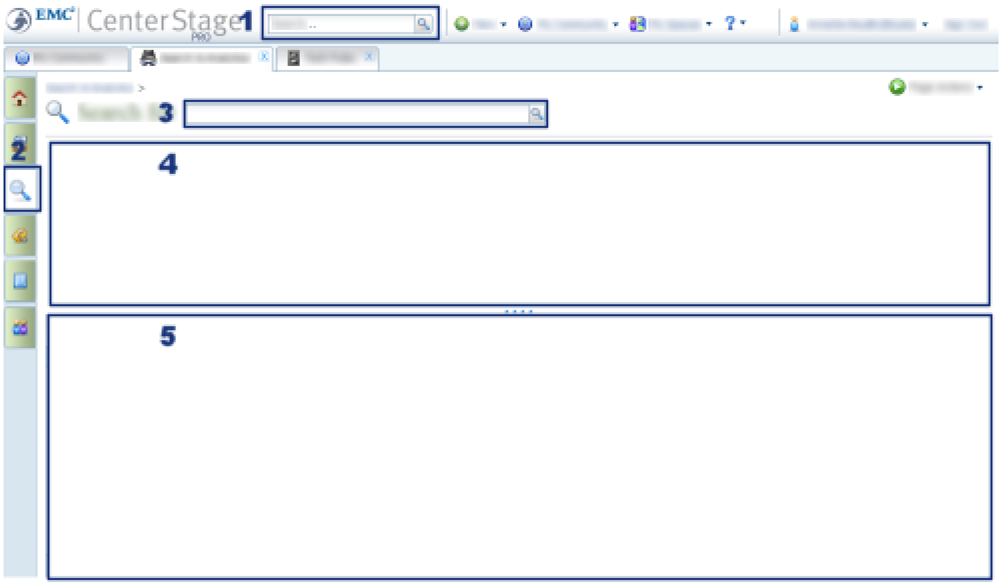
About searching — You can search for content by search expression, by filter, or a combination of both. You can search in the entire site (the repository), the current space, or a set of spaces to locate any item in any space to which you have access. You can also search external sources, called "extra sources," such as other Documentum repositories, eRooms, and Internet websites. There are two main ways to search:

- Search for global content, page 111
- Search within a space, page 113

The following picture identifies the search fields, the filters area and the results area.

1: Search field and search fly-out panel (not visible in this picture) to search for global content
2: Search icon to open the search tab of a space
3: Search field to enter a search expression to search within a space
4: Filters area
5: Results area

Figure 1. Search controls, filters area, and results area



Search index servers — The documents imported to CenterStage and all the content created in CenterStage is indexed to be quickly retrieved by a search. CenterStage supports two index servers: FAST Instream index server, referred to as FAST; and EMC Documentum xPlore index server, referred to as xPlore. In most cases, the search functionality provided by the two index servers is similar. The main differences are the following:

- FAST is usually configured to return only 350 results. xPlore index server can return thousands of results.
- xPlore provides the count of results for each filter value (except for the Topic filter).
- The search syntax is slightly different.

Note: CenterStage Help topics for search features describe the default configuration. In your organization, however, the administrator might implement a different configuration.

Search using expressions — To search for specific text, you enter a search expression made up of text characters, plus any special characters and/or logical Boolean operators to refine your criteria. This type of search is called a full-text search.

See Search expression syntax, page 116.

Search using filters — Search filters are based on characteristics of content that have particular values, such as location, size, or file format. In a search tab or in Search view for a space, filters are displayed above the **Results** area. You can select filter values to narrow the description of content you want to find.

See Search for content by using filters, page 113 and Select search filters, page 115.

Search results — Content that matches your search criteria is listed in the **Results** area of the search page. Results are displayed as they arrive; you can modify the display to order them by score. The score is only indicated when using a search expression. The results that match the search expression better have three black bullets, then two, one or zero black bullets.

In the **Results** area, you can perform the same actions on CenterStage items that you can in any content area, except for moving or copying items into the **Results** area. Items that do not pertain to CenterStage spaces allow only a restricted list of possible actions. You can import the results that correspond to non-space content as described in Import results into CenterStage, page 118. Some site items that are not available in CenterStage are dimmed.

With xPlore, you can sort the results by column, but only the first 150 results from the entire site (that is, not including results from the extra sources) are sorted.

When you point to the icon of an item, the preview panel appears. Information in the preview panel helps you decide which items in search results are relevant to your needs.

The preview panel allows you to view a quick snapshot of an item without navigating away from your search results. It is not available on results from extra sources.

You can perform actions on an item such as:

- Viewing the file itself – **Open File**
- Viewing the file page – **Preview and Comment**
- Editing the file – **Edit**

Search for global content

You can search globally for content in a site by specifying a search expression only, filtered search only, or a combination of both.

To search globally for content:

1. Type an expression in the search box in the top CenterStage toolbar. The syntax for search expressions is described in Search expression syntax, page 116.

   The Search fly-out panel is displayed, which allows you to specify search criteria.

2. In the Search fly-out panel, select the scope of the search from the following options:
   - If you select **Search in CenterStage**, you can select one of the following scopes:
     - **My spaces** (the default scope).
     - **My favorite spaces** (if any). The search does not return results if no favorites spaces are defined or fails if you have defined more than 70 favorite spaces.
     - **Entire site**. All content in the site (repository) is searched either in CenterStage or out of CenterStage. In this way, you can search cabinets other than the CenterStage cabinet.
   - If external sources have been configured, you can also select **Search in my extra sources**.

     To know which sources will be used for the search, point to the icon : the list of selected extra sources is displayed.

     To modify the list of sources used for the search, refer to Set my extra sources, page 112.

     By default, 50 results are returned for each selected extra source. This limit can be modified by the administrator.

By default, all types of items are automatically searched: items created in CenterStage such as wikis, blogs, discussions, and data tables, but also files such as document, audio, video, or graphic files, and folders.

3. Click to start the search.

   CenterStage searches for items that match your search term, within the scope you specified, either in the item content or in the item metadata. A search page opens in a separate tab, labeled with your search term.

   The search page has another search box at the top, search filters in the middle, and the **Results** area at the bottom.

4. On the tabbed search page, you can:

   - Modify the search expression in the page search box. In this case, the tab label changes to the new search term.
   - Search with filters as described in Search for content by using filters, page 113.
   - Work with items in the **Results** area.

   Actions change, depending on whether the results are items from CenterStage or outside of CenterStage. If you simultaneously select items from CenterStage as well as items located outside of CenterStage, only actions available for both types of results are displayed. In a multi-selection, make sure that you select only one type of results to get all possible actions.

Related topics

- Chapter 8, Search for Content
- Search within a space, page 113

Set my extra sources

You can select which sources you want to include in your searches and define the credentials to use for the connection to these sources.

To set extra sources:

1. Do one of the following:

   - In the Search fly-out panel, select **Search in my extra sources**, then click **Edit**. The **Preferences** dialog box appears and displays the **Search** tab.
   - To open preferences, select **My Preferences** from the *<UserName>* menu in the top CenterStage toolbar.

2. Configure each source as described in Set personal preferences, page 43.

Depending on the configuration set by the administrator, some sources can be accessed with a corporate account. When you use a corporate account, you get only items that everyone can access. To get all the items you have rights to access, specify your own login name and password.

Search within a space

You can search for content in a space by specifying a search expression, using filtered search only, or using a combination of both.

To search within a space:

1. Open the space, as described in View a space, page 49.
2. In the view panel of a space tab, click .

   The page switches to **Search and filter** view. In **Search** view, the page has a search field at the top, search filters in the middle, and the **Results** area at the bottom that displays the most recent items in the space.
3. Do one of the following:
   - Type a search expression in the search field as described in Search expression syntax, page 116, and then click .

     CenterStage performs a full-text search in the space for items matching your search expression, and lists them in the **Results** area.
   - To navigate in the space using the search filters, see Search for content by using filters, page 113.

Related topics

- Chapter 8, Search for Content
- Search for global content, page 111

Search for content by using filters

Filters can be used to narrow a full-text search that returned many results. They can also be used to navigate in a space.

To use filters to search for content:

1. Perform a global search as described in *Search for global content*, or navigate in a space by using the search page of a space as described in *Search within a space*.
2. In the filter area, select filter values that describe the content you want to find.

   The result set refreshes after each selection. The selected values move to the top of the filter.
   - xPlore displays only those filter values with matching results; filter values with no matching results are visible only when searching extra sources to retrieve more results.
   - FAST displays only those filter values with matching results; to display filter values with no matching results, click **More** to open the full view, as described in the next step.

   Most filters sort values in order of decreasing frequency. The **Changed** and **Topic** filters, however, sort values in chronological and ranking order, respectively.

3. To see more values for one filter, click **More** to open the full view of all filter values.
   - xPlore displays the **More** link only when more than eight values are available for a filter. **More** view displays all filter values with matching results, sorted in alphanumeric order.
   - FAST displays all filter values, including values with no matching results, sorted in alphanumeric order.

   You can:
   - Navigate through the pages to find a value.
   - Sort the values in alphanumerical order, either ascending or descending. Or, you can sort by frequency. The frequency order does not apply to the **Topic** filter.
   - For the filters **Location**, **Format**, and **Place in text**, you can group values by type.
     — Grouping locations brings together items in favorite spaces, items from extra sources, and other items in the Documentum repository (for items that are in the site but out of CenterStage).
     — Grouping formats brings together CenterStage objects such as wikis or blogs and files, according to their format.
     — Grouping place names found in the text brings together the city names with their respective countries. The name of the country appears first, followed by the name of all the cities found for this country.
   - Select any number of values. Selected values are listed in the header of the More view. The result set is refreshed after each selection.
   - To close the **More** view and display all filters, click **Hide** or click on another filter name.
4. To clear selections, do one of the following:
   - To deselect one value, click it.
   - To clear selections for a particular filter, click **Reset** in the filter column, or **Reset this filter** in the **More** view.
   - To clear all selections for all filters, click **Reset All Filters**.

As you select or clear filter values, CenterStage searches for content that matches your selections, and displays the matching content in the **Results** area. The more filter values you select, the more precise your search criteria.

Each time you select a value in a different filter, the search is rerun to retrieve more results, if any.

When you select several values in one filter, the results match any of those values; we can say it is an “OR” constraint between values of a filter. This might be obvious when you select **JPEG** and **Powerpoint** format values, for example. However, if you select two values in the **Topic** filter, items are returned as long as their topics match at least one of the values. Their topics do not have to match all the values.

If you select values from various filters, items are returned if they match at least one of the values for each filter; we can say it is an “AND” constraint between filters. They do not have to match all the values of each filter.

Most filters are based on the site properties of the results. These properties can be automatically set by the site, such as the changed date, or set manually by the users. The **Topic** filter is based on the following properties: name, title, and subject. For this reason, the **Topic** filter is more relevant when these properties are filled in consistently. With the xPlore index server, the **Topic** filter is displayed with no count because it is not computed on the entire result set but on the first 50 results.

The filters Place in text, People in text, and Organization in text are only available for CenterStage items and display information found in the content or file properties of the items. The items are analyzed in the background, and only information most relevant to places, people, or organizations (such as companies or institutions) is kept and displayed in the filters. For example, if a document contains the phrase "123company appoints John Smith as executive vice president", the company name "123company" should appear in the Organization in text filter, and the name "John Smith" should appear in the People in text filter.

Limitations when searching extra sources

If you run a search on extra sources by selecting filter values but not by typing a search expression, a source is included in the search only if one of the selected filters is applicable for this source. For example, if you search content by selecting a value in the Changed filter and a source that does not contain date information, the source is not queried.

With xPlore, when searching extra sources, only the 150 most relevant results are returned for the entire site and 50 results for each extra source (this default limit is given for information, it can be configured by the administrator). In this case, filter values that have no matching results are displayed so that you can make a more precise search and retrieve more results. Conversely, since only part of all possible results from the extra sources are returned, the counts for filter values are hidden.

In some cases, searching extra sources may result in complex searches and you will be asked to simplify the search by selecting less filter values. For example, when searching extra sources, you cannot do the following:

- You cannot select several values in the filters Changed and Size.
- You cannot select values from two different filters if these filters are: Place, People, and Company.
- You cannot select CenterStage items in the Format filter.

Select search filters

To select search filters:

1. Perform a global search as described in Search for global content, page 111 or navigate in a space by using the search page of a space as described in Search within a space, page 113.
2. In the filter area, click **Choose Filters**.
3. Select the filters to display and clear the filters to hide. You must have at least one filter selected.
4. Click outside the menu to validate the selection and close the menu.

The selection of search filters is saved; you can have a different selection of filters for each space, and also a selection of filters when performing a global search.

Search expression syntax

To search for text (including titles and comments), you enter a search expression. This type of search is called a full-text search. You can refine your search criteria by using special characters and/or logical Boolean operators. Full-text searches are case-insensitive.

When you use a search expression, you find items with variations of the words you type, based on the root of the word. For example, if you search for **`mouse`**, you may find items that contain also *mice*.

The following table describes the Boolean operators allowed in a search expression.

Operator	Finds	Example
AND	Items that contain all the specified terms	**`Poetry AND Greece`** finds items that contain both words.
OR	Items that contain at least one of the specified terms	**`Poetry OR Greece`** finds items containing either or both words.
NOT	Items that contain the first term or items not containing the second	**`Poetry NOT Greece`** finds items that contain the word *Poetry* but not *Greece*, as well as documents that do not contain the word *Greece*.
When no operator is specified	• With FAST, items that contain one or all of the terms • With xPlore, items that contain all the terms	(FAST) **`Poetry Greece`** finds items that contain either or both words. Items that contain both words are ranked as having the highest relevance, followed by items with one term or the other. (xPlore) **`Poetry Greece`** finds items that contain both words.

Note:

- Logical operators are case-insensitive. For example, **`And`** , **`or`** , and **`Not`** are all valid ways to specify operators.
- Logical operators are the same in all languages (not localized).
- You can string together multiple terms with the AND and OR operators. The AND operator has precedence over the OR operator.
- You can use the NOT operator after the AND or OR operator, separated by a space. (ANDNOT is not an operator.)
- While you may use the NOT operator in front of a term to search for items that do not contain the specified term, use this syntax cautiously since it can generate a large number of results. For example, **`NOT B`** locates items that do not contain the term *B*.

The following table describes the use of special characters in a search expression.

Characters	Description
double quotation marks: " "	To search for an exact phrase or word, enclose it in double quotation marks. For example, typing **`International Space Station`**, you might find an item that contains the sentence: *Space exploration reaches beyond international boundaries with the station in place.* To find items containing the exact phrase in text, enter **`"International Space Station"`**. You cannot search for a double-quotation mark because it is a special character. Quotation marks cannot be used to match the exact case of a word. If you do not use quotation marks, you find items with variations of the words you type, based on the root of the word. For example, if you search for **`mouse`**, you may find items that also contain *mice*.
parentheses: ( )	To override the order of search operations and specify that you want certain terms processed together, use parentheses. For example, if you type **`knowledge and management or discovery`**, the search locates items either with both *knowledge* and *management*, or with *discovery* only. However, if you specify **`knowledge and ( management or discovery )`**, the search locates items with *knowledge* and either *management* or *discovery*. **Note:** Insert a space at the beginning and the end of any search string enclosed by parentheses; for example **`( A OR B )`**.
asterisk: *	• With FAST, use the * operator to search for a word with zero or more unknown characters. For example, the search term **`c*e`** can find words like *cue*, *cute*, *cause*, and *commensurate*. • With xPlore, the * operator works only on whole words, not parts of words. For example, a query for **`computer*`** matches *computer store* or *computer parts* but not *computers*. By default, xPlore does not support search for word fragments because search for whole words is much faster. To change this default behavior to work like FAST, however, the xPlore administrator can turn on the option to search for word fragments.

Note:

- The operators AND, OR, and NOT are reserved words. To search for items containing one of these words, use quotation marks. For example, if you search for **`"hardware and software"`**, the search returns items containing that exact string of three words.
- You cannot apply the NOT operator before a parenthesis. For example, the search expression **`A NOT ( B OR C )`** is invalid. Instead, try **`A NOT B NOT C`**.
- When you use wildcards in a search expression, results depend on the index server CenterStage uses.
  - FAST finds word fragments, but stemming is disabled. For example, if you search for **`run*`**, you find *running*, but not *ran*.
  - xPlore finds whole words, and stemming is activated. For example, you find whole words and variations of the word (such as *ran* for **`run*`**). By default, xPlore does not support search for word fragments because it is faster to search for whole words. To change the default so that xPlore works like the FAST index server, however, the xPlore administrator can turn on the option to search for word fragments.
  - xPlore can be configured in "FAST mode" so that it works like FAST. That is, you can find word fragments and stemming is disabled. For example, a search on **`run*`** can return hits on *running*, but not *ran*. The *EMC Documentum xPlore Administration Guide* contains more information about this option.
- Some special characters are treated as word boundaries, such as @ in an email address. For example, a search for **`Karen@emc.com`** will find *Karen* and *emc.com*. To find the specific address, enclose it in quotes, like this: **`"Karen@emc.com"`**

Related topics

- Chapter 8, Search for Content
- Search for global content, page 111
- Search within a space, page 113

Import results into CenterStage

When searching the entire site or extra sources, you can find content outside of CenterStage spaces and import it to one of your spaces.

To import results:

1. Perform a search as described in Search for global content, page 111.
2. In the **Results** area, select one or more results.
3. Right-click and select **Copy**.
4. Navigate to the location where you want to import the results.
5. Right-click and select **Paste**.

   You can also import results by dragging and dropping them as described in Drag and drop items, page 92.

When you import a file, you become the file owner and file creator. The file import date is the file creation date. CenterStage keeps the format of the original file, based on the MIME type of the file.

If the file includes links to other files, such as graphic files in HTML pages, these files are not imported with the HTML file and must be imported separately.

Some properties are automatically populated, depending on the information available from the source:

- Title: body property
- Subject: abstract property
- Keywords: external site and collection properties

Related topics

- Drag and drop items, page 92
- Chapter 5, Add Content

Stop a search

To stop a search:

1. Perform a global search as described in Search for global content, page 111 or navigate in a space by using the search page of a space as described in Search within a space, page 113.
2. In the search area, click .

   The search stops; the results already available and the corresponding filter values are displayed.

Understand why search fails

In some cases, the search fails and an error message appears above the search area. The following table describes possible causes and solutions.

