

Oracle Content & Experience Cloud Service

Workshop

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## Demo Attributes

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## Oracle Content & Experience Cloud Service

Oracle Content & Experience Cloud Service (CEC) is a cloud-based content hub that lets you manage your content and digital assets wherever you are, keeping all your files at your fingertips at home, in the office, at the airport, or in a hotel halfway across the world. Easy-to-use collaboration and workflow management help streamline the creation and delivery of your content to improve both customer and employee engagement.

Overview

**End-to-End Application Flow**

This demo showcases the end to end flow of managing a file document including the following:

* Create a folder and importing file
* Synchronize a folder with a desktop application
* Reserve and modify a file
* Collaborate and communicate using Social Features
* Share files internally and externally

| **S.No.** | **Action** | **Description** |
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| Chapter 1: Upload and Share a file in Oracle CEC | | |
| 1.00 | In this chapter of the workshop we are going to show how to use Oracle CEC via a web browser and how to upload a file into a folder and share it afterwards | |
| 1.01 | FOLLOW THE LINK IN YOUR ACCESS DOCUMENT  At the Login Prompt enter the user name and password that has been supplied to you. |  |

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| 1.02 | Welcome to the main page of CEC. You’ll notice on the left-hand menu all features available depending on your role.  For the moment we will have a look at the Content part of CEC.  Now we are going to create a new folder and upload a file into that folder   1. **Click** on Create on the right upper corner   **NOTE: Depending on the CEC instance you might see already existing folders and content.** |  |
| 1.03 | 1. A new window will pop up. In this window you can enter  * Name of the new folder * Write a description * **Click** on Create   When the new folder is created, you can access it by **clicking** on it |  |
| 1.04 | When you are in the folder you will see it is empty.  We can now start adding documents to it.   1. **Click** on Upload – a new window will pop up |  |
| 1.05 | 1. **Select** a file in the new window and **click** on Open **or double click** the file to start the upload.   You will see the message keeping you updated as the upload progresses.  **Click** on the Details button to open a more detailed view about the upload process. When you are done, close this window | **Note:** When the uploading process is complete, a message will notice you if the upload was successful or not. |
| 1.06 | One of the great advantages of Oracle Content & Experience Cloud is its ability to share folders with your colleagues or customers.  Now we are going to share the created folder.   1. **Click** on Documents to go back to the main directory. 2. **Right-Click** on your folder and **click** on **Members** or **Select** the folder by clicking on it’s **checkbox**. Then select MEMBERS from the top menu.   **Note: If you don’t see the MEMBERS option on the top – click on the MORE to show all of the actions.** |  |
| 1.07 | 1. **Click** on **Add Members** in the new window.   **Note: There are two other ways of sharing a file or a folder which we will discuss later during this workshop** |  |
| 1.08 | 1. Select a member from an available member list or type in their email address. |  |
| 1.09 | 1. **Click** on the drop-down arrow and choose one of the four possible roles that a member can have   *Viewer:* These members can view files and folders online  *Downloader:* These members can view and download files and folders  *Contributor:* These members can view, download, and modify files and folders  *Manager:* These members can modify files and manage people who can access this folder |  |
| 1.10 | 1. When done, **click** on Add |  |
| 1.11 | The summarization window shows all member of this shared folder including their role (access rights).  More member can be added here.   1. **Click** on Done |  |
| 1.12 | CEC also supports drag and drop file uploads.   1. Open your file browser and **drag/drop** a file into your folder. |  |

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| Chapter 2: Conversations, Editing and other collaboration features | | |
| 2.00 | In this chapter of the workshop we are going to show some of the collaboration features of CEC | |
| 2.01 | 1. Go into your created folder and **click** on the sample document to open it. |  |
| 2.02 | 1. **Click** on the **3 dots** in the right upper corner. |  |
| 2.03 | 1. Write some text for the conversation and **click** on Post. 2. **Click** on the **3 dots** again to hide the conversation. |  |

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| 2.04 | Add an anotation to your document :   1. **Click** on the **Pin Button** |  |
| 2.05 | 1. Click where you want to add an anotation in your document |  |
| 2.06 | 1. A yellow box will appear in the conversation section. 2. Add a Comment 3. Click on ‘Post’ |  |
| 2.07 | 1. Your annotation is now effective.   Everytime you click on your Pin, you will be automatically redirected to the corresponding comment.  This will allow you to track changes, and point out specific parts of a document when collaborating with other team members. |  |
| 2.08 | 1. Go back to your folder and **right click** on the sample document.  *Or Select the documents Check Box.* 2. **Click** on Reserve to lock your file. The file is now locked |  |