Error messages	Possible causes	Possible solutions
Authentication failed for: <*sources*>*.	The credentials you entered in your preferences are not valid.	Update the credentials as described in Set my extra sources, page 112.
Search syntax is not valid.	You are not using the operators or the special characters as it is recommended.	Make that you follow the guidelines described in Search expression syntax, page 116.
An internal error occurred on: <*sources*>*, contact your administrator.	An administrator must fix an error that occurred.	Contact the administrator and describe the search you wanted to run.
Search is currently not available on: <*sources*>*, try again later.	One of the sources cannot be reached or does not respond in a timely fashion.	The error is temporary so you can try again in a few minutes.

Error messages	Possible causes	Possible solutions
Search is too vague for: <*sources*>*, try to be more specific.	Some of the extra sources require the search to be more specific.	Type a search expression or select a filter value.
Query too complex for: <*sources*>*	The filter selection is too complex when the search includes extra sources.	Simplify the filter selection taking into account the limitations described in Search for content by using filters, page 113.

* <*sources*> stands for the list of sources that return this type of error. To know which sources are failed, point to the sources and a full list appears in a tooltip.

Chapter 9

Tags

This section is organized into the following topics:

About tagging — A tag is a label that all users in the space share. When you tag an item, the tag can be viewed, reused, or removed by other users.

- Tags can be attached to most items in a space: wikis and wiki pages, blogs and blog posts, discussions and discussion topics, data tables and data table entries, folders, or files.
- When you add a tag, a list of **Popular tags** is displayed. This list includes the ten most frequently occurring tags in the space.
- An item can have many tags, but the same tag only once.
- A tag cloud is a visual representation of all tags for the space. The size of the tags in the tag cloud reflects how many documents are tagged with the same tag for the given set of items.
- You can use the tags to find other items that are similarly tagged.
- You can subscribe to a tag, as described in Subscribe to content, page 74.

Note: Tagging is unavailable for repository items.

Permissions for tagging — The rights you need for tagging items are as follows:

- To add or remove an existing tag on an item, you need at least Read plus Comment permission for the item.
- To add a new tag to an item, you need Create permission for the space.

If the tag action is disabled, contact the space coordinator to gain access.

Related topics

- Add a tag, page 122
- Configure a tagged content widget, page 145
- Configure a popular tags widget, page 145

Add a tag

To add a tag:

1. Click **Add a tag** or **Edit tags** in the item footer, and then use one of the following methods:
   - Type the tag in the **Tags** field. To add several tags, separate them with a comma. The following characters are supported: literal characters, including English a-z, A-Z, and all international (Unicode) characters; digits; all currency symbols, including dollar signs ($), pound signs (£), and euro signs (€); spaces, periods (.), underscores (_), hyphens (-), and number signs (#). All other characters are invalid in the **Tags** field.
     — Click **Add** to validate.
   - Click a tag in the list of **popular tags**. The tag appears in the **Add tag** field.
     — Click **Add** to validate.
     — Click the same tag in the list of popular tags a second time to remove it from the field.
   - Double-click a tag in the list of **popular tags**.
2. Click **Close** to hide the **Add tag** dialog box.

Related topics

- Chapter 9, Tags
- Remove a tag, page 122

Remove a tag

You need the appropriate rights to remove a tag on an item. If the tag action is disabled, contact the space coordinator to gain access.

To remove a tag:

1. In the footer area of the item, click **Edit tags**.
2. Click next to the tag.
3. Click **Close** to hide the **Add tag** dialog box.

When you remove a tag from an item, it does not remove the tag from the space unless the tag was attached to this item only.

Related topics

- Chapter 9, Tags
- Add a tag, page 122

View tags for an item

To view tags for an item:

1. Do one of the following:
   - Right-click the item and select **View *Item*** or, for a file, **Preview and Comment** from the shortcut menu.
   - Select the item and click **View *Item*** or, for a file, **Preview and Comment** in the toolbar.
   - Pause the cursor over the item icon and click **View *Item*** or, for a file, **Preview and Comment** in the preview panel.

If no tag is attached to the item, the **Add a tag** action is available in the footer of the item page. If tags have already been added, the **Edit tags** action is available.

Related topics

- Chapter 9, Tags

View tags for a space

The first time you access the **Tag** view, CenterStage displays all the tags of the space in the tag cloud. Select a tag to display the related content. The font size of the tags in the tag cloud reflects how many documents in the space are tagged with the same tag.

To view tags for a space:

1. Open the space, as described in View a space, page 49.
2. To display the **Tag** view, click in the view panel of the space tab.
3. To display the items associated with a tag, select a tag in the tag cloud.

   The content area displays the corresponding items.
4. To deselect a tag, click the tag again.

When you select a second tag, the first tag is automatically deselected. The content pane updates to display the items corresponding to the second tag only.

Related topics

- Chapter 9, Tags
- View tags for an item, page 123

Chapter 10

Pages

This section is organized into the following topics:

About pages — All CenterStage items have pages, including spaces, files, folders, blogs, posts, wikis, discussions, topics, data tables, and data table entries. However you can only create pages in wikis, as described in Add a wiki page, page 157.

You can subscribe to a page, watch a page, tag a page, comment on a page, share a page, print a page, and (for wikis, wiki pages, and data tables) save a page as a content template.

Pages can have attachments, as described in Chapter 16, Attachments.

Depending on the versioning policy for the space, pages can have versions, as described in Chapter 19, Versioning.

Page widgets — Pages are made up of widgets that determine their content and layout. Widgets also provide viewers for rich text, web feeds, folders, images, and so on. If the layout of a page can be changed, you can organize and configure the page widgets comprising its layout. See Chapter 11, Page Widgets.

Page modes — A page can be in either view or edit mode. You can edit pages for spaces, discussions, topics, blogs, posts, wikis, and wiki pages. When you create a wiki page, it is initially in edit mode so you can modify the content. If the layout can be changed, you can modify the layout. See the following topics for more information:

- View an item page, page 126
- Edit an item page, page 127
- Rich text editing, page 28

Page properties — Pages have properties that determine their permissions, and whether you can change the page layout (for example, add, remove, or move widgets). See View or edit item properties, page 102 and View or edit item permissions, page 105.

Home page header — The header area of an item home page can include the following elements:

- The name of the page (read-only)
- When it was created (read-only) and by whom (an e-mail link)

- When it was last changed (read-only) and by whom (an e-mail link)
- If it is locked for editing, when (read-only) and by whom (an e-mail link)
- Version information, if available (read-only)
- A link to the **History** page

Page footer — The footer area of an item page includes the following elements:

- The **Tags** area
- For a wiki, links to **Attachments**, **History**, **Home Page**, and **All Pages** views
- For a blog, wiki, or discussion, links to **Attachments**, **History**, and **Home Page** views
- For a data table, links to **Attachments** and **Home Page** views

Related topics

- Subscribe to content, page 74
- Watch content, page 74
- Chapter 9, Tags
- Comment on content, page 37
- Share content, page 41
- Print a page, page 128
- Chapter 20, Templates

View an item page

All items in CenterStage have pages to which you can navigate in order to view or perform actions on the item. You view repository items in CenterStage using the same procedures as for viewing items in a space. The following topics describe how to open item pages:

Item page	Help topic
Space	View a space, page 49
Repository	View a repository, page 62
Folder*	View a folder, page 69
File*	View a file page, page 71
Discussion	View a discussion, page 173
Discussion topic	View a discussion topic, page 175
Blog	View a blog, page 163
Blog post	View a blog post, page 165
Wiki	View a wiki, page 153
Wiki page	View a wiki page, page 156

Item page	Help topic
Data table*	View a data table, page 183
Data table entry*	View a data table entry, page 205

*These items include repository items of the same type.

Related topics

- Chapter 10, Pages
- View or edit wiki page properties, page 160
- Edit an item page, page 127
- Print a page, page 128
- Chapter 16, Attachments

Edit an item page

To edit a page (an item home page, wiki page, discussion topic, or blog post), the following conditions must be true:

- You have Edit permission for the page.
- You can change layout (if the layout can be changed; see Content template properties, page 245), or there is at least one rich text widget on the page.
- No other member has the page locked. Only space coordinators can unlock a page locked by another member.

  Note: An item you have locked has a key symbol next to the icon; an item locked by another member has a padlock symbol .

To edit a page:

1. Switch to page editing mode by doing one of the following:
   - Open the item page, as described in View an item page, page 126, and then select **Edit *Item*** from the ***Item* Actions** menu.
   - Select the item, and then click **Edit *Item*** in the toolbar. (This choice is unavailable for space home pages.)
   - Right-click the item and select **Edit *Item***. (This choice is unavailable for space home pages.)
   - Click **Edit** in the preview panel. (This choice is unavailable for space home pages.)

   While the item page is in edit mode, it is locked so that others cannot edit it. A key icon appears next to the item icon in **Content** view.
2. Edit the page.
   - You can edit the page title.
   - If the page layout can be changed, you can add, move, configure, or delete existing widgets.
   - You can edit rich text, even if the page layout cannot be changed.

- You can edit tags.
- Depending on the item version settings, you can modify version information. You can always add or edit version notes, however.

In edit mode, you can use widgets just as you can use them in view mode, for example, add a file to a folder widget, or sort a folder widget.

3. To save a draft of the page for editing later, click **Save Draft**.

   CenterStage also saves page drafts automatically as you work.

4. When you are finished editing, click **Save**.

   If you leave the page before you finish editing, CenterStage automatically saves a draft of the page. Your editing lock remains on the page until you save the page.

Whether the page is versioned depends on the versioning policy for the page.

Related topics

- Chapter 10, Pages
- Chapter 11, Page Widgets
- Organize widgets on a page, page 138
- Configure widgets, page 139
- Chapter 9, Tags
- Chapter 19, Versioning

Print a page

Members can print CenterStage pages using a **Print** command, available from the ***Item* Actions** menu for the following items:

- Space home pages
- Wikis
- Pages
- Blogs
- Posts
- Discussions
- Topics
- Data tables
- Data table entries
- Files
- Folders

Other types of pages do not have a CenterStage **Print** command, but can still be printed using the **Print** function for your browser.

To print a page:

1. Select **Print** from the ***Item* Actions** menu.

   The **Print Preview** window for your browser opens and displays the content of the page to print, as follows:

   - The following elements of the CenterStage page are hidden:
     — Top CenterStage toolbar

     — Page toolbar (if any)

     — View panel of a space or repository tab

     — Navigation tree of a space or repository in **Content** view

     — Controls that have no printed counterpart, such as command buttons or links in the footer for displaying different page views like **History** and **Attachments**.

   - The following elements of the CenterStage page are visible:
     — Breadcrumbs

     — Page name

     — Metadata such as owner and time of last change

     — Content

     — Tags

   - Areas that can be collapsed on the CenterStage page, such as a Group Box widget, are rendered for print as they appear on the page. The exception is the **Comments** area, which is hidden or visible, depending on whether **Include comments** is selected, as described in the next step in this procedure.

   Note: To modify how the page is rendered for print, you can try resizing the CenterStage window for better results. Or, you can adjust the Printer or Page Setup settings for your browser. Display printing tips in the top panel of the print window to show browser-specific information about these settings.

2. To include in the printed page all comments on the CenterStage page, select **Include comments** in the top panel of the print window. If the page has no comments, for example, on a blog or a discussion home page, the **Include comments** checkbox is unavailable.

3. Click **Print** in the control area of the print window to display the **Print** dialog box for your browser.

Related topics

- Chapter 10, Pages

Chapter 11

Page Widgets

This section is organized into the following topics:

Main topics	Subtopics
	• Configure a popular tags widget, page 145 • Configure a tagged content widget, page 145 • Configure a feed widget, page 146 • Configure a recent activity widget, page 147 • Configure a recent spaces widget, page 148

About page widgets — Page widgets are components that are embedded in pages. Widgets enable you to view and interact with items inside a space as well as with external content. Widgets provide the layout and content of a page in a wiki, blog, or discussion.

Related topics

- Chapter 10, Pages
- Chapter 12, Wikis
- Chapter 13, Blogs
- Chapter 14, Discussions

Page widget types

Types of page widget are as follows:

Type	Widget	Description	Help topics
Editor	Rich text	Text, hyperlinks, images, and tables	• Rich text widget, page 134 • Rich text editing, page 28
Layout	Column box	Parallel columns	• Column box widget, page 134 • Configure a column box widget, page 140
	Group box	Collapsible region	• Group box widget, page 135 • Configure a group box widget, page 140

Type	Widget	Description	Help topics
Content viewer	Contents	Child items of a folder or space	• Contents widget, page 135 • Configure a contents widget, page 141
	Image viewer	Image or gallery of images in a folder	• Image viewer widget, page 135 • Configure an image viewer widget, page 142
	Document viewer	Documents for PDF, PowerPoint, Word	• Document viewer widget, page 136 • Configure a document viewer widget, page 143
	Popular tags	Popular tags in a given context	• Popular tags widget, page 136 • Configure a popular tags widget, page 145
	Tagged content	Content that is tagged with a specific tag	• Tagged content widget, page 136 • Configure a tagged content widget, page 145
	Feed	Feed for updated content from a CenterStage item or the Internet	• Feed widget, page 137 • Configure a feed widget, page 146
Recent activity viewer	Recent activity	Recently added or modified items in the current wiki, blog, discussion, data table, or space	• Recent activity widget, page 137 • Configure a recent activity widget, page 147
	Recent pages	Recently added or modified wiki	Same as Recent activity
	Recent posts	Recently added or modified blog posts	Same as Recent activity

Type	Widget	Description	Help topics
	Recent topics	Recently added or modified discussion topics	Same as Recent activity
	Recent spaces	Recently added spaces	• Recent spaces widget, page 138 • Configure a recent spaces widget, page 148

Related topics

- Chapter 11, Page Widgets
- Organize widgets on a page, page 138
- Configure widgets, page 139

Rich text widget

The rich text widget displays rich text when a page is in edit mode and a rich-text widget has focus.

Related topics

- Chapter 11, Page Widgets
- Rich text editing, page 28

Column box widget

The following actions can be performed with a column box widget to customize the page layout:

- Insert other widgets, such as a rich text editor widget, to incorporate content in the page.
- Drag-and-drop the column spacer bars to resize the columns.
- Right-click and select **Add a column after this one** to add a column.
- Right-click and select **Delete this column** to remove a column.

Related topics

- Chapter 11, Page Widgets
- Configure a column box widget, page 140

Group box widget

The following actions can be performed with a group box widget to customize the page layout:

- Insert other widgets, such as a rich text editor widget, to incorporate some content in the page.
- Expand or collapse the box.

Related topics

- Chapter 11, Page Widgets
- Configure a group box widget, page 140

Contents widget

The contents widget exposes the children of a source item (folder, space, or cabinet). It provides the same actions as the **Contents** area on a folder page or in **Content** view of a space or repository, including drag-and-drop and the **New** menu.

The actions that are available for a contents widget depend on the type of source item, as follows:

- Space: Same actions as in **Content** view of a space, including drag-and-drop and the **New** menu.
- Folder, cabinet, or repository folder: Same actions as on a folder page, including drag-and-drop and the **New** menu.

Related topics

- Chapter 11, Page Widgets
- Configure a contents widget, page 141

Image viewer widget

The image viewer widget shows an existing image or a gallery of all images in a folder. You can select a CenterStage image file or folder, or import a new image file. To switch an image viewer widget to full-screen mode, click in the content area. The content inside an image viewer is rendered when a CenterStage page is printed.

Note: CenterStage provides inline viewers that display an image with a thumbnail. Documentum Thumbnail Generator (TG) creates single-page thumbnails (300 x 300 pixels in size) for images, PDF files, and Office documents. If you install Documentum Media Transformation Services (MTS) or Documentum Advanced Document Transformation Services (ADTS), CenterStage can provide full-screen, multi-page document, and image viewing capabilities in addition to thumbnails.

Related topics

- Chapter 11, Page Widgets
- Configure an image viewer widget, page 142
- Print a page, page 128

Document viewer widget

The document viewer widget shows the content of an existing file that you select. To switch a document viewer widget to full-screen mode, click  in the content area. The content inside a document viewer is rendered when a CenterStage page is printed.

Note: CenterStage provides inline viewers that display the first page of a file with a thumbnail. Documentum Thumbnail Generator (TG) creates single-page thumbnails (300 x 300 pixels in size) for images, PDF files, and Office documents. If you install Documentum Media Transformation Services (MTS) or Documentum Advanced Document Transformation Services (ADTS), CenterStage can provide full-screen, multi-page document, and image viewing capabilities in addition to thumbnails. For more information, see the document *Content Transformation Services for CenterStage*.

Related topics

- Chapter 11, Page Widgets
- Configure a document viewer widget, page 143
- Print a page, page 128

Popular tags widget

The Popular tags widget is a tag cloud for a space, a wiki, a blog, or a discussion. The tag cloud is a visual representation of all tags for a given context. For example, if placed on a space home page, the popular tags widget shows the tags for the whole space; if placed in a wiki, the popular tags widget shows all the tags of the wiki, and so on.

Click a tag in the widget to display the **Tag** view for the current space.

Follow the steps described in View tags for a space, page 123 to find content using tags.

Related topics

- Chapter 11, Page Widgets
- Chapter 9, Tags
- Configure a popular tags widget, page 145

Tagged content widget

The tagged content widget allows you to find items identified by specific tags in the current space. The items created or modified most recently are displayed first.

You can perform the following actions:

- To view an item, click the item. The item is displayed in the same tab.
- To display the e-mail address of the modifier, hover over the name of the modifier.

Related topics

- Chapter 11, Page Widgets
- Chapter 9, Tags
- Configure a tagged content widget, page 145

Feed widget

The Feed widget displays the titles, timestamps, and authors of articles in a web feed.

The widget header provides a source info icon at the far left, as follows:

- Source info icon: a CenterStage icon for a CenterStage feed, or a generic or (if available) custom icon for an external feed.
- Item/article icon: a CenterStage icon for a CenterStage item, or a generic icon for articles in an external feed.

If you position the cursor over the icon, a tooltip appears that displays the feed URL. Click the icon to go to the home page of the feed or, if none, the URL of the feed itself.

Clicking an item in a CenterStage feed leads to that item. Clicking an item in an external feed leads to a new browser window or tab for it.

Related topics

- Chapter 11, Page Widgets
- Configure a feed widget, page 146

Recent activity widget

The recent activity widget shows up to 100 items that have been added, changed, or commented on in a folder, wiki, blog, discussion, data table, or the entire space. In addition to the generic recent activity widget, the types of recent activity widget are as follows:

- Recent files (in space, folder, wiki, blog, discussion, or data table)
- Recent pages (in space or wiki)
- Recent posts (in space or blog)
- Recent topics (in space or discussion)

Tip: To refresh the list of recent items, click in the widget footer. To navigate through multiple pages of items, use the page controls in the widget footer.

Related topics

- Chapter 11, Page Widgets
- Configure a recent activity widget, page 147

Recent spaces widget

The recent spaces widget shows up to 100 spaces that have been added recently.

Related topics

- Chapter 11, Page Widgets
- Configure a recent spaces widget, page 148

Organize widgets on a page

To organize widgets on a page (add, configure, move, and delete), the following conditions must be true:

- You have Edit permission for the page.
- The page layout can be changed.
- No other member has the page locked. Only space coordinators can unlock a page locked by another member.
- You have the page open for editing. See Edit an item page, page 127.

Related topics

- Add a widget, page 138
- Configure widgets, page 139
- Move a widget, page 139
- Delete a widget, page 139

Add a widget

To add a widget to a page, you must have the page open for editing, as described in Edit an item page, page 127.

To add a widget to a page:

1. In the page toolbar, click **Add Widgets to Page**.
2. In the gallery of widgets, either drag a widget and drop it onto the page, or double-click the widget.

   If the widget has non-default configuration options, the configuration dialog box appears. For a widget with default settings in effect when added to a page (such as layout widgets or recent activity widgets), the configuration dialog box does not open automatically.
3. In the page toolbar, click **Save**.

Related topics

- Chapter 11, Page Widgets
- Configure widgets, page 139

Move a widget

To move a widget on a page, you must have the page open for editing, as described in Edit an item page, page 127.

Click-and-drag the header bar of a widget, and drop it in a new location.

Related topics

- Chapter 11, Page Widgets

Delete a widget

To delete a widget from a page, you must have the page open for editing, as described in Edit an item page, page 127.

To delete a widget from a page:

1. Give focus to the widget you want to delete.
2. In the upper-right corner of the widget header bar, click .
3. Confirm the deletion.

Related topics

- Chapter 11, Page Widgets

Configure widgets

To configure settings for widgets on a page, the following conditions must be true:

- You have Edit permission for the page.
- The page layout can be changed.
- No other member has the page locked. Only space coordinators can unlock a page locked by another member.
- You have the page open for editing. See Edit an item page, page 127.

To configure a widget:

1. Give focus by clicking or positioning the cursor over the widget you want to configure.
2. Click in the upper-right corner of the widget header bar.
3. In the **Settings** dialog box, configure the widget as described in one of the following topics:
    - Configure a column box widget, page 140
    - Configure a group box widget, page 140
    - Configure a contents widget, page 141
    - Configure an image viewer widget, page 142

- Configure a document viewer widget, page 143
- Configure a popular tags widget, page 145
- Configure a tagged content widget, page 145
- Configure a feed widget, page 146
- Configure a recent activity widget, page 147
- Configure a recent spaces widget, page 148

Related topics

- Chapter 11, Page Widgets

Configure a column box widget

To configure a column box widget:

1. Complete the **Settings** dialog box for the column box widget as follows:

Field	Description
Number of columns	Number of columns in the widget. The minimum is two columns, the maximum is four.
Title	Name that appears in the header bar for the widget

2. Click **OK**.

Note: If you add or remove a column by modifying the number of columns in the widget settings, the column is added after the last, or the last column is removed. When a column is removed, any widgets in it are moved to the next column. When adding or removing a column, all columns are resized.

Related topics

- Chapter 11, Page Widgets
- Column box widget, page 134
- Configure widgets, page 139

Configure a group box widget

To configure a group box widget:

1. Complete the **Settings** dialog box for the group box widget by typing an optional name in the **Title** field. The **Title** appears in the widget header bar.
2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Group box widget, page 135
- Configure widgets, page 139

Configure a contents widget

To configure a contents widget:

1. Complete the **Settings** dialog box for the contents widget as follows:

Field/Control	Description/Action
Show contents of	To select a source for the contents widget, do the following: 1. Click **Select**. 2. Complete the **Select a folder or space to show** dialog box as follows: 3. On the **Search in** menu, select a range, or scope, within which to search for a source. Choices are as follows: • **Current space** • **Only my favorite spaces** • **My spaces** • **Entire site** • **My recent items** 4. Optionally, in the search field, type a search string to locate a source item with a name that matches the string. Up to 100 items are returned in the list. If you cannot find the source item in the list, try searching for it. 5. To choose a source item in the list, either double-click it, or select it and click **OK**. **Tip:** To refresh the list of items, click in the footer of the dialog box. To navigate through multiple pages of items, use the page controls in the footer.

Field/Control	Description/Action
Number of items	Number of items for the widget to display without paging. The choices are as follows: • **5 at a time** • **10 at a time** • **25 at a time**
Widget title (optional)	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Contents widget, page 135
- Configure widgets, page 139

Configure an image viewer widget

To configure an image viewer widget:

1. Complete the **Image Viewer Widget Settings** dialog box for the image widget as follows:

Field/Control	Description/Action
Show contents of	To select a source for the image viewer widget, or import an image, do the following: 1. Click **Select** to open the **Select an image or folder** dialog box. 2. To search for an image or folder, complete the **Search** tab, as follows: 3. On the **Search in** menu, select a range, or scope, within which to search for an image or folder (gallery of images) to show in the viewer. Choices are as follows: • **Current space** • **Only my favorite spaces**

Field/Control	Description/Action
	• **My spaces** • **My recent items** 4. Optionally, in the search field, type a search string to locate an image or folder with a name that matches the string. 5. To choose an image or folder in the list, either double-click it, or select it and click **OK**. 6. To import an image, complete the **Import Image** tab, as follows: 7. Click **Browse** to select an image. 8. When you return to the **Import Image** dialog box, click **OK** to import the image. 9. Click **OK** in the **Image Viewer Widget Settings** dialog box.
Widget title (optional)	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Image viewer widget, page 135
- Configure widgets, page 139

Configure a document viewer widget

The document viewer widget shows a document that you specify.

To configure a document viewer widget:

1. Complete the **Document Viewer Widget Settings** dialog box for the document widget as follows:

Field/Control	Description/Action
Show document	To select a source for the document viewer widget, or import a document, do the following: 1. Click **Select** to open the **Select a document** dialog box. 2. To search for a document, complete the **Search** tab, as follows: 3. On the **Search in** menu, select a range, or scope, within which to search for a document to show in the viewer. Choices are as follows: • **Current space** • **Only my favorite spaces** • **My spaces** • **My recent items** 4. Optionally, in the search field, type a search string to locate a document with a name that matches the string. 5. To choose document in the list, either double-click it, or select it and click **OK**. 6. To import a document, complete the **Import Document** tab, as follows: 7. Click **Browse** to select a document. 8. When you return to the **Import Document** dialog box, click **OK** to import the document. 9. Click **OK** in the **Document Viewer Widget Settings** dialog box.
Widget title (optional)	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Document viewer widget, page 136
- Configure widgets, page 139

Configure a popular tags widget

To configure a popular tags widget:

1. Complete **Settings** dialog box for the popular tags widget as follows:

Field	Description
Show	Select the number of tags for the widget to display. The choices are as follows: • **5 Tags** • **10 Tags** (default choice) • **25 Tags** • **45 Tags**
Widget title	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Chapter 9, Tags
- Configure widgets, page 139

Configure a tagged content widget

To configure a tagged content widget:

1. Complete **Settings** dialog box for the tagged content widget as follows:

Field	Description
Show items tagged with [all	any] of the following terms:	1. Select the operator between the tags: • **Any of the following tags** (default option): all the items that match any of the tags are displayed. • **All of the following tags**: only items that match all tags are displayed. 2. Type the tags by separating them with commas.

Field	Description
Number of items	• **5 at a time** • **10 at a time** (default choice) • **25 at a time** Number of items for the widget to display at a time. The choices are as follows:
Widget title	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Chapter 9, Tags
- Configure widgets, page 139

Configure a feed widget

To configure a feed widget:

1. Complete the **Settings** dialog box for the feed widget as follows:

Field/Control	Description/Action
Show feed from	Specify the feed source, as follows: • For a source outside of CenterStage, type or paste the URL. The source can be an RSS or Atom feed. RSS feeds can have the extension .rss or .xml. Atom feeds can have the extension .atom or .xml. • For a source within CenterStage, click **Select** to select the source. Complete the **Select a feed** dialog box as follows: 1. On the **Search in** menu, select a range, or scope, within which to search for a feed source. Choices are as follows: • **Current space** • **Only my favorite spaces**

Field/Control	Description/Action
	• My spaces • My recent items 1. Optionally, in the search field, type a search string to locate a source with a name that matches the string. 2. To choose a source in the list, either double-click it, or select it and click **OK**.
Number of items	Number of results for the widget to display. Choices are as follows: • **5 at a time** • **10 at a time** • **25 at a time**
Widget title (optional)	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Feed widget, page 137
- Configure widgets, page 139

Configure a recent activity widget

The recent activity widget shows content that has been added, changed, or commented on within a specified scope (space, folder, wiki, blog, or discussion).

This procedure is the same for the following types of widget:

- Recent files (in space, folder, wiki, blog, discussion, or data table)
- Recent pages (in space or wiki)
- Recent posts (in space or blog)
- Recent topics (in space or discussion)

To configure a recent activity widget:

1. Add a recent activity widget to a page as described in Add a widget, page 138.
2. Click in the upper-right corner of the widget header bar.
3. Complete the **Settings** dialog box for a recent activity widget as follows:

Field/Control	Description/Action
Show recent activity in	Select a source for the recent activity widget as follows: 1. Click **Select**. 2. Complete the **Select an item to watch** dialog box as follows: 3. On the **Search in** menu, select a range, or scope, within which to search for recent activity. Choices are as follows: • **Current space** • **Only my favorite spaces** • **My spaces** • **Entire site** • **My recent items** 4. Optionally, in the search field, type a search string to locate a source with a name that matches the string. 5. To choose a source in the list, either double-click it, or select it and click **OK**.
Number of items	Number of items for the widget to display without paging. Choices are as follows: • **5 at a time** • **10 at a time** (the default) • **25 at a time**
Widget title (optional)	Name that appears in the header bar for the widget

4. Click **OK** to add the widget to the page.

Related topics

- Chapter 11, Page Widgets
- Configure widgets, page 139

Configure a recent spaces widget

To configure a recent spaces widget:

1. Complete the **Settings** dialog box for the recent spaces widget as follows:

Field	Description
Number of items	Number of items for the widget to display without paging. Choices are as follows: • **5 at a time** • **10 at a time** (the default) • **25 at a time**
Widget title (optional)	Name that appears in the header bar for the widget

2. Click **OK**.

Related topics

- Chapter 11, Page Widgets
- Chapter 2, Spaces
- Configure widgets, page 139

Chapter 12

Wikis

This section is organized into the following topics:

About wikis — A wiki is a collection of pages that multiple people can edit and that typically focuses on a particular subject. Like blogs and discussions, you can add a wiki at the top level of a space, within a folder, or as an attachment to a data table or (if the schema allows it) a data table entry. Wikis cannot, however, contain nested folders or other containers such as blogs or data tables. You can subscribe to a wiki, watch a wiki, tag a wiki, comment on a wiki, share a wiki, and save it as a template. See the following topics for more information:

- Subscribe to content, page 74
- Watch content, page 74
- Chapter 9, Tags
- Comment on content, page 37
- Share content, page 41
- Chapter 20, Templates

Wiki pages — Within wikis are wiki pages. In a wiki, you can view, edit, create, copy, move, and delete pages, and view or edit wiki page properties. For or more information, see Chapter 10, Pages.

Page views of a wiki — Wiki page views are as follows:

Page view	Description	Help topic
Wiki home page	The home page view of a wiki shows: • Links to **History** view (in the page header and footer) • Links to **All Pages** view (in the page header and footer) • A link to **Attachments** view (in the footer) • A **Tags** area • A **Comments** area For information about editing the wiki home page, see Edit an item page, page 127.	View a wiki, page 153
History view	Shows the version history of the wiki home page .	View version history of a page or file, page 234
Attachments view	Shows the files attached to the wiki home page.	View attachments to a page, page 213
All Pages view	Shows a list of all pages in the wiki.	View all pages in a wiki, page 155

Organize wikis — You organize wikis and wiki pages as you do other items in the content library: manage properties and permissions, copy, cut, paste (the item or a link to the item), drag-and-drop, delete, or share a wiki.

Related topics

- Copy items, page 81
- Move items, page 87
- Drag and drop items, page 92
- Paste items as links, page 95
- Delete items, page 96
- Share content, page 41
- View or edit item properties, page 102
- View or edit item permissions, page 105

View a wiki

To view a wiki, do one of the following:

Action	Context
• Click the wiki icon or the name of the wiki. • Right-click the wiki and select **View Wiki** from the shortcut menu.	In the navigation tree of a space in **Content** view
• Double-click the wiki icon . • Right-click the wiki and select **View Wiki** from the shortcut menu. • Select the wiki and click **View Wiki** in the page toolbar.	• In the content area of a space in **Content** view • In a folder • In search results • In **Tags** view of a space • In **Attachments** view of a data table, or in the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** widget
• Pause the cursor over the wiki icon , and then click **View** in the preview panel. • Click the name of the wiki.	• In the content area of a space in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** or a **Recent Activity** widget • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Pages**
Click the wiki.	In the **Recent activity** area of a preview panel

Related topics

- Chapter 12, Wikis

Add a wiki

You can add a wiki at the top level of a space, within a folder, as an attachment to a data table or, if the schema allows, to a data table entry. To add a wiki, you must have at least Create permission for the location in which to create it.

To add a wiki:

1. Open **Content** view of a space, as described in Content view of a space, page 50.
2. Do one of the fo
   - In the page toolbar, select **New >** **Wiki**.
   - In the navigation tree, right-click the top node of the space, or in a CenterStage container, and then select **New >** **Wiki**.
   - In the content area, right-click a CenterStage container, and then select **New >** **Wiki**.
   - In **Attachments** view of a data table, select **New >** **Wiki**.
   - In the **Attachments** field (if any) of a data table entry in view mode, select **New >** **Wiki**.
3. Complete the **New Wiki** dialog box as follows:

Field / Control	Action
Wiki name (required)	Type a name that is unique in the space.
Choose a template	Select one of the available templates.

4. Click **Create**.

   The new wiki is created and the wiki home page appears in edit mode.
5. Modify the title and content as needed. If the template used to create the wiki allows layout changes, you can add or remove widgets on the page.
6. Do one of the following:
   - To save the page and continue in edit mode, click **Save Draft**.
   - To save the wiki and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

As creator of the new wiki, you are the owner. You are also the owner of any wiki pages and attachments created from the wiki template.

Wiki permissions

The initial permissions of a new wiki are either a copy of the space permissions (if created at the top-level of the space), or the parent permissions (if created in a folder, or as an attachment to a data table or entry).

Related topics

- Chapter 12, Wikis
- View or edit wiki properties, page 155
- Add a wiki page, page 157
- Chapter 18, Permissions and Roles

View or edit wiki properties

To view or edit wiki properties:

1. Open the **Wiki Properties** dialog box, as described in View or edit item properties, page 102.
2. On the **General** tab, view or edit properties, as follows:

Field	Description
Name	A name for the wiki that is unique in the space
Owner	The member with Content Owner privileges to the wiki. Click to change the owner of the wiki.
Template (read-only)	The name of the template used to create the wiki
Layout type (read-only)	Whether the layout of the wiki home page can be changed

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.
3. On the **Permissions** tab, view or edit permissions, as described in View or edit item permissions, page 105.
4. On the **Version** tab, view or edit version settings, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 12, Wikis

View all pages in a wiki

The **All Pages** view shows all the pages in a wiki.

To display **All Pages** view, do one of the following:

- Select **Show All Pages in this Wiki** action on the **Wiki Actions** or **Page Actions** menus.
- Click the **All Pages in this Wiki** link in the header or footer of the page.
- Right-click the wiki and select **Show All Pages in this Wiki** from the shortcut menu.

In the toolbar of the wiki in **All Pages** view, the **More** menu provides the following actions that you can perform on pages:

Action	Help topic
Share Page	Share content, page 41
Cut **Copy** **Paste**	• Move items, page 87 • Copy items, page 81
Rename **Delete Page**	• Rename an item, page 108 • Delete items, page 96
Select All	
Lifecycle	Chapter 21, Lifecycles
Page Properties	View or edit item properties, page 102

Related topics

- Chapter 12, Wikis
- View a wiki page, page 156
- Add a wiki page, page 157
- Delete a wiki page, page 159
- Chapter 10, Pages
- Edit an item page, page 127

View a wiki page

To view a blog post, do one of the following:

Action	Context
• Click the page icon or the name of the page. • Right-click the page and select **View Page** from the shortcut menu.	In the navigation tree of a space in **Content** view, with the parent wiki expanded

Action	Context
• Double-click the page icon . • Right-click the page and select **View Page** from the shortcut menu. • Select the page and click **View Page** in the page toolbar.	• In **All Pages** view of a wiki • In search results • In **Tag** view of a space
• Pause the cursor over the page icon , and then click **View** in the preview panel. • Click the name of the page	• In **All Pages** view of a wiki • In search results • In **Tag** view of a space • In the following widgets: — **Recent Activity** — **Recent Pages** • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Pages**
Click the page.	In the **Recent Pages** area of the preview panel for a wiki

For information about editing a page, see Edit an item page, page 127.

Related topics

- Chapter 12, Wikis
- View all pages in a wiki, page 155
- Add a wiki page, page 157
- Delete a wiki page, page 159
- Chapter 10, Pages
- Edit an item page, page 127

Add a wiki page

You must have at least Create permission for the wiki in which to add the page.

To add a page to a wiki:

1. Do one of the following:
   - On a wiki home page, click **New Page** in the **Actions** toolbar.
   - Right-click a wiki and select **New Page in this Wiki** from the shortcut menu in the following contexts:
     — In **Content** view of a space, in the **Content** area displaying the root of the content library
     — In the navigation tree
     — In a contents widget
   - In **All Pages** view of a wiki, click **New Page in this Wiki** in the page toolbar.
2. If there are template choices for a page, complete the **Add New Page** dialog box as follows (otherwise you can skip this step):

Field / Control	Description
Page name	Type a name for the new page that is unique among other page names in the same wiki.
Choose a template	Select a template category, and then select a page template from which to create the page.
Create	Click to create the new page.