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| 2.09 | 1. **Right click** on your file and **click** Download to change the content of your file. *Or select your file and click on ‘Download’ in the menu bar.* 2. Save your file on your Desktpop and open it in Word. |  |
| 2.10 | 1. In Word, write some new text into your document and then **save** the file. |  |
| 2.11 | **Note** Optional Step :  If you don’t have the Windows application installed  Go back to your folder in the web browser.  Right click on your file,  Select Upload New Version  Upload your file |  |
| 2.12 | You will see that there is a new version saved   1. **Right click** on your document and **click** on Clear Reservation to unlock your file |  |
| 2.13 | 1. **Click** the More button and then **click** on Version History   A new window will appear where you will see when and from whom the document was changed.  In this window you can download the latest or a previous version, delete them or make a previous version to the latest.  It is also possible to click on the file name to open any version within the browser.   1. **Click** on Done to close this window. |  |
| 2.14 | 1. Back in your folder, click on the **Share** button. A new window will appear. |  |
| 2.15 | In a previous step, we have added a new member for collaboration to this document  There are two other ways of sharing.  **1.** You can send a link to a member who is part of the CEC instance.  **2.** You can create a public link to send to anyone by selecting **Public** |  |
| 2.16 | You can modify the properties of the Public Link by selecting **Edit Link Options.**  When you enter an email address in the **To** field, you’ll notice that the **CopyLink** button will change into a **SendLink** button | **Note:** For a public link you can give a specific name to the link. Also it is possible to configure different properties like permissions, expiration date or a password |
| 2.17 | 1. **Click** on **CopyLink.**   The **Share Link** dialog will disappear and the link will be copied to your clipboard. |  |
| 2.18 | Go back to your folder and **click** on the conversation icon. |  |
| 2.19 | Write a message to the file conversation and **click** on Post. |  |

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| 2.20 | Using Document Cloud service, you can manage custom properties so that users can quickly categorize files and folders with additional descriptions.  It is known as Metadata.   1. Click on the 3 dots on the outer right menu side 2. When the ‘Conversation’ pane opes, select **Custom Properties** from the Drop down menu. |  |
| 2.21 | Teh pabne changes to display available ‘Custom Properties’.  We need to set up custom properties for this document.   1. Click on the ‘wheel’ to open the‘Manage Custom Properties’ dialog. |  |
| 2.22 | The CEC Administrator has the possibility to create as many custom properties as needed.  Your environment has been already configured with custom set of properties.   1. Flipp the switch next to DOCUMENT APPROVAL and press SAVE. |  |
| **N**  **O**  **T**  **E** | **Note:** You can customise a custom properties in Doc Settings. You need Admin rights for this.  You will be able to decide the number of fields, the type and other information.  **We are showing an example in our screen shot.** |  |
| 2.23 | Now fill your fields on customer metadata.   1. Click **Save**. |  |

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| Chapter 3: The Desktop Application | | |
| 3.00 | In this chapter of the workshop we are going to show the desktop application and its integration with the cloud.  The desktop app keeps files and folders on your computer desktop synchronized with your files and folders in the cloud.  It's easy to do. Just install the client software. You set up an account and the software will set up a folder for you on your desktop, with the name you give the folder. You can choose the folders you want to sync, and they’re put into that desktop folder to be synced whenever the app starts. You can also directly add files and folders into your desktop folder and they’ll be added to Oracle Content & Experience Cloud Service. They’re available to use in your browser or a mobile device. All your information stays up-to-date while the sync client is running.  You can also set notifications, letting you know when the conversations you’re active in are changed. You can customize what notifications you’ll receive so you can follow only those conversations that are important to you. You can also share your files and folders, just like you do when you use a web browser. | |
| 3.01 | One way of downloading the desktop application is to click on your account name and then click on Download Apps  Select he version you want to download and install it |  |
| 3.02 |  | **Note:** The CEC application is integrated with your Windows file browser. You can choose the folders you want to sync, and they’re put into that desktop folder to be synced whenever the app starts. You can also directly add files and folders into your desktop folder and they’ll be added to Oracle Content & Experience Cloud Service. |
| 3.03 |  | **Note:** All your information stays up-to-date while the sync client is running. |
| 3.04 |  | **Note:** You can also set notifications, letting you know when the conversations you’re active in are changed. You can customize what notifications you’ll receive so you can follow only those conversations that are important to you. You can also share your files and folders, just like you do when you use a web browser. |