3. The new page is created in the specified wiki and appears in edit mode. Modify the title and content as needed. If the template used to create the page allows layout changes, you can add or remove widgets on the page.
4. Do one of the following:
   - To save the page and continue in edit mode, click **Save Draft**.
   - To save the page and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

The new page and any attachments initially have the same permissions as the wiki in which it is created.

Related topics

- Chapter 12, Wikis
- View all pages in a wiki, page 155
- View a wiki page, page 156
- Delete a wiki page, page 159
- Chapter 10, Pages
- Edit an item page, page 127

Delete a wiki page

If you are a space coordinator, or if you have Delete rights to the page, you can delete a wiki page.

To delete a wiki page:

1. Do one of the following:

Action	Context
Select **Delete Page** from the **Page Actions** menu.	On the wiki page.
For a single page, do either of the following: • Right-click the page and select **Delete Page.** • Select the page, and then select **Delete Page** from the **More** menu. For multiple items, do either of the following: • Select multiple pages (or items, including pages), right-click, and then select **Delete**. • Select multiple pages, and then select **Delete** from the **More** menu.	• In **All Pages** view of a wiki • In **Search and filter** view of a space, or on a search tab • In **Tag** view of a space

Note: Actions in the context of **Search** and **Tag** views apply to details or thumbnails view only.

2. In the **Delete Page?** dialog box, click **OK** to confirm that you want to delete the selected page, and all of the associated attachments, permanently from the wiki.

Related topics

- Chapter 12, Wikis
- Chapter 10, Pages
- View a wiki page, page 156
- View all pages in a wiki, page 155
- Add a wiki page, page 157

View or edit wiki page properties

To view or edit page properties:

1. Open the page **Properties** dialog box by doing one of the following:
   - Open a wiki page as described in View a wiki page, page 156, and then select **Page Actions** > **Page Properties**.
   - Display **All pages** view of a wiki, as described in View all pages in a wiki, page 155, and then do one of the following:
     — Right-click a page and select **Page Properties** from the shortcut menu.
     — Select a page, and then select **More** > **Page Properties**.
     — Pause the cursor over a page icon, and then click in the preview panel.
2. On the **General** tab, view or edit page properties as follows:

Field	Description
Name	A name for the page that is unique in the wiki
Owner	The member with Content Owner rights to the page. Click to change the owner of the page.
Template (read-only)	The name of the template used to create the page
Layout type (read-only)	Whether the layout of the page can be changed

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.
3. On the **Permissions** tab, view or edit page permissions, as described in View or edit item permissions, page 105.
4. On the **Versions** tab, view or edit versions settings for the page, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 10, Pages

Chapter 13

Blogs

This section is organized into the following topics:

About blogs — A blog is a series of articles (posts), in reverse-chronological order (most recent first) by one or more authors. Like wikis and discussions, you can add a blog at the top level of a space, within a folder, or as an attachment to a data table or (if the schema allows it) a data table entry. Blogs cannot, however, have nested folders or contain other top-level items. You can attach files to a blog, subscribe to a blog, watch a blog, and tag a blog. See the following topics for more information:

- Chapter 16, Attachments
- Subscribe to content, page 74
- Watch content, page 74
- Chapter 9, Tags

Note: Blogs are not created with templates, and you cannot save a blog as a template.

Blog posts — Within blogs are blog posts. Posts typically have a particular subject, or theme. You can view, edit, create, and delete posts, and view or edit post properties.

Blog posts are pages that you can edit like other item pages. For information about editing a post, see Edit an item page, page 127.

Page views of a blog — Blog page views are as follows:

Page view	Description	Help topic
Blog home page	The home page view of a blog shows: • The posts in the blog • A rich text widget, a Popular Tags widget, and an Archives widget • Links to **History** view (in the page header and footer) • A link to **Attachments** view (in the footer) • A **Tags** area Because the layout is fixed, you can edit the rich text, but you cannot add, remove, or delete widgets on the blog home page. For information about editing a blog home page, see Edit an item page, page 127.	View a blog, page 163
History view	Shows the version history of the blog home page	View version history of a page or file, page 234
Attachments view	Shows the files attached to the blog home page	View attachments to a page, page 213

Organize blogs — You organize blogs as you do other items in the content library: manage properties and permissions, copy, cut, paste (the item or a link to the item), drag-and-drop, delete, or share a blog.

Related topics

- Copy items, page 81
- Move items, page 87
- Drag and drop items, page 92
- Paste items as links, page 95
- Delete items, page 96
- Share content, page 41
- View or edit item properties, page 102
- View or edit item permissions, page 105

View a blog

To view a blog, do one of the following:

Action	Context
• Click the blog icon or the name of the blog. • Right-click the blog and select **View Blog** from the shortcut menu.	In the navigation tree of a space in **Content** view
• Double-click the blog icon. • Right-click the blog and select **View Blog** from the shortcut menu. • Select the blog and click **View Blog** in the page toolbar.	• In the **Content** area of a space or repository in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** widget
• Pause the cursor over the blog icon, and then click **View** in the preview panel. • Click the name of the blog.	• In the content area of a space in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** or a **Recent Activity** widget • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Posts**
Click the blog.	In the **Recent activity** area of a preview panel

For information about editing a blog home page, see Edit an item page, page 127.

Related topics

- Chapter 13, Blogs
- Add a blog, page 164
- View or edit blog properties, page 165

Add a blog

You can add a blog at the top level of a space, within a folder, as an attachment to a data table or, if the schema allows, to a data table entry. To add a blog, you must have at least Create permission for the location in which to create it.

To add a blog:

1. Open **Content** view of a space, as described in Content view of a space, page 50.
2. Do one of the following:
   - In the page toolbar at the top level of a space, or on a folder page, select **New >** **Blog**.
   - In the navigation tree, right-click the top node of the space, or in a CenterStage container, and then select **New >** **Blog**.
   - In the content area, right-click a CenterStage container, and then select **New >** **Blog**.
   - In **Attachments** view of a data table, select **New >** **Blog**.
   - In the **Attachments** field (if any) of a data table entry in view mode, select **New >** **Blog**.
3. The new blog is created and the home page appears in edit mode. The layout of the blog home page is fixed, but you can modify the title and welcome message as needed.
4. Do one of the following:
   - To save the blog and continue in edit mode, click **Save Draft**.
   - To save the blog and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

As creator of the new blog, you are the default owner.

Blog permissions

Like wikis, discussions, and data tables, blogs have their own permissions. Unlike those items, however, initial blog permissions are not a copy of the space or parent permissions. Because blogs typically have a single author (the owner/creator), the owner of a new blog is the only member of the space with both Edit and Delete rights to the blog.

Related topics

- Chapter 13, Blogs
- View a blog, page 163
- View or edit blog properties, page 165

- Add a blog post, page 167
- Chapter 18, Permissions and Roles

View or edit blog properties

To view or edit blog properties:

1. Open the **Blog Properties** dialog box, as described in View or edit item properties, page 102.
2. On the **General** tab, view or edit blog properties as follows:

Field	Description
Name	A name for the blog that is unique in the space
Owner	The member with Content Owner privileges to the blog. Click to change the owner of the blog.
Template (read-only)	The name of the template used to create the blog

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.

3. On the **Permissions** tab, view or edit blog permissions, as described in View or edit item permissions, page 105.
4. On the **Version** tab, view or edit version settings for the blog, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 13, Blogs
- View a blog, page 163
- Add a blog, page 164

View a blog post

To view a blog post, do one of the following:

Action	Context
• Click the post icon or the name of the post. • Right-click the post and select **View Post** from the shortcut menu.	In the navigation tree of a space in **Content** view, with the parent blog expanded

Action	Context
Click the name of the post.	• On the home page of a blog, as described in View a blog, page 163. • In search results • In **Tag** view of a space • In the following widgets: — **Contents** — **Recent Activity** — **Recent Posts** — **Tagged Content** — **Popular Tags** • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Posts**
• Double-click the post icon . • Right-click the post and select **View Post** from the shortcut menu. • Select the post and click **View Post** in the page toolbar.	• In search results • In **Tag** view of a space
• Pause the cursor over the post icon , and then click **View** in the preview panel.	• In search results • In **Tag** view of a space

Action	Context
• Click the name of the post.	• In the following widgets: — **Contents** — **Recent Activity** — **Recent Posts** • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Posts**
Click the post.	In the **Recent Posts** area of the preview panel for a blog

For information about editing a blog post page, see Edit an item page, page 127.

Related topics

- Chapter 13, Blogs
- Add a blog post, page 167
- View or edit post properties, page 168
- Edit a post, page 169
- Delete a blog post, page 169

Add a blog post

You must have at least Create permission for the blog in which to add the post.

To add a post to a blog:

1. Do one of the following:
   - On a blog home page, click **New Post** in the **Actions** toolbar.
   - Right-click a blog and select **New Post in this Blog** from the shortcut menu in the following contexts:
     — In **Content** view of a space, in the **Content** area displaying the root of the content library
     — In the navigation tree
     — In a contents widget
2. The new post is created in the specified blog and appears in edit mode. Modify the title and content as needed.

3. Do one of the following:
   - To save the post and continue in edit mode, click **Save Draft**.
   - To save the post and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

The new post initially has the same permissions as the blog in which it is created.

Related topics

- Chapter 13, Blogs
- View a blog post, page 165
- View or edit post properties, page 168
- Edit a post, page 169
- Delete a blog post, page 169

View or edit post properties

To view or edit post properties:

1. Open post **Properties**, as described in View or edit item properties, page 102.
2. On the **General** tab, view or edit post properties as follows:

Field	Description
Name	A name for the post that is unique in the space
Owner	The member with Content Owner privileges to the post. Click to change the owner of the post.
Template (read-only)	The name of the template used to create the post

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.

3. On the **Permissions** tab, view or edit permissions, as described in View or edit item permissions, page 105.
4. On the **Version** tab, view or edit version settings, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 13, Blogs
- View a blog post, page 165
- Add a blog post, page 167
- Edit a post, page 169
- Delete a blog post, page 169

Edit a post

To edit a post, do one of the following:

- View a blog as described in View a blog, page 163, and then click **Edit** below the post to edit it.
- View a post as described in View a blog post, page 165, and then click **Post Actions > Edit Post**.

Modify the content of the post, as appropriate. See Rich text editing, page 28.

Related topics

- Chapter 13, Blogs
- View a blog post, page 165
- Add a blog post, page 167
- View or edit post properties, page 168
- Delete a blog post, page 169

Delete a blog post

If you are a space coordinator, or if you have Delete rights to the blog, you can delete a blog post.

To delete a blog post:

1. Do one of the following:

Action	Context
Click **Delete** below the title of the post.	On the blog home page
Select **Delete Post** from the **Post Actions** menu.	On the post page
For a single post, do either of the following: • Right-click the post and select **Delete Post** from the shortcut menu. • Select the post, and then select **Delete Post** from the **More** menu. For multiple items, do either of the following: • Select multiple posts (or items, including posts), right-click, and then select **Delete**. • Select multiple posts, and then select **Delete** from the **More** menu.	• In **Search** view of a space, or on a search tab • In **Tag** view of a space

Note: Actions in the context of **Search** and **Tag** views apply to details or thumbnails view only.

2. In the **Delete Blog Post?** or **Delete Items?** dialog box, click **OK** to confirm that you want to delete the selected post or posts, and all of the associated attachments, permanently.

Related topics

- Chapter 13, Blogs
- View a blog post, page 165
- Add a blog post, page 167
- View or edit post properties, page 168
- Edit a post, page 169

Chapter 14

Discussions

This section is organized into the following topics:

Discussions	Discussion topics
• View a discussion, page 173	• View a discussion topic, page 175
• Add a discussion, page 174	• Add a discussion topic, page 176
• View or edit discussion properties, page 175	• View or edit topic properties, page 177
	• Add a reply to a discussion topic, page 178
	• Delete a discussion topic, page 178

About discussions — A discussion is an open-ended conversation made up of topics. Like blogs and wikis, you can add a discussion at the top level of a space, within a folder, or as an attachment to a data table or (if the schema allows it) a data table entry. Discussions cannot, however, contain nested folders or other containers such as as blogs or data tables. You can subscribe to a discussion, watch a discussion, tag a discussion, and share a discussion. See the following topics for more information:

- Subscribe to content, page 74
- Watch content, page 74
- Chapter 9, Tags
- Share content, page 41

Discussions are not created with templates, and you cannot save a discussion as a template.

Discussion topics — Within discussions are discussion topics. One or more topics can be created in a single discussion, and discussion topics have comments in the form of replies. See the following topics for more information:

- View a discussion topic, page 175
- Add a discussion topic, page 176
- View or edit topic properties, page 177

Page views of a discussion — Discussion page views are as follows:

Page view	Description	Help topic
Discussion home page	The home page view of a discussion shows: • The topics in the discussion • A rich text widget, and a Popular Tags widget • Links to **History** view (in the page header and footer) • A link to **Attachments** view (in the footer) • A **Tags** area Because the layout of the discussion home page is fixed, you can edit the rich text, but you cannot add, remove, or delete widgets on it. For information about editing a discussion home page, see Edit an item page, page 127.	View a discussion, page 173
History view	Shows the version history of the discussion home page.	View version history of a page or file, page 234
Attachments view	Shows the files attached to the discussion home page.	View attachments to a page, page 213

Organize discussions — You organize discussions as you do other items in the content library: manage properties and permissions, copy, cut, paste (the item or a link to the item), drag-and-drop, delete, or share a discussion.

Related topics

- Copy items, page 81
- Move items, page 87
- Drag and drop items, page 92
- Paste items as links, page 95
- Delete items, page 96
- Share content, page 41
- View or edit item properties, page 102
- View or edit item permissions, page 105

View a discussion

To view a discussion, do one of the following:

Action	Context
Click the discussion icon or the name of the discussion.	In the navigation tree of a space in **Content** view
• Double-click the discussion icon . • Right-click the discussion and select **View Discussion** from the shortcut menu. • Select the discussion and click **View Discussion** in the page toolbar.	• In the content area of a space in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table, or in the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** widget
• Pause the cursor over the discussion icon , and then click **View** in the preview panel. • Click the name of the discussion.	• In the content area of a space in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** or a **Recent Activity** widget • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Topics**
Click the discussion.	In the **Recent activity** area of a preview panel

Note: Actions in the context of **Content**, **Search**, **Tag**, and **Attachments** views apply to details or thumbnails view only.

In the toolbar of the discussion home page, the **More** menu provides the following actions that you can perform on topics:

Action	Help topic
Share Topic	Share content, page 41
Rename **Delete Topic**	• Rename an item, page 108 • Delete items, page 96
Select All	
Lifecycle	Chapter 21, Lifecycles
Topic Properties	View or edit item properties, page 102

Related topics

- Chapter 14, Discussions

Add a discussion

You can add a discussion at the top level of a space, within a folder, as an attachment to a data table or, if the schema allows, to a data table entry. To add a discussion, you must have at least Create permission for the location in which to create it.

To add a discussion:

1. Open **Content** view of a space, as described in Content view of a space, page 50.
2. Do one of the following:
   - In the page toolbar at the top level of a space, or in a CenterStage container, select **New** > **Discussion**.
   - In the navigation tree, right-click the top node of the space, or a CenterStage container, and then select **New** > **Discussion**.
   - In the content area, right-click a CenterStage container, and then select **New** > **Discussion**.
   - In **Attachments** view of a data table, select **New** > **Discussion**.
   - In an **Attachments** field widget that has focus in a data table entry in view mode, select **New** > **Discussion**.
3. The new discussion is created in the specified space and the home page appears in edit mode. The layout of the discussion home page is fixed, but you can modify the title and welcome message as needed.
4. Do one of the following:
   - To save the discussion and continue in edit mode, click **Save Draft**.
   - To save the discussion and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

As creator of the new discussion, you are the default owner.

Discussion permissions

The initial permissions of a new discussion are either a copy of the space permissions (if created at the top-level of the space), or the parent permissions (if created in a folder, or as an attachment to a data table or entry).

Related topics

- Chapter 14, Discussions
- View or edit discussion properties, page 175
- Add a discussion topic, page 176
- Chapter 18, Permissions and Roles

View or edit discussion properties

To view or edit discussion properties:

1. Open the **Discussion Properties** dialog box, as described in View or edit item properties, page 102.
2. On the **General** tab, view or edit properties as follows:

Field	**Description**
Name	A name for the discussion that is unique in the space
Owner	The member with Content Owner privileges to the discussion. Click to change the owner of the discussion.
Template (read-only)	The name of the template used to create the discussion
Layout type (read-only)	Whether the layout of the discussion home page can be changed

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.

3. On the **Permissions** tab, view or edit discussion permissions, as described in View or edit item permissions, page 105.
4. On the **Version** tab, view or edit version settings for the discussion, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 14, Discussions

View a discussion topic

To view a discussion topic, do one of the following:

Action	Context
• Click the topic icon or the name of the topic. • Right-click the topic and select **View Topic** from the shortcut menu.	In the navigation tree of a space in **Content** view, with the parent discussion expanded
• Double-click the topic icon . • Right-click the topic and select **View Topic** from the shortcut menu. • Select the topic and click **View Topic** in the page toolbar.	• On the home page of a discussion • In search results • In **Tag** view of a space
• Pause the cursor over the topic icon , and then click **View** in the preview panel. • Click the name of the topic.	• On the home page of a discussion • In search results • In **Tag** view of a space • In the following widgets: — **Recent Activity** — **Recent Topics** • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Topics**
Click the topic.	In the **Recent Entries** area of the preview panel for a discussion

All replies to the topic appear in the pane below the topic content. The pane also shows how many replies there are and how many of them you have not read.

For information about editing a discussion topic page, see Edit an item page, page 127.

Related topics

- Chapter 14, Discussions
- Add a discussion topic, page 176
- Add a reply to a discussion topic, page 178

Add a discussion topic

You must have at least Create permission for the discussion in which to add the topic.

To add a discussion topic:

1. Do one of the following:
   - On the discussion home page, click **New Topic** in the **Actions** toolbar.
   - Right-click a discussion and select **New Topic in this Discussion** from the shortcut menu in the following contexts:
     — In **Content** view of a space, in the **Content** area displaying the root of the content library
     — In the navigation tree
     — In a contents widget
2. The new topic is created in the specified discussion, and appears in edit mode. Modify the title and content as needed.
3. Do one of the following:
   - To save the topic and continue in edit mode, click **Save Draft**.
   - To save the topic and exit edit mode, click **Save**.
   - To discard your changes and exit edit mode, click **Cancel**.

The new topic initially has the same permissions as the discussion in which it is created.

Related topics

- Chapter 14, Discussions
- View a discussion, page 173
- Add a reply to a discussion topic, page 178

View or edit topic properties

To view or edit topic properties:

1. Open topic **Properties**, as described in View or edit item properties, page 102.
2. On the **General** tab, view or edit properties as follows:

Field	Description
Name	A name for the topic that is unique in the discussion
Owner	The member with Content Owner privileges to the topic. Click to change the owner of the topic.
Template (read-only)	The name of the template used to create the topic

   The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.

3. On the **Permissions** tab, view or edit permissions, as described in View or edit item permissions, page 105.

4. On the **Version** tab, view or edit version settings, as described in View or edit page or file version settings, page 237.
5. Click **OK** to save your changes.

Related topics

- Chapter 14, Discussions
- Add a discussion topic, page 176

Add a reply to a discussion topic

If you have Read and Comment permission in a space, you can add replies to discussion topics.

Note: Replies to topics are the same as comments on items and replies to comments on items (see Add comments on content, page 38 and Reply to a comment, page 39).

To reply to a topic:

1. View a topic, as described in View a discussion topic, page 175.
2. Click **New Reply** to add a reply to the topic, or click **Reply to this** to reply to another reply.
3. Type your reply.
4. Click **Post**.

   The new reply appears below the content of the topic.

Once the reply is posted, you can modify it by clicking **Edit**. To delete a reply, click **Delete**.

Related topics

- Chapter 14, Discussions
- View a discussion, page 173
- Comment on content, page 37

Delete a discussion topic

If you are a space coordinator, or if you have Delete rights to the discussion, you can delete a discussion topic.

To delete a discussion topic:

1. Do one of the following:

<table>
<tr><th>Action</th><th>Context</th></tr>
<tr><td>Select Delete Topic from the Topic Actions menu.</td><td>On the topic page</td></tr>
<tr><td>For a single topic, do either of the following:
Right-click the topic and select Delete Topic from the shortcut menu.
Select the topic, and then select Delete Topic from the More menu.
For multiple items, do either of the following:
Select multiple topics (or items, including topics), right-click, and then select Delete.
Select multiple topics, and then select Delete from the More menu.</td><td>On the discussion home page
In Search view of a space, or on a search tab
In Tag view of a space</td></tr>
</table>

Note: Actions in the context of **Search** and **Tag** views apply to details or thumbnails view only.

2. In the **Delete Discussion Topic?** dialog box, click **OK** to confirm that you want to delete the selected topic, and all of the associated attachments, permanently from the discussion.

Related topics

- Chapter 14, Discussions

Chapter 15

Data Tables

This section is organized into the following topics:

About data tables — A data table is a structured collection of information, organized in a series of entries. An entry is an organized set of data in fields defined in the schema for the data table.

Data tables can be added to a space wherever you can add folders — at the top level of a space, or within a folder. In addition, data tables can be attached to other data tables and to data table entries. However, data tables cannot be attached to a page.

You can subscribe to a CenterStage data table, watch a data table, tag a data table, comment on a data table, and save a data table as a template. See the following topics for more information:

- Subscribe to content, page 74
- Watch content, page 74
- Chapter 9, Tags
- Comment on content, page 37
- Chapter 20, Templates

Note: In a repository location (for example, a cabinet or folder), you can view a data table but cannot edit it. Nor can you create, copy, or move data tables into a repository location. Data tables in a repository do not allow creation or editing of entries, and follow the other general restrictions that apply to repository items, such as no controls for tagging.

Data table page views — Data table page views are as follows:

Page view	Description	Help topic
Data table home page, also known as the summary view of a data table	The data table home page (summary view) shows: • A welcome message (if any) • The list of entries in the data table, with page controls to display additional pages of entries, if necessary • A link to **Attachments** view of the data table (in the page footer). Data tables can have the following types of attachments: data tables, folders, and files. • A **Tags** area • A **Comments** area	View a data table, page 183
Attachments view	Shows the files attached to the data table home page.	View attachments to a page, page 213

Summary view of data table entries — In the summary view of a data table, entries are organized in rows, and field values for entries are organized in columns. The data table schema determines the fields that appear in the summary view. On the data table home page, you can hide or show any of the fields set to appear in the summary view. You can also change the order in which they appear. See Organize the data table entries list, page 185.

Data table entry page — The data table entry page appears when you create, edit, or view an entry. All of the fields in the data table appear on the entry page. The entry page has two modes: edit and view. When you view an entry, it is initially in view mode. When you add an entry, it is initially in edit mode. See the following topics related to data table entries:

- View a data table entry, page 205
- Add an entry to a data table, page 207
- Edit a data table entry, page 207

Data table schema — Data table fields and settings make up the *schema* for a data table. The schema determines the following about a data table:

- The type of data that entry fields contain when adding or editing entries
- The layout and configuration of fields on entry pages when viewing or editing entries
- Whether entry pages have a comment area

- The columns in the summary view on the data table home page
- The fields available for filtering entries in the summary view
- The field used as the title in the summary view (the field you click to display a particular entry)

You edit the data table schema, as described in Configure data table fields and settings, page 190.

Organize data tables and entries — You organize data tables as you do other items in the content library: manage properties and permissions, copy, cut, paste (the item or a link to the item), drag-and-drop, or delete, or share a data table.

Related topics

- Copy items, page 81
- Move items, page 87
- Drag and drop items, page 92
- Paste items as links, page 95
- Delete items, page 96
- Share content, page 41
- View or edit item properties, page 102
- View or edit item permissions, page 105

View a data table

To view a data table, do one of the following:

Action	Context
• Click the data table icon or the name of the data table • Right-click the data table and select **View Data Table** from the shortcut menu.	In the navigation tree of a space or repository in **Content** view
• Double-click the data table icon . • Right-click the data table and select **View Data Table** from the shortcut menu. • Select the data table and click **View Data Table** in the page toolbar.	• In the **Content** area of a space or repository in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** widget

Action	Context
• Pause the cursor over the data table icon, and then click **View** in the preview panel. • Click the name of the data table.	• In the content area of a space or repository in **Content** view • In a folder • In search results • In **Tag** view of a space • In **Attachments** view of a data table or the **Attachments** field (if any) of a data table entry in view mode • In a **Contents** or a **Recent Activity** widget • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Data Table Entries**
Click the data table.	In the **Recent activity** area of a preview panel

In the toolbar of the data table home page, the **More** menu provides the following actions that you can perform on entries:

Action	Help topic
Share Entry	Share content, page 41
Cut **Copy** **Paste**	• Move items, page 87 • Copy items, page 81
Delete Entry	Delete items, page 96
Select All	
Lifecycle	Chapter 21, Lifecycles
Entry Properties	View or edit item properties, page 102

Related topics

- Chapter 15, Data Tables
- Comment on content, page 37
- Watch content, page 74

- Drag and drop items, page 92
- Chapter 9, Tags

Organize the data table entries list

In summary view of a data table, the data table entries list displays up to 25 entries per page. To see more entries, use the pagination controls in the status bar of the entries list.

Columns in the data table entries list show the fields that are set to appear in the entries list, according to the data table schema. The first column is always a lock column, which shows a lock icon for each entry locked for editing. A tooltip identifies the member who has the entry locked.

You can organize columns in the entries list, as follows:

Task	Description	Action
Sort a column	The default sort order is reverse chronological order of creation date, with most recent entries first. Each data type has its own sorting rules.	Click a column heading to reverse the sort order. Or, do the following: 1. Point to a column heading, and then click . 2. Select **Sort Ascending** or **Sort Descending** to specify a sort order.
Hide, show, reorder, or resize columns	By default, all fields that are set to show in the entries list (in the schema) appear in the order in which they are arranged in the list of **Fields that can appear in the Entries List**. You can hide or show the columns that the schema defines to show in the entries list, and change the order in which they appear. You can also change the width of a column. Column preferences are saved per user across sessions, and are also saved when copying and moving data tables.	To hide or show columns: 1. Point to a column heading, and then click . 2. On the **Columns** submenu, click to add a checkmark for a column to show; click to remove a checkmark for a column to hide. To change the order, or reposition a column, click and drag it to a new location. To change the width of a column, point to the boundary between two column headers, and then click and drag to resize.

Related topics

- Chapter 15, Data Tables

Search for data table entries

In summary view of a data table, you can search for entries using either the data table search field or the filter fly-out panel.

To search for entries using the search field:

1. In the search field in the data table toolbar, type the text for which to search.
2. Click  to start the search.

   CenterStage searches through all plain text and rich text fields (including fields that use plain text) and returns any entries that contain the phrase in any of the fields. If any search filters are in effect, the filters are not cleared and the results are limited by the selected filter options.

To search for entries using the search filter:

1. Next to the search field in the data table toolbar, click .

   The search filter fly-out panel appears and shows controls for searching within the data table fields selected to filter data table entries. Any text in the search field appears in the **Search for** field on the fly-out.
2. Optionally, in the **Search for** field, type the text to filter in the specified fields. See Data table search filter, page 186 for details about fields in the search filter fly-out.

   Filtering applies to the complete set of entries, not only to the visible entries. Therefore, hidden fields can still appear in the search filter fly-out panel.
3. Click **Search** to launch the filter search.

   Search results appear in the entries list. If the search filter fly-out panel is closed and filters are in effect, the filtered set of entries appears in the list. Filtered search results show up to 150 entries. The entire set of entries can still be exported to a CSV file, as described in Export data table entries, page 211.

Note: To clear the filters, click **Reset** in the search filter fly-out panel.

Related topics

- Chapter 15, Data Tables
- Data table search filter, page 186

Data table search filter

Use the search filter fly-out panel to search within **Fields that can be used to filter the Entries List**, as specified in the data table schema, which is described in Configure data table fields and settings, page 190. Filter controls for each type of field are as follows:

Field type	**Filter control**
Search for	Text box for entering values, same as the search box on the toolbar
Changed	Date control for choosing dates
Changed by	Control for choosing members, restricted to only members who have edited any of the entries
Plain text	Text box for entering values
Rich text	Same as for plain text
Autonumber	Same as for number
Yes/No	Drop-down list box with the following choices: • (blank) • **Yes** • **No**
Traffic light	Radio buttons for the following choices: • **Any** (default) • "Red" • "Yellow" • "Green" • **None**
Choice list	Radio buttons with the following options: • **Any** (default choice) • **Only show blank entries** • **Only show entries that are not blank** • **Any of these choices** (followed by a list of choices): — For a single-select choice list, you can choose only one. — For a multi-select choice list, you can **Ctrl**-click to select more than one. • For a multi-select choice list only, **All of these choices**, followed by a box showing the available choices to select

Field type	Filter control
Date	Drop-down list box with the following choices: • **any date** (default) • **on** (select a date using date picker) • **before** (select a date using date picker) • **after** (select a date using date picker) • **between** (select a date range using the two date pickers) **Note:** The start and end dates of the range are included in the filtered results. • If the date is a due date, a **Status** list box provides the following options: — **any** (default) — **Completed** — **Not Completed**
Member list	Radio buttons with the following choices: • **Any** (default) • **Only blank entries** • **Only entries that are not blank** • For a single selection, **These members**: — A standard member picker if scoped to the space — A multi-select box with the available choices if scoped to a subset of the space • For a multiple selection, **Any of these members** or **All of these members**: — A standard member picker if scoped to the space — A multi-select box with the available choices if scoped to a subset of the space
Lifecycle	A multi-select drop-down list box that displays all the Lifecycle states available within the table

Related topics

- Chapter 15, Data Tables

Add a data table

You can add a data table at the top level of a space, within a folder, as an attachment to another data table or, if the schema allows, to a data table entry. To add a data table, you must have at least Create permission for the location in which to create it.

To add a data table:

1. Open **Content** view of a space, as described in Content view of a space, page 50.
2. Do one of the following:
   - In the page toolbar at the top level of a space, or in a CenterStage container, select **New >** **Data table**.
   - In the navigation tree, right-click the top node of the space, or a CenterStage container, and then select **New >** **Data table**.
   - In the content area, right-click a CenterStage container, and then select **New >** **Data table**.
   - In **Attachments** view of a data table, select **New >** **Data table**.
   - In an **Attachments** field widget that has focus in a data table entry in view mode, select **New >** **Data table**.

   The **New Data Table** dialog box appears, and presents a two-step wizard to create the data table.
3. Complete the first step of the wizard, as follows:

Field / Control	Action
Data table name (required)	Type a name that is unique in the space.
Choose a template	Select one of the available templates.
Next	Click to go to the next step in the wizard.

4. In the second step of the wizard, type an optional **Welcome Message**.
5. Click **Create** to create the data table.

If you selected the **Blank** template for the data table, the **Fields and Settings** page appears. Otherwise, the data table home page appears.

Data table permissions

The initial permissions of a new data table are either a copy of the space permissions (if created at the top level of the space), or the parent permissions (if created in a folder, or as an attachment to a data table or entry).

Related topics

- Chapter 15, Data Tables
- Configure data table fields and settings, page 190

- View or edit data table properties, page 204
- View or edit item permissions, page 105

Configure data table fields and settings

To configure data table fields and settings (the data table schema), you must have Edit rights to the data table. Changes to the data table schema are applied to all existing entries. Only one person can configure the data table at a time. No new entries can be added while the data table is being configured.

To edit data table fields and settings:

1. Do one of the following:
   - In summary view of a data table, select **Configure Fields and Settings** from the **Data Table Actions** menu.
   - Right-click a data table and select **Configure Fields and Settings** from the shortcut menu.

   The **Fields & Settings** page opens.
2. Configure fields and settings as follows:

Task	Action
Add fields	1. In the page toolbar, click **Add Fields to Data Table**. 2. Drag a widget and drop it onto the page, or double-click the widget. If the widget is a type of data field with configuration options, the configuration dialog box appears. For information about data types and configuration options, see Data table entry field types (widgets), page 192.
Remove fields	For each field to delete, click in the upper-right corner of the widget header bar. **Note:** You cannot remove the field designated as the entry title.

Task	Action
Configure fields	To display the configuration dialog box for a field, click in the upper-right corner of the widget header bar. For information about configuration options for field types, see Data table entry field types (widgets), page 192.
Organize fields	• To move a field widget, click and drag the header bar and drop it in the appropriate location. • To arrange widgets in columns, add a column box widget to the page, and then move widgets into the appropriate columns. • To place widgets together, add a group box widget to the page, and then move widgets into the box in the appropriate order. **Note:** You can nest column and box widgets to compose a layout of widgets as appropriate.

3. To have a comment area on entry pages in the data table, select the checkbox labeled **People can comment on entries in the data table**.

   Note: Comments are enabled by default in a data table. To disable comments, clear the checkbox.

4. Select the **Entry Title** from the dropdown list. Choices include all fields in the data table that can be used as an entry title:

   - Plain text
   - Rich text
   - Number
   - Autonumber
   - Member list

   The entry title appears at the top of the entry page. The title serves as the name of an entry in a list, such as on the data table home page, as well as in search results.

   The entry title field is a required field and cannot be deleted.

5. Set the following **Entries List Fields Options**:

   - **Fields that can appear in the Entries List**
   - **Fields that can be used to filter the Entries List**

   Use the left and right arrow buttons to move fields between the **All Fields** and **Selected Fields** lists.

   Note: New fields you add to the data table schema appear in the **Selected Fields** lists by default. To remove a field from the entries list or from the set of fields used to filter the entries list, move the field from the **Selected Fields** list to the **All Fields** list.

6. Click **Save** to put your schema changes into effect for the data table.

Initial field values — For some fields, you can specify a default value that appears in that field when you create an entry.

Note: Default content for a rich text widget does not support images and links, so buttons to add image and add link do not appear. However, you can still add images and links to individual entries. The rich text widget supports a maximum of 9,000 characters as an initial value, but there is no character limit on individual entries.

Related topics

- Chapter 15, Data Tables

Data table entry field types (widgets)

Data table entry field widgets have the following possible states:

Mode	Description
Configuration mode	For data types with configuration options, the configuration dialog box that appears when you add a widget to the **Configuration fields and settings** page when editing the data table schema
Entry master page mode	The appearance of the widget and any field-specific controls (such as a default setting or value) on the **Configuration fields and settings** page (after any configuration options are specified) when editing the data table schema. Any field values, selections, or widget content are saved as default values for new entries.
Data entry mode	The appearance of the widget and any field-specific controls when editing a data table entry
View mode	The appearance of the widget and any field-specific controls when viewing a data table entry
Entries list mode	The appearance of the widget and any field-specific controls when viewing the entries (summary) list on the data table home page

Data types

The types of data table entry fields (widgets), their configuration options, and their features in entry master page, data entry, view, and entries list mode, are as follows:

- Plain Text
- Rich Text

- Informational Text
- Number
- Autonumber
- Choice List
- Member List
- Traffic Light
- Yes/No
- Date
- Lifecycle
- Attachments
- History

Plain Text	
Description	Text with no rich-text formatting
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **Character Limit** (required) – The number of characters that can be entered into the field. The default is 80, and the range is 1 - 255, inclusive. **Note:** When you initially create a data table, the character limit for a plain text field must be at least 80 characters. To define a plain text field with a lower character limit, delete the initial plain text field and create a new one. In this case the minimum can be any number you specify. • **Multiple lines** – When selected, the entry field is five lines tall, with a scrollbar if necessary. Otherwise, the field is one line tall. • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry name field, the checkbox is selected and disabled (read-only).
Entry master page mode	• A single- or multi-line text box, according to whether **Multiple lines** is selected

Plain Text	
Data entry mode	• A single- or multi-line text box, according to whether **Multiple lines** is selected • The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the field is empty when you save the entry.
View mode	• A single- or multiple-line box with read-only plain text • Empty if there is no value
Entries list mode	Empty if there is no value

Rich Text	
Description	Formatted text with fonts, colors, graphics, and links
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry name field, the checkbox is selected and disabled (read-only).
Entry master page mode	• On the master page, the rich text widget does not support images and links (images and links can be added to individual entries, however). • On the master page, the rich text widget supports a maximum of 9,000 characters (however, there is no character limit on individual entries).
Data entry mode	• The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the field is empty when you save the entry. Inserting an image is the same as for any rich text widget, as described in Rich text editing, page 28, except that you can only import images from the local system or display images through their web address (URL).

Rich Text	
View mode	Same as a rich text widget on a page
Entries list mode	Same as in view mode

Informational Text	
Description	Formatted text that is read-only when editing an entry
Configuration options	This field has the title **Informational Text**, and has no configuration options. Specify rich text to appear as read-only instructions or information on the entry page. Images and links are not supported for informational text.
Entry master page mode	• The master page is the only place that the text in the informational text widget can be edited. • The informational text widget does not support images or links.
Data entry mode	The field is fixed, so the text cannot be edited in data entry mode. It appears the same as a rich text widget in view mode.
View mode	Same as data entry mode
Entries list mode	Does not appear in the entries list

Number	
Description	Numeric values, including decimals
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry name field, the checkbox is selected and disabled (read-only).
Entry master page mode	• A single-line text box showing whatever allowed characters are entered into the field

Number	
Data entry mode	• A single-line text box (as for the **Plain Text** field) • Populated with the initial value from the schema, if any. • If the field is required, an error appears if the field is empty when you save the entry. • If the number has more than 38 digits, it is stored as a character and column sorting is lost.
View mode	• Displays numeric value as read-only plain text. • If no value, field is empty.
Entries list mode	Same as in view mode

Autonumber	
Description	Numeric values generated automatically when you create an entry. You cannot edit autonumber fields.
Configuration options	**Title** (required) – The title that appears in the header bar of the field
Entry master page mode	Read-only message that the number will be set automatically when saving the entry
Data entry mode	Numbers are assigned to entries in the order in which they are created.
View mode	Shows a read-only number
Entries list mode	Same as in view mode

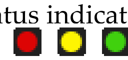
Choice List	
Description	List of predefined values

Choice List	
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **Allow multiple choices** – When selected, more than one value choice can be specified for the field. • **Choices** (required) – Specify value choices, one per line. • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry name field, the checkbox is selected and disabled (read-only).
Entry master page mode	Shows one of the following: • A drop-down list showing blank and user choices • A multi-select box showing each choice on a single line. **Ctrl**-click to select or deselect multiple options for default selection.
Data entry mode	• Shows one of the following: — For a single-selection choice field, shows a drop-down list with blank and user choices. Select one. — For a multi-selection choice field, shows a drop-down with user choices. Select one or more (with **Ctrl**-click), or none. • The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the field is empty when you save the entry.
View mode	Shows the selected choice, read-only. Multiple choices are comma-separated. If no selection, the field is blank.
Entries list mode	Same as in view mode

Member List	
Description	List of space members

Member List	
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **Members** – Select one of the following scopes: — **All members in the space** (default) — **Only these members** When this option is selected, use the member picker to select multiple members, groups, and roles. Selected roles and groups, themselves, are choices, not the members in them. Custom roles display in the picker (but not the built-in roles of Coordinator and Participant). • **Allow multiple choices** – When selected, more than one value choice can be specified for the field. • **Choices** (required) – Specify value choices, one per line. • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry title field, the checkbox is selected and disabled (read-only).
Entry master page mode	• With **Members** scope set to **All members in the space**, use the member picker to make either a single- or multiple-member selection, according to whether **Allow multiple choices** setting is on. • With **Members** scope *not* set to **All members in the space**, and a single selection is allowed, select one of the following choices from the drop-down list: — Blank (default) — Select a member from the configured set of members, listed in alphabetical order by display name • With **Members** scope *not* set to **All members in the space**, and a multiple selection is allowed, select the appropriate checkboxes to choose members from the configured set

Member List	
	of members, listed in alphabetical order by display name.
Data entry mode	Same as for entry master page mode, except: • The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the field is empty when you save the entry.
View mode	Shows a read-only, comma-separated list of the selected members, sorted alphabetically by display name. If there is no selection, the field is blank.
Entries list mode	Same as in view mode

Traffic Light	
Description	Color-based status indicator
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • Select one of the following styles to use as status indicators for the field: –  (default) –  –  –  –  • **This field is required** – When selected, a value for the field is required for the entry.
Entry master page mode	Shows the status indicators, including none, as in the following example: 

Traffic Light	
Data entry mode	Same as for entry master page mode, except: • The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the 'None' choice is selected when you save the entry.
View mode	Shows an image of the selected status indicator, or blank if the 'None' choice is selected
Entries list mode	Same as for an entry page in view mode

Yes/No	
Description	**Yes**, **No**, or blank value
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **This field is required** – When selected, a value for the field is required for the entry. If the field is the entry name field, the checkbox is selected and disabled (read-only).
Entry master page mode	A drop-down list with the following choices: • Blank (default) • **Yes** • **No**
Data entry mode	Same as for entry master page mode, except: • The field is populated with the initial value from the schema, if any. • If the field is required, an error appears if the 'None' choice is selected when you save the entry.
View mode	Shows the selected choice, read-only. If there is no selection, the field is blank.
Entries list mode	Same as for an entry page in view mode

Date	
Description	Calendar date

Date	
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **Initial date** – Choices are as follows: — **Blank** (the default) — **Date created** (automatic value) — **Date created plus *n* days**, where *n* can be an integer between -365 and 365, inclusive. • **This is a due date** – When selected, the specified value represents a deadline, and the date field on the entry page has a checkbox labeled **Completed**, which is empty (unfinished) by default. • **Required** – When selected, a value for the field is required for the entry.
Entry master page mode	• A standard date picker, which is disabled if the initial date setting is **Date created** or **Date created plus *n* days**. Dates are calculated and displayed according to the time zone of your local computer. • **Completed** checkbox, shown only if **This is a due date** is selected.
Data entry mode	• Entry mode is the only place you can change the date (except for setting a default date on the entry master page) or change the **Completed** checkbox, if it is enabled. • Works the same as for entry master page mode, except: — The calendar picker is populated with initial values from the schema, if any. — The **Completed** checkbox is enabled — If the field is required, an error appears if there is no selection when you save the entry.

Date	
View mode	• For the date, shows read-only date, in the standard format. Blank if no date. • When **This is a due date** is enabled, text below the date shows either "Not completed" or a checkmark and "Completed."
Entries list mode	• Shows the read-only date, in the standard format. • If the "Completed" checkbox is selected, a checkmark appears before the date. • Blank if no date.

Lifecycle	
Description	• Using the lifecycle field, you can apply a lifecycle to a data table. • Each entry can move between lifecycle states independently. • Upon changing the lifecycle attached to a table, any existing entries will keep the previous lifecycle and state, and only new entries will get the newly selected lifecycle and initial state. • When adding a lifecycle field after some entries have been created, existing entries will not have a lifecycle attached, only new entries will get a lifecycle and initial state. • After deleting the lifecycle field after some entries have been created, existing entries will maintain the lifecycle and state, and state can be changed in the usual way. The lifecycle field will no longer appear in view mode for existing entries. New entries will not get a lifecycle and initial state control for applying a lifecycle to a data table entry.

Lifecycle	
Configuration options	• **Title** (required) – The title that appears in the header bar of the field • **Lifecycle for data table** – Drop-down list of choices for all of the lifecycles available to the data table • **Initial state for new entries** – Drop-down list of choices for all of the states for the selected lifecycle that can be used as an initial state. States are listed in sequential order in the lifecycle.
Entry master page mode	• **Lifecycle for data table** (read-only text) – Shows the name of the lifecycle that has been applied to the data table • **Initial state for new entries** (read-only text) – Shows the name of the default initial state for new entries to the data table, read only
Data entry mode	• **Lifecycle** – Shows the read-only name of the selected lifecycle • **Current State** – Shows the read-only name of the state for the selected lifecycle Lifecycle state for an entry cannot be changed in data entry mode.
View mode	• **Lifecycle** – Read-only name of the selected lifecycle • **Current State** – Read-only name of the state for the selected lifecycle
Entries list mode	Shows the selected lifecycle state, read-only. The lifecycle state for an entry can be changed in the summary view using the **More > Lifecycle** menu in the toolbar.

Attachments	
Description	Attachments to the entry
Configuration options	This field has no configuration options.
Entry master page mode	Read-only message that attachments to entries can be added or removed only while viewing the entry (view mode)

Attachments	
Data entry mode	Disabled so that no attachments can be added or removed
View mode	Same as **Attachments** view of a data table, as described in View attachments to a page, page 213
Entries list mode	Does not appear in the entries list

History	
Description	Change log for an entry
Configuration options	This field has no configuration options.
Entry master page mode	Read-only message that the history of entries will display in the field
Data entry mode	• **Changed** – when the change occurred • **Changed by** – who made the change • **Field** – which field changed • **Change Summary** – a summary of the change Read-only datagrid with the following columns:
View mode	Same as data entry mode
Entries list mode	Does not appear in the entries list

Related topics

- Chapter 15, Data Tables
- Configure data table fields and settings, page 190

View or edit data table properties

To view or edit data table properties:

1. Open the **Data Table Properties** dialog box as described in View or edit item properties, page 102.

2. Complete or modify the **General** tab as follows:

Field	Action
Name	Modify the name of the data table.
Owner	The member with Content Owner privileges to the data table. Click to change the owner of the data table.
Template (read-only)	The name of the template used to create the data table

The space content policy determines the properties that appear on the **General** tab. See Content policy, page 55.

3. View or edit data table permissions on the **Permissions** tab, as described in View or edit item permissions, page 105.

4. Click **OK** to save your changes.

Related topics

- Chapter 15, Data Tables
- Configure data table fields and settings, page 190

View a data table entry

To view a data table entry, do one of the following:

Action	Context
• Click the entry icon or the name of the entry. • Right-click the entry and select **View Entry** from the shortcut menu	In the navigation tree of a space in **Content** view, with the parent data table expanded
Click the name of the entry.	• In summary view of a data table, as described in View a data table, page 183. • In search results • In **Tag** view of a space • In a **Recent Activity** widget

Action	Context
	• In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Data Table Entries**
• Double-click the entry icon . • Right-click the entry and select **View Entry** from the shortcut menu	• In search results • In **Tag** view of a space
Select the entry and click **View Entry** in the page toolbar.	• In summary view of a data table • In search results • In **Tag** view of a space
Pause the cursor over the entry icon , and then click **View** in the preview panel.	• In search results • In **Tag** view of a space • In a **Recent Activity** widget • In the following views of the **My Community** tab: — **New in CenterStage** — **All Recent Activity** — **Recent Data Table Entries**
Click the entry.	In the **Recent Entries** area of the preview panel for a data table

Navigating entries — To navigate between entries without returning to the data table home page, click (previous entry) and (next entry) in the entry toolbar. The buttons display entries according to the order in which they are sorted by column. If you filter the summary view, as described in Search for data table entries, page 186, the buttons navigate through the filtered set of entries only.

Note: If you navigate to an entry through a bookmark, the and buttons are unavailable because the system cannot determine the order of entries.

To display the data table home page from an entry page, do one of the following:

- Click in the data table toolbar to return summary view.
- Click the name of the data table in the breadcrumbs.
- Select **Show Data Table Home** from the **Entry Actions** menu.

For information about editing a data table entry, see Edit a data table entry, page 207.

Related topics

- Chapter 15, Data Tables
- Data table entry field types (widgets), page 192

Add an entry to a data table

To add an entry to a data table, you must have at least Create permission for the data table.

To add a data table entry:

1. Do one of the following:
   - On a data table home page, click **New Entry** in the data table actions toolbar.
   - Right-click a data table and select **New Entry in this Data Table** from the shortcut menu in the following contexts:
     — In **Content** view of a space, in the **Content** area displaying the root of the content library
     — In the navigation tree
     — In a contents widget

   The entry page opens in data entry mode.
2. Specify data in fields in the entry. For information about data types and their features in data entry mode, see Data table entry field types (widgets), page 192.
3. Click **Save** to create the entry.

Related topics

- Chapter 15, Data Tables
- Edit a data table entry, page 207

Edit a data table entry

To edit a data table entry:

1. Do one of the following
   - On a data table home page, select **Edit Entry** from the **Entry Actions** menu.
   - In **Search** or **Tag** view of a space, or on a search tab, right-click an entry and select **Edit Entry** from the shortcut menu.

   The entry page opens in data entry mode.
2. Modify data in fields in the entry. For information about data types and their features in data entry mode, see Data table entry field types (widgets), page 192.
3. Click **Save** to put your changes into effect for the entry.

Related topics

- Chapter 15, Data Tables
- Data table entry field types (widgets), page 192

View or edit data table entry properties

To view or edit data table entry properties:

1. Open the **Data Table Entry Properties** dialog box as described in View or edit item properties, page 102.
2. Complete or modify properties on the **General** tab, as appropriate.
3. View or edit data table permissions on the **Permissions** tab, as described in View or edit item permissions, page 105.
4. Click **OK** to save your changes.

Related topics

- Chapter 15, Data Tables
- Configure data table fields and settings, page 190

Delete a data table entry

If you are a space coordinator, or if you have Delete rights to the data table, you can delete a data table entry.

To delete a data table entry:

1. Do one of the following:

Action	Context
Select **Delete Entry** from the **Entry Actions** menu.	On the entry page
For a single entry, do either of the following: • Right-click the entry and select **Delete Entry.** • Select the entry, and then select **Delete Entry** from the **More** menu. For multiple items, do either of the following: • Select multiple pages (or items, including entries), right-click, and then select **Delete**.	• On the data table home page • In **Search and filter** view of a space, or on a search tab • In **Tag** view of a space

Action	Context
• Select multiple entries, and then select **Delete** from the **More** menu.	

Note: Actions in the context of **Search** and **Tag** views apply to details or thumbnails view only.

2. In the **Delete Entry?** dialog box, click **OK** to confirm that you want to delete the selected entry, and all of the associated attachments, permanently from the data table.

Related topics

- Chapter 15, Data Tables
- View a data table entry, page 205
- Add an entry to a data table, page 207

Import data table entries

To import data table entries from a CSV file (including CSV files from eRoom 7.*x*), you must have at least Create permissions for the data table.

To import data table entries:

1. On the data table home page, select **Import Entries** from the **Data Table Actions** menu.

   The **Import Data Table Entries** dialog box (wizard) appears.
2. In the wizard step 1 of 2, click **Browse** to select a CSV file to import, and then click **Next**.
3. In step 2, click **Import** to import the file with the mappings indicated, or click **Back** to select a different file to import.

   Entries are imported according to the following rules for mapping data types:

Data type	Import rules
Plain text	No restriction; unaffected by the **Max Length** property (if any) of the field
Formatted text	• Same filtering is used as with the Rich Text Editor in CenterStage • Maximum length equivalent to length that a rich text object can contain

<table>
<tr><th>Data type</th><th>Import rules</th></tr>
<tr><td>Date</td><td>Must match the supported date formats for the operating system, otherwise discarded
If field is marked is due date, the system looks for a "due" header named name of date column_status. In that column, 1 maps to Done and anything else maps to Not Done. If there is no "due" header, all dates are considered Not Done.</td></tr>
<tr><td>Number</td><td>Must match the supported number formats for the operating system, otherwise discarded</td></tr>
<tr><td>Autonumber</td><td>Not supported; numbers are assigned automatically in the order the entries are imported, starting with the first never-used number</td></tr>
<tr><td>Yes/No</td><td>Yes = 1
No = 0
Blank = ""
All other values map to "blank"</td></tr>
<tr><td>Traffic light</td><td>Red = -1
Yellow = 0
Green = 1
Blank = ""
All other values map to "blank"</td></tr>
<tr><td>Choice list</td><td>If the value is enclosed in single or double quotes, then commas within it are imported as comma characters. Or, if the field permits multiple choices, commas are interpreted as delimiting multiple values.
Values do not have to match the current list for the field.</td></tr>
<tr><td>Member list</td><td>Same interpretation of commas as for choice list
Values are imported only if they match a repository member</td></tr>
<tr><td>Lifecycle</td><td>Not mapped</td></tr>
<tr><td>Discussion area</td><td>Not supported</td></tr>
</table>

Data type	Import rules
Change log/History	Not mapped
Attachments area	Not mapped

When importing entries, CenterStage preserves values, even if they conflict with the data table schema, as in the following cases:

- Blank value for a required field
- Unrecognized value for a choice-list field
- Multiple values for a single-value choice-list or member-list field

Related topics

- Chapter 15, Data Tables

Export data table entries

To export a data table to a CSV file, you must have Read permissions for the data table and use the CenterStage plug-ins.

To export entries in a data table:

1. On the data table home page, select **Export Data Table** from the **Data Table Actions** menu.
2. Complete the **Export Data Table Entries** dialog box as follows:

Field	Description
List of mapped fields	Displays the fields from the data table to map to a CSV file format
Count of entries	Shows the number of the entries to export
Use HTML to preserve rich text and links (hidden if no rich text)	If this checkbox is selected (the default), rich text formatting and hyperlinks are exported as HTML. Otherwise, rich text and hyperlinks are ignored.

3. Click **Export** to save the exported data table entries in a file that you specify using the browser's **Save** dialog box

   Data is exported according to the same mapping rules for importing entries, which are described in Import data table entries, page 209. In addition:

   - Non-field widgets, such as attachments and history, are not exported.
   - Entries in the CSV file are in the same order as the entries list at the time of export.
   - If the entries list is not filtered, all entries are exported, even if they are not visible on the current page.
   - If the entries list is filtered, only entries that appear in the filter are exported.

Note: Data exported to a file in one locale, and then imported to a data table in a different locale, retains the format of the locale associated with the user performing the export.

Related topics

- Chapter 15, Data Tables

Chapter 16

Attachments

This section is organized into the following topics:

About attachments — Attachments are files attached to an item page. For an item page, you can view a list of file attachments, view a particular attachment, add an attachment, or delete an attachment. Attachments can have versions like all other files.

View attachments to a page

To view page attachments:

1. Open an item page, as described in the following topics:
   - View a discussion, page 173
   - View a discussion topic, page 175
   - View a blog, page 163
   - View a blog post, page 165
   - View a wiki, page 153
   - View a wiki page, page 156
   - View a data table, page 183
   - View a data table entry, page 205
2. View attachments by doing one of the following:
   - On an item home page, select **Show Attachments** from the ***Item* Actions** menu.
   - In the footer of an item home page, click **Attachments to this *Item***.
   - View the **Attachments** field of a data table entry (if the schema for the data table includes an **Attachments** field).

In **Attachments** view or in an **Attachments** field, you can switch to details, thumbnails, or slides view, show or hide columns (in details view), drag-and-drop files, and import files. In addition to files, attachments to a data table or data table entry can include folders and data tables.

Actions you can perform in **Attachments** view or in an **Attachments** field are the same as the actions available on a folder page, as described in View a folder, page 69.

Note: You can also discover individual attachments through search and tags.

Related topics

- Chapter 16, Attachments
- Chapter 15, Data Tables
- Chapter 8, Search for Content
- View tags for a space, page 123

View a file attachment

To view a file attachment:

1. View the attachments to a page, as described in View attachments to a page, page 213.
2. View a file attachment, as described in View a file, page 73.

Related topics

- Chapter 10, Pages
- Chapter 16, Attachments

Add an attachment to a page

If you have Edit rights to an item page, you can add attachments. Item that can have attachments are as follows:

- Blogs
- Wikis
- Wiki pages
- Discussions
- Discussion topics
- Data tables
- Data table entries with **Attachments** fields

Adding a file attachment is the same as importing a file, which is described in Import files, page 77.

Note: In **Attachments** view of a data table, and in the **Attachments** field of a data table entry, you can attach folders and data tables in addition to files.

Related topics

- Chapter 10, Pages
- Chapter 15, Data Tables
- Chapter 16, Attachments

Delete an attachment

To delete an attachment (file, folder, or data table), you must have Edit rights to the page containing the attachment.

1. Open **Attachments** view, as described in View attachments to a page, page 213, or view a data table entry with an **Attachments** field, as described in View a data table entry, page 205.
2. In details or thumbnails view, do one of the following:
   - Right-click the attached item and select **Delete File** from the shortcut menu.
   - Select one or more attached items, and then select **More >** **Delete File** from the page toolbar.
3. Confirm the deletion.

All items in your selection that can be deleted, are deleted.

Related topics

- Chapter 16, Attachments
- Chapter 15, Data Tables
- Chapter 10, Pages

Chapter 17

Space Membership

This section is organized into the following topics:

About membership — Spaces have memberships that define who can access and contribute to the space. Members of a space have different types of permissions depending on their member roles.

Viewing members — You can view all the members of a space by clicking in the view panel of a space tab.

Member groups — Members can be part of a group that belongs to the space.

Member roles and permissions — A member that belongs to a group can have a role independent of the group role, but cannot be independently removed from the space.

Related topics

- Chapter 18, Permissions and Roles
- Change member roles, page 230
- Modify permissions settings for roles, page 231

View space members

To display the **Members** view, open a space as described in View a space, page 49, and then click in the view panel of the space tab.

If you are the space coordinator, you can perform the following tasks:

- Add members to a private space, page 220
- Remove space members, page 222
- Invite members to a space, page 223
- Change member roles, page 230

All space members can perform the following tasks:

- Search for members, page 218
- View member profiles, page 219
- Send e-mail to members, page 42

Related topics

- Chapter 17, Space Membership

Search for members

You can search for members in space **Members** view, or in the **Choose Members** dialog box. The **Choose Members** dialog box is displayed when you set permissions for an item, share a link to an item, or invite members to join a space, for example.

To search for members:

1. In the search field of the **Choose Members** dialog box, type all or part of the member, group name, or e-mail address.

   CenterStage lists all members and groups with names or e-mail addresses that match the characters you type.

2. To select a member or group in the results list, click the name and then click **Select**. To select multiple members, **Ctrl**-click to select non-adjacent members, or **Shift**-click to select contiguous members. Use the page controls at the bottom of the members list to view additional members.

3. Click **OK**, to select the members for the action you are performing.

Related topics

- Share content, page 41
- View or edit item permissions, page 105
- Chapter 17, Space Membership
- View space members, page 217
- View member profiles, page 219
- Remove space members, page 222
- Invite members to a space, page 223
- Send e-mail to members, page 42
- Change member roles, page 230

View member profiles

1. Open space **Members** view, as described in View space members, page 217.
2. In **Members** view, search for or select the member or group name.
3. Click **View** to open the **Member Profile** dialog box, which is described in Member and group profile information, page 219.
4. To close the **Member Profile** dialog box, click **Done**.

Related topics

- Chapter 17, Space Membership
- Search for members, page 218

Member and group profile information

System administrators create users in the Documentum repository that coordinators can add to a space, as described in Add members to a private space, page 220. Space coordinators who are also user managers can create "inline users" to add to a space, as described in Create new users to add to a space, page 221.

Each CenterStage member or group has a profile that derives from member information. See View member profiles, page 219.

The **Member Profile** dialog box displays information about individual members:

Field	Description
Name	The member name that appears, for example, in the **Created by** column for files in CenterStage.
Login Name	The member name used at sign-in.
Password	Visible only to space coordinators who are also user managers, the user password masked by bullet characters. If the current password is compromised or lost, select the checkbox to **Replace this password and send new credentials**. When you click **Save**, a new password is sent through e-mail to the member.
Email	The member e-mail address. You can send e-mail to a member by clicking the member e-mail address. If you are a space coordinator and a user manager, you can modify the **e-mail** field.
User Source	The means by which the member is a part of the space.

Field	Description
Visibility	Specifies whether the member is visible only to members in the same space, or by everyone. This field has one of the following values: • **Can be seen only by people who belong to the same spaces as <*Member Name*>** • **Can be seen by everyone**
State	The **Active** or **Locked** state of a member.
Groups	A list of the repository groups (if any) to which the member belongs, in alphabetical order. Member roles are excluded from this list.
Done, or Save and Cancel	Click **Done** to close the **Member Profile** dialog box, unless you are a space coordinator and a user manager. In that case, and if you select the **Replace this password and send new credentials** or modify the **e-mail** field, click **Save** to save your changes or **Cancel** to discard them and close the dialog box.

The **Group Profile** dialog box displays profile information about groups:

Field	Description
Name	The group repository name.
Owner	The name of the group owner.
Email	The group e-mail address.
Description	The group description (optional).
Administrator	The name of the group administrator.
Group Source	The means by which the group is a part of the space, visible to space coordinators only.
Groups	A list of the repository groups (if any) to which the group belongs, in alphabetical order. Role groups are excluded from this list.

Related topics

• Chapter 17, Space Membership

Add members to a private space

Only a space coordinator can add members to a private space. You cannot add members to public spaces because members are included automatically.

To add members to a private space:

1. Open space **Members** view, as described in View space members, page 217.
2. Click **Add members** to switch to add member mode.

   CenterStage lists all available repository users and groups, all current space members (shaded), and displays the first 25. Any additional current and potential members are listed on subsequent pages.

   You can search for members, as described in Search for members, page 218.
3. Select the users and groups to add to the space.
4. Either click **Add to Space** in the toolbar, or right-click and select **Add to Space** from the shortcut menu.
5. In the **Choose the roles** fly-out panel, select one or more roles to assign to the newly added members: **Coordinators** or **Participants**, or, if defined for the space, any custom roles.
6. To add the members, click **Add to space**.

   CenterStage adds the members to the space and displays their names as shaded.
7. Repeat steps 2 through 6 until you are finished adding members, and then click **Done** to exit add member mode.

   The **Invitation to join the space** dialog box opens.
8. Invite the newly added members now, as described in Invite members to a space, page 223, or click **Cancel** to invite the new members later.

Related topics

- Chapter 17, Space Membership
- Create new users to add to a space, page 221
- Chapter 18, Permissions and Roles

Create new users to add to a space

If you are a space coordinator who is also a user manager (that is, you are in the dce_user_manager role in the repository), you can create new "inline user" accounts to add to a public or private space. The Content Server authenticates these user accounts instead of a Windows or UNIX domain or an LDAP directory. For more information about signing in as an inline user, see Sign in, page 16.

Note: Do not create an account for someone if they already have one.

To create new users and add them to a space:

1. Open space **Members** view, as described in View space members, page 217.
2. Do one of the following:
   - For a public space – In the **Members** view toolbar, click **New user account**, which is only visible if you are a space coordinator who is a user manager as well.
   - For a private space – In the **Members** view toolbar, click **Add members** to switch to add member mode, and then click **New user account**.

The **New User Account** dialog box opens.

3. Complete **Step 1 of 3: CenterStage Credentials**, as follows:

Control/Field	Description/Action
Name	The member name, which must be unique in the repository.
Login name	The member name used at sign-in, which must be unique among inline users in the repository.
Email	The member e-mail address.
Password	Read-only field. The password is generated automatically.

   Click **Next**.

4. Complete **Step 2 of 3: Add to *Space Name*** by selecting one or more roles to assign to the newly created user: **Coordinator** or **Participant** (the default), or, any custom roles if they are defined for the space.

   Click **Next**.

5. In **Step 3 of 3: Confirm**, review the user settings and click **Create Account** to create the account.

   A message is automatically sent to the new user, inviting them to sign in.

For details on how an inline user signs in with a temporary password, see Sign in, page 16. The coordinator/user manager can reset the password to another random password later, as described in Member and group profile information, page 219.

Related topics

- Chapter 17, Space Membership

Remove space members

Only a space coordinator can remove members from a space.

To remove members from a space:

1. Open space **Members** view as described in View space members, page 217.
2. Select the members to remove.
3. Click  **Remove**.
4. Confirm or cancel one of the following actions:
   - Remove the selected individual members.
   - Remove the selected groups.
   - Remove the selected combination of individual members and groups.
   - Remove the selected members except for members who belong to the space through a group not included in the selection.

The action you confirm or cancel depends on which members or groups you have selected. If you remove a group, CenterStage retains any members of that group who belong to the space independent of the group.

Related topics

- Chapter 17, Space Membership
- Search for members, page 218
- Member and group profile information, page 219

Invite members to a space

Once a space is created, an invitation to join the space gives new or existing members a convenient link for navigating to the space. To send invitations to a space, you must be a space coordinator.

To invite members to a space:

1. Open space **Members** view as described in View space members, page 217.
2. Invite members in one of the following ways:
   - Add space members to a private space, as described in Add members to a private space, page 220 and click **Done** to display the **Invite member(s) to join space** dialog box.
   - Right-click an existing member, or selected multiple members, and then select **Invite** from the shortcut menu. The **Invite member(s) to join space** dialog box appears.
   - Right-click an existing member, or selected multiple members, and then click **Invite** in the toolbar. The **Invite member(s) to join space** dialog box appears
3. Complete the **Invite member(s) to join space** dialog box as follows:

Field	Description/Action
To	The field is populated with newly added or selected members for whom an e-mail address is available. To add members as recipients of your invitation, do the following: 1. Click . 2. In the search field at the top of the **Choose Members** dialog box, type all or part of the member or group name or e-mail address. CenterStage lists all members and groups with names or e-mail addresses that match the characters you type.

Field	Description/Action
	3. Select a member or a group and click **Select**. 4. Click **OK** to validate and return to the **Invite member(s) to join space** dialog box.
Subject	Modify the required subject line, as appropriate. The default subject is defined in space settings.
Message	Modify the rich-text message, as appropriate. The default message is defined in space settings and can include a link to the space to which the recipient is invited.

4. Click **Send Invitation**.

Related topics

- Default invitation text, page 58
- Chapter 17, Space Membership
- Search for members, page 218
- Add members to a private space, page 220

Chapter 18

Permissions and Roles

This section is organized into the following topics:

About member roles — Member roles determine access to content in a space. A role determines the following:

- The actions that members are allowed to perform in a space.
- The rights members have to content in a space.

Standard and custom roles — CenterStage has two standard roles: **Coordinator** and **Participant**, which are described in Standard roles, page 226. Every space member has a standard or custom role. If a member is assigned to multiple roles, the effective permissions are based on the role with the highest permission level.

Space coordinators can manage the security policy for a space by adding custom roles with descriptive names and appropriate permission levels. For example, a space coordinator can create a role called "Template Managers" with permission to create content templates in the space, and then add the appropriate members to that role.

Note: A role can have different permission levels for different items in the space.

Repository permissions — While you cannot see or change the permissions of a repository item, the **Permissions** tab of the **Properties** dialog box shows your personal rights to the item.

Permission levels

There are four permission levels in CenterStage. The permission levels are cumulative—each level allows the rights granted by the lesser ones. The following table describes CenterStage permissions.

<table>
<tr><th>Permission level</th><th>Rights</th></tr>
<tr><td>None (only for the space ACL)</td><td>None: the user cannot see the object</td></tr>
<tr><td>Read</td><td>With appropriate permission for the item, the user can:
View an item (including opening a file for viewing).
See the item versions and version comments.
Open a folder.
Tag or comment on items
The user cannot:
Create items
Paste or move items</td></tr>
<tr><td>Create</td><td>Read + create and open the item, and create comments on the item, but cannot move or delete the content of others</td></tr>
<tr><td>Edit</td><td>Can create and edit items in the space and, except for wikis, blogs, data tables, and discussions, can move items in the space. Can also change lifecycle state.</td></tr>
<tr><td>Delete</td><td>Can edit and delete items for which the user has Delete rights</td></tr>
</table>

Related topics

- Chapter 18, Permissions and Roles
- Standard roles, page 226
- View member permissions, page 228
- Modify permissions settings for roles, page 231
- View or edit item permissions, page 105

Standard roles

The standard CenterStage roles and the activities they signify are described as follows:

Role	Default space permissions	Description
Participant	Edit	Working member of the space. Can import content into the space. When Participants add content, they become owner of that content. They can move content and can create wikis and pages.
Coordinator	Edit + extended Coordinator permissions*	Manages the space, and controls membership and roles: • Add or remove members. • Create or delete custom roles. • Assign members to roles. A coordinator can move and delete items in a space and, provided the coordinator has the appropriate permission level for an item, can do the following: • Add, edit, open items and add comments. • Change the owner for an item. • Change permissions for an item. • Change the lifecycle state of an item. A space can have multiple coordinators.
Content owner	Delete + Change Owner	Owns the page or document. Content owners have Delete rights to the content they add. An item of content can have only one owner at a time.

*Regardless of what CenterStage permission level the Coordinator role has, space coordinators always have the following Documentum permissions:

- *Extended Delete*
- *Change Owner*
- *Change Permissions*

- *Change Location*
- *Change State*
- *Change Folder Links*
- *Browse* (to see an item, even if the role is removed from the permissions for an individual item)

Note: Coordinators do not automatically have permission to create or manage content templates for a space.

For information about Documentum permissions, refer to EMC documentation on Documentum Administrator.

Related topics

- Chapter 18, Permissions and Roles
- Permission levels, page 225
- View member permissions, page 228
- Add custom roles, page 229
- Change member roles, page 230
- Modify permissions settings for roles, page 231
- Delete a custom role, page 232
- View or edit item permissions, page 105

View member permissions

You can view member permissions for a space or for an individual item in a space. You can only view your own permissions for a repository item

To view member permissions:

1. Open the **Permissions** tab for a space or item in a space as follows:
   - If you are a space coordinator, open space settings as described in View or edit space settings, page 53, and then select the **Permissions** tab.
   - If you are either a space coordinator or participant, open the **Properties** dialog box of the item as described in View or edit item properties, page 102, and then select the **Permissions** tab.
2. Click **View Permissions for Any Member**.
3. In the **Member permissions** dialog box, click to search for individual members and groups.
4. In the search field at the top of the **Choose Members** dialog box, type all or part of the member name, group name, or e-mail address.

   CenterStage lists all members and groups with names or e-mail addresses that match the characters you type.
5. Select the member or group and click **OK** to display their permissions.

   The effective member permission is the highest permission level either assigned directly to the member or through the roles a member has in a space.

6. Click **Done**.

Related topics

- Chapter 18, Permissions and Roles
- View or edit item permissions, page 105

Add custom roles

Only a space coordinator can add custom roles to a space and assign members to the new roles.

To add a custom role:

1. Open space settings as described in View or edit space settings, page 53.
2. Select the **Permissions** tab.
3. Click **New Custom Role**.
4. Complete the **Create Custom Role** dialog box as follows:

Field/Control	Action
Name	Specify a role name that is unique among custom role names in the space (for example, Approvers, Authors, or Finance).
Description	The optional description appears with the role name in the Roles panel that opens when you add space members and assign them to roles, and when you change roles for existing space members.
Permission level	Set the permission level for the role.
People in this role can create and manage Wiki, Page, and Data Table templates	Select this checkbox to enable members in this role to create and manage wiki and page templates. See Create a content template, page 244.

5. Click **Create role**.

To add members to the new role, go to the space member list and assign members.

Related topics

- Chapter 18, Permissions and Roles
- Change member roles, page 230
- Modify permissions settings for roles, page 231
- View space members, page 217
- Space permissions, page 56
- View or edit item permissions, page 105

Change member roles

If you change the roles assigned to space members, you also change their permissions. Among space members, only a coordinator can change member roles.

To change member roles:

1. Open space **Members** view as described in View space members, page 217.
2. Do one of the following:
   - Click **Change Role**.
   - Search for or select the members, and then click **Change Role**.

     Note: If you want more information about a selected member before changing their role, you can display their profile by clicking **View** on the page toolbar.
3. Complete the **Change Role** dialog box as follows:

Field/Control	Action
Members	The field is populated with selected members (if any). To add members as follows: 1. Click . 2. In the search field at the top of the **Choose Members** dialog box, type all or part of the member or group name or e-mail address. CenterStage lists all members and groups with names or e-mail addresses that match the characters you type. 3. Select a member or a group and click **Select**. 4. Click **OK**.
Roles	Select the roles you want to assign to the selected members. You can select a standard role and/or one or more custom roles.

4. To assign the selected roles, click **Done**.

Note: You create custom roles in space settings, to which the toolbar in **Members** view includes a link (**Space Settings**).

Related topics

- Chapter 17, Space Membership
- Chapter 18, Permissions and Roles
- Space permissions, page 56

Modify permissions settings for roles

Only a space coordinator can edit the permission settings for a role from any ACL.

To modify permissions:

1. Open the **Permissions** tab for a space or item in a space as follows:
   - If you are a space coordinator, open space settings as described in View or edit space settings, page 53, and then select the **Permissions** tab.
   - If you are either a space coordinator or participant, open the item **Properties** dialog box as described in View or edit item properties, page 102, and then select the **Permissions** tab.
2. On the **Permissions** tab, roles are listed in rows alphabetically. The following controls appear:

Control	Description
	Drag the slider to select the permission level for the role.
	Select to allow members with Read permission to comment on content in this space. The checkbox is blank and disabled for the None permission level, and selected and disabled for permission levels above Read.
	Click to edit settings for all but the Content Owners role. **Note:** This control is only visible to coordinators in space settings.
	Click to delete a role. You can delete any role except Coordinators and Content Owners.

3. To edit settings for a particular role, click  in the row, and complete the **Edit Role** dialog box as follows:

Field/Control	Description/Action
Name	For custom roles only, edit the name so that it is unique among custom role names in the space.
Description	For custom roles only, add or modify text that describes the role. This description appears in the following places: • With the role name in the Roles panel that appears when you assign members to roles. • When you change roles for existing space members. • In tooltip text, when you position the cursor over a role name in a permissions table.

Field/Control	Description/Action
Permission level	Select the permission level that members in this role have for the space or the item.
People in this role can create and manage Wiki, Page, and Data Table templates	When this checkbox is selected, members in this role can create and manage wiki, page, and data table templates. See Create a content template, page 244.

4. Click **Save** to apply the edited settings to the role and return to the **Permissions** tab.

Related topics

- Space permissions, page 56
- Chapter 18, Permissions and Roles

Delete a custom role

Only a space coordinator can remove a custom role.

To delete a custom role:

1. Open space settings as described in View or edit space settings, page 53.
2. Select the **Permissions** tab.

   Roles are listed in rows alphabetically.
3. Click  in the row next to the custom role you want to delete.
4. In the **Delete Custom Role** confirmation dialog box, click **OK** to delete the named custom role from the space permanently.

You can no longer add members to the deleted role, and you cannot add the role to the ACL for an item in the space. Members belonging to the deleted role, and no other role, are removed from the space. Members belonging to the deleted role and to at least one other role remain in the space, but they no longer have the permissions granted by the deleted role.

Related topics

- Space permissions, page 56
- View space members, page 217
- Chapter 18, Permissions and Roles
- View or edit item permissions, page 105

Chapter 19

Versioning

This section is organized into the following topics:

About versioning — With versioning, you can track changes to pages and files, and show what those changes are. You can view a list of versions, open or view one version at a time (view for a page, open for a file), delete a version, and designate a version as the current version.

In addition to files, CenterStage handles versions for the following pages:

- Blog home pages
- Blog posts
- Discussion home pages
- Discussion topic pages
- Wiki home pages
- Wiki pages

Versioning policy — The space versioning policy, as described in Space versioning policy, page 56, determines the following:

- Whether files and pages are versioned by default (if not, saving overwrites the current version).
- Whether members can enable versioning for individual files or pages.
- Whether members can specify version information when they save a version of a file or page.

View version history of a page or file

Versions are available in the **History** view of items that support versioning.

To view the version history for a page or file:

1. Open a file page or an item page, as described in the following topics:
   - View a file page, page 71
   - View a blog, page 163
   - View a blog post, page 165
   - View a wiki, page 153
   - View a wiki page, page 156
   - View a discussion, page 173
   - View a discussion topic, page 175
2. On the file page or item page, open **History** view in either of the following ways:
   - Click the **History** link in the page header.
   - On the item page, select **Show History** from the ***Item* Actions** menu.
   - Click **History of this *Item*** in the page footer.

Related topics

- Chapter 19, Versioning

View a version of a page

To view a version of a page:

1. Open **History** view, as described in View version history of a page or file, page 234.
2. Display **Version** view of a page version by doing one of the following:
   - Select a page version and click **View Version** on the page toolbar.
   - Right-click a page version and select **View Version** from the shortcut menu.
   - Double-click the page version.
   - Follow a link (URL) for a **Version** view, for example by using a bookmark

Version view appears and is the same as regular page view, with the following exceptions:

- Breadcrumbs indicate which version is showing.
- The page title shows the item name preceded by the version number.
- The page cannot be edited.
- The only action available is **Make Current**.

Note: Performing **View Version** on the current version of a page in **History** view is the same as switching to regular page view.

Related topics

- Chapter 19, Versioning
- Make a version current, page 235

View a version of a file

To view a version of a file:

1. Open **History** view, as described in View version history of a page or file, page 234.
2. In **History** view, do one of the following:
   - Select a file version and click **Open Version** on the page toolbar.
   - Right-click a file version and select **Open Version** from the shortcut menu.
   - Double-click a file version.

Related topics

- Chapter 19, Versioning
- Make a version current, page 235

Make a version current

You can designate an older version of a page or file as the current version.

To make a version current:

1. Do one of the following:
   - For a file or a page, open **History** view, as described in View version history of a page or file, page 234.
   - For a page, view a version of a page, as described in View a version of a page, page 234.
2. Make a version the current version, as follows:

For a file	For a page
Do one of the following: • In **History** view, select a file version and click **Make Current** on the page toolbar. • In **History** view, right-click a file version and select **Make Current** from the shortcut menu.	Do one of the following: • In **History** view, select a page version and click **Make Current** on the page toolbar. • In **History** view, right-click a page version and select **Make Current** from the shortcut menu. • In **Version** view, select **Make Current** on the page **Actions** toolbar.

The old version is copied and becomes the current version. Comment threads and attachments, if any, are not copied or altered in any way. If versioning is turned off for the item, the copy replaces the current version. Otherwise, it is added to the list of versions.

Related topics

- Chapter 19, Versioning

Add a new file version

To add a new version of a file, you must have Edit rights to the file. You can either import a new version, or, if you are using the plug-in, add a new version when you edit and save a file. The version options depend on the space versioning policy.

To import a new version of a file:

1. Do one of the following:
   - Right-click a file and select **Import New Version** from the shortcut menu.
   - Open the file page, as described in View a file page, page 71, click **Import New Version** in the page toolbar.
2. In the **Import new version** dialog box, click **Browse**, and then select the file to add as the new version.
3. Add a version note (optional).
4. Depending on the space versioning policy, you might have the option to select the version number (major or minor) for the file.
5. Click **OK** to import the new version.

Note: You can also import new version of a file using **Import File** or, with the plug-in, **Import Files**. If an imported file has the same name as a file in the current location, you can either give the imported file a different name, or make it a new version of the existing file. See Import files, page 77 for more information.

To save a new version of a file by editing it, see Edit a file, page 99.

Related topics

- Chapter 19, Versioning

Add a new page version

You add a new version of a page by editing and saving the page.

To add a new version of a page:

1. Open a page, as described in View an item page, page 126.
2. Edit the page, as described in Edit an item page, page 127.

In edit mode, the **Version Information** area appears below the **Tags** area.

- If versioning is automatic, the version controls are visible but disabled. A new version is added automatically when you save changes to the page.
- If versioning is manual, the version controls are visible and enabled. Select a major or minor version number.
- Type optional **Notes about the new version**.

3. Click **Save**.

Related topics

- Chapter 19, Versioning

View or edit page or file version settings

You view or edit version information for a page or file on the **Version** tab of the item **Properties** dialog box. CenterStage handles versions for the following pages:

- File pages
- Blog home pages
- Blog posts
- Discussion home pages
- Discussion topics
- Wiki home pages
- Wiki pages

The version options available depend the space versioning policy for content in the space. All page and file versions in a space can have version notes. To change version settings, you must have Edit rights to a page or file.

Repository items

For repository documents, no settings are available in CenterStage for versioning policies.

To view or edit version settings for a page or file in a space:

1. Open the **Properties** dialog box for the page or file, as described in View or edit item properties, page 102.
2. Select the **Version** tab.

The space versioning policy determines what the **Version** tab contains.

- If members are not allowed to change the version settings for individual items, the tab displays the following message: **Because versioning has been preset by a space coordinator or because you do not have edit rights, you cannot change the version policy for this content.**
- If members are allowed to change the version settings for individual items, you have the following options:
  - To have CenterStage automatically version the page or file when it is edited, select **Automatically set version strategy** and then select the versioning increment: major or minor.
  - To have CenterStage prompt you for version information after the page or file is edited, select **Manually set version strategy**.
  - To turn off versioning for the page file, select **Items are not versioned (overwrite the current version)**.

3. In the **Version Note** field, edit or type an optional note for the current version of the page or file.
4. Click **OK**.

Related topics

- Chapter 19, Versioning
- Space versioning policy, page 56

Delete a version

In order to delete one or more versions of the item, you must have Delete permission on one or more versions of a file or page in a space.

To delete a version:

1. Open **History** view, as described in View version history of a page or file, page 234.
2. Select one or more versions and do one of the following:
   - Select **More > Delete** in the toolbar.
   - Right-click and select **Delete** from the shortcut menu.
3. To confirm the deletion, click **Yes** in response to the prompt.

The results of deleting one or more versions are as follows:

- Deleting one or more specific versions does not delete attachments to a page.
- One set of tags applies to all versions of an item. If any version of the item is deleted, the complete set of tags are retained for the remaining version or versions.
- Deleting all versions of a file or page deletes all versions of attachments to the page and all widgets on the page.

Related topics

- Chapter 19, Versioning

Chapter 20

Templates

This section is organized into the following topics:

About templates — The following types of templates are available in CenterStage:

Template type	Description
Space templates (site-wide)	For creating new spaces
Content templates (site-wide or space-specific)	• For creating new wikis • For creating new wiki pages • For creating new data tables

When active, templates are available for creating new spaces or content in a space.

Create and manage templates — System administrators can create and manage all types of templates, at the space and the site level. Otherwise, to create and manage space templates, a user must be in the **dmc_kw_manage_space_templates** role in the repository (set by an administrator using Documentum Administrator).

Repository items — You cannot save repository items as CenterStage templates.

Create a space template

To create a space template, you must have the **dmc_kw_manage_space_templates** role in the repository (set by an administrator using Documentum Administrator).

Note: Space coordinators do not automatically have permission to create or manage space templates.

To create a space template:

1. Open the space that you want to save as a template.
2. Right-click the space tab and select **Save as Space Template** from the shortcut menu.
3. Complete the **Save as Space Template** dialog box, as appropriate. See Space template properties, page 243.
4. Click **Save template**.

A space template is created from the existing space. The new template copies the following from the original item:

- Icon (the template creator can change this)
- Content policy
- Default notification and invitation messages
- Custom roles
- Wiki and page templates scoped to the space
- Current version of all items in the space to which the template creator has access, including:
  — Property values
  — Current versions of their attachments
  — Space tags (the template creator can choose whether or not to keep tags)
  — Custom permissions (custom roles only, not named members)

For data tables in the space, the new template copies the following:

- Default values in the schema
- Properties values
- Current version of attachments
- Space tags (optionally)
- Custom permissions
- Lifecycles

The new template does not copy the following from the original item:

- Property values from the original space
- Space membership
- Thumbnails (they are regenerated in spaces created from the template)
- Comments on content
- Custom versioning on content (version policies are reset to the space policy)
- Lock state, edit state, and any content that has been created, but not yet saved

Note: A space template can only include files up to 5 MB in size. If you create a template from a space containing any files larger than 5 MB, those files are omitted from the resulting space template.

Related topics

- View or edit space settings, page 53
- Space template properties, page 243
- Manage space templates, page 244

Space template properties

When creating a space template or changing its properties, specify space template properties as follows:

Field	Action
Template name (required)	Type a name that is unique in the site.
Description	Type an optional description for the template to appear in the template selector when you create a space.
Category	Select an existing category, or add a new category. The new category is added to the list of space template categories and available for other space creators, and for other space template creators.
Icon	Select an icon for the template.
Keep the tags on content saved in the template	• Select the checkbox (default) to save tags. Content included in a new space created from this template will initially have the same tags they had in the original space. • Clear the checkbox to discard tags. Content included in a new space created from this template will initially have no tags.
This template is active	• When active, the template is available for creating new spaces in the site. • When inactive, the template is unavailable for creating new spaces in the site.

Related topics

- Chapter 20, Templates
- Create a space template, page 241
- Change the properties of a space template, page 244

Manage space templates

Space templates are managed in the site-wide templates area. To manage space templates for a site, you must have the **dmc_kw_manage_space_templates** role in the repository (set by an administrator using Documentum Administrator).

To manage space templates, click **Templates** in the top CenterStage toolbar.

In the site-wide templates area, you can copy, paste, rename, delete, and access properties for space templates. To edit a space template, create an instance of the space template, modify it, and then save the space as a template.

Related topics

- Chapter 20, Templates
- Create a space template, page 241
- Space template properties, page 243
- Change the properties of a space template, page 244
- Organize templates, page 248

Change the properties of a space template

To change the properties of a space template:

1. Click **Templates** in the top CenterStage toolbar.
   The list of site templates appears.
2. Right-click the template and select **Template Properties**, or select the template and select **More** > **Template Properties**.
3. Modify the template **Properties** dialog box.

Related topics

- Chapter 20, Templates
- Create a space template, page 241
- Space template properties, page 243

Create a content template

To create and manage content templates for a particular space, your CenterStage role must allow creation and management of wiki, wiki page, and data table templates (see Modify permissions settings for roles, page 231).

Note: Coordinators do not automatically have permission to create or manage content templates for a space. See Create a content template, page 244.

To create a content template:

1. Open the wiki, page, or data table that you want to save as a template.
2. Select **Save as *Item* Template** from the ***Item* Actions** menu.
3. Complete the **Save as Template** dialog box as appropriate. See Content template properties, page 245.
4. Click **Save template**.

A template is created from the existing content. The new template copies the following from the original content:

- Current version of all attachments to which you have access
- Current version of pages in the wiki (for a wiki only; a data table template does not contain copies of the original entries)

For a data table template, the new template also copies the following:

- Default values in the schema
- Properties values
- Current version of attachments to which you have access

The new template does not copy the following from the original content:

- Permissions
- Property values
- Comments
- Custom versioning policies (version policies are reset to the space policy)
- Tags
- Lock or edit state
- Lifecycle

Related topics

- Chapter 20, Templates
- Content template properties, page 245
- Manage content templates, page 246

Content template properties

When creating a content template (for a wiki, page, or data table) or changing its properties, content template properties are as follows:

Field	Action
Template name (required)	Type a name that is unique in the selected scope (site or space).

Field	Action
Description	Type an optional description for the template to appear in the template selector when you create an item of this type.
Category	Select an existing category, or add a new category. The new category is added to the list of content template categories and available for other content creators, as well as for other content template creators.
The layout of wikis [or pages] created from this template can be changed. (does not apply to data tables because their layout cannot be changed)	• Select the checkbox to allow layout changes. • Clear the checkbox to prevent layout changes.
This template is active	• If active, the template is available for creating new content in the site. • If inactive, the template is unavailable for creating new content in the site.
Make this template available to all spaces in the site (visible to system administrators only)	Decide whether the template is available or unavailable (the default) for creating new content in any space in the site. **Note:** This change is one way and cannot be reverted once the scope of a template becomes site-wide.

Related topics

- Chapter 20, Templates
- Create a content template, page 244

Manage content templates

To manage content templates (wikis, pages, and data tables) for a particular space, your CenterStage role in that space must allow you to create and manage content templates (see Add custom roles, page 229).

To manage content templates for a site, first change the scope of a space-wide content template to a site-wide template, as described in Share a content template across all spaces, page 247. Only system administrators can manage content templates for a site.

Open the content template management area by doing one of the following:

- For space-specific content templates, open **Templates** view of the space by clicking in the view panel of the space tab.
- For site-wide content templates, click **Templates** in the top CenterStage toolbar and, if you are a system administrator, select **Content Templates** as the **Template Type**.

In the space-wide and site-wide templates areas, you can copy, paste, rename, delete, and access properties for wiki and page templates. To edit a content template, you must create an instance of the wiki or page template, change the item, and then save the item as a template.

Related topics

- Content template properties, page 245
- Change the properties of a content template, page 247
- Organize templates, page 248

Change the properties of a content template

To change the properties of a content template:

1. Do one of the following:
   - Open the space-specific **Templates** view by clicking in the space view panel.
   - Open the site-wide templates area by clicking **Templates** in the top CenterStage toolbar.
2. Right-click the template and select **Template Properties**, or select the template, then **More** > **Template Properties**.

   The template **Properties** dialog box opens.
3. Modify properties as appropriate.

Related topics

- Content template properties, page 245
- Share a content template across all spaces, page 247
- Organize templates, page 248

Share a content template across all spaces

Only a system administrator can modify the scope of a wiki or page template so that it is shared across all spaces.

To modify the scope of a content template:

1. Open space **Templates** view by clicking in the view panel of the space tab.
2. For **Template Type**, select **Wiki templates**, **Page templates**, or **Data table templates**.
3. Right-click the template and select **Template Properties**, or select the template and select **More** > **Template Properties**.
4. In the **Settings** tab of the template **Properties** dialog box, select the checkbox labeled **Make this template available to all spaces in the site**.

Note: This change is one way and cannot be reverted once the scope of a template becomes site-wide.

Related topics

- Chapter 20, Templates
- Manage content templates, page 246

Organize templates

Actions for organizing templates include copying, deleting, renaming, activating, or deactivating templates. You organize templates in a reserved area for either space-specific or site-wide templates.

To organize templates:

1. Do one of the following to open a templates area:
   - For space-wide templates, click in the view panel of a space tab.
   - For site-wide templates, click **Templates** in the top CenterStage toolbar.
2. Select the **Template Type**.
3. Perform one of the following actions:

Action	Steps
Copy	1. Select one or more templates. 2. Right-click and select **Copy**, or select **More >** **Copy**. 3. Select **More >** **Paste**.
Delete	1. Select one or more templates. 2. Do one of the following: • Right-click a template and select **Delete**. • Select a template and select **More >** **Delete**.
Rename	1. Right-click the template and select **Rename**, or select the template and then select **More >** **Rename**. 2. Type a new name for the template.

Action	Steps
Activate an inactive template	1. Right-click a template and select **Template Properties**, or select a template and select **More >** **Template Properties**. 2. In the second tab of the **Properties** dialog box, select **This template is active**.
Deactivate an active template	1. Right-click a template and select **Template Properties**, or select a template and select **More >** **Template Properties**. 2. In the second tab of the **Properties** dialog box, clear **This template is active**.

Chapter 21

Lifecycles

A lifecycle is a sequence of states a file goes through, such as an approval process. You cannot attach, detach, suspend, or resume lifecycles in CenterStage. However, if a lifecycle is attached to a CenterStage item through another user interface (or with a programming interface), you can use  **Lifecycle** commands on the **More** menu (or the shortcut menu) to **Promote to** the next state in the lifecycle or **Return to** the previous state.

Index

E

F

G

H

I

L

M

W