Getting Started with LiveCycle® Contentspace ES2

Adobe® LiveCycle® Content Services ES2

November 2009

Version 9

Adobe® LiveCycle® Content Services ES2 (9.0) Getting Started with LiveCycle Contentspace ES2 for Microsoft® Windows®, Linux®, and UNIX®
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1. Getting started with LiveCycle Contentspace ES2

Adobe® LiveCycle® Contentspace ES2 provides user access to an integrated set of content services ranging from enterprise content repository to forums and discussions.

Using LiveCycle Contentspace ES2, users can store content, browse and search for stored content items, perform various actions on content, and participate in content-driven processes. All content can be managed through library services such as versioning, check-in/checkout, and rights management.

About this tutorial

This tutorial explains how to use the basic functionality of LiveCycle Contentspace ES2, including the following topics:

- Understanding the LiveCycle Contentspace ES2 interface
- Creating spaces and content
- Building smart spaces
- Collaborating with other users
- Generating PDF files and image files
- Reviewing and approving content
- Categorizing content
- Using forums and discussions

Who should read this tutorial?

This tutorial is intended for new users who want help when starting to use LiveCycle Contentspace ES2.

Additional information

The resources in this table can help you learn more about Adobe LiveCycle ES2.

For information about	See
LiveCycle Contentspace ES2 features	*LiveCycle Contentspace ES2 Help*
Other services and products that integrate with LiveCycle ES2	www.adobe.com
Patch updates, technical notes, and additional information on this product version	LiveCycle Technical Support

2. Using LiveCycle Contentspace ES2

You must log in to LiveCycle Contentspace ES2 to open the web pages and familiarize yourself with Contentspace ES2.

To log in to the web pages using a browser, you need the LiveCycle Contentspace ES2 URL and a LiveCycle ES2 account. See your administrator if you do not have the necessary information.

Log in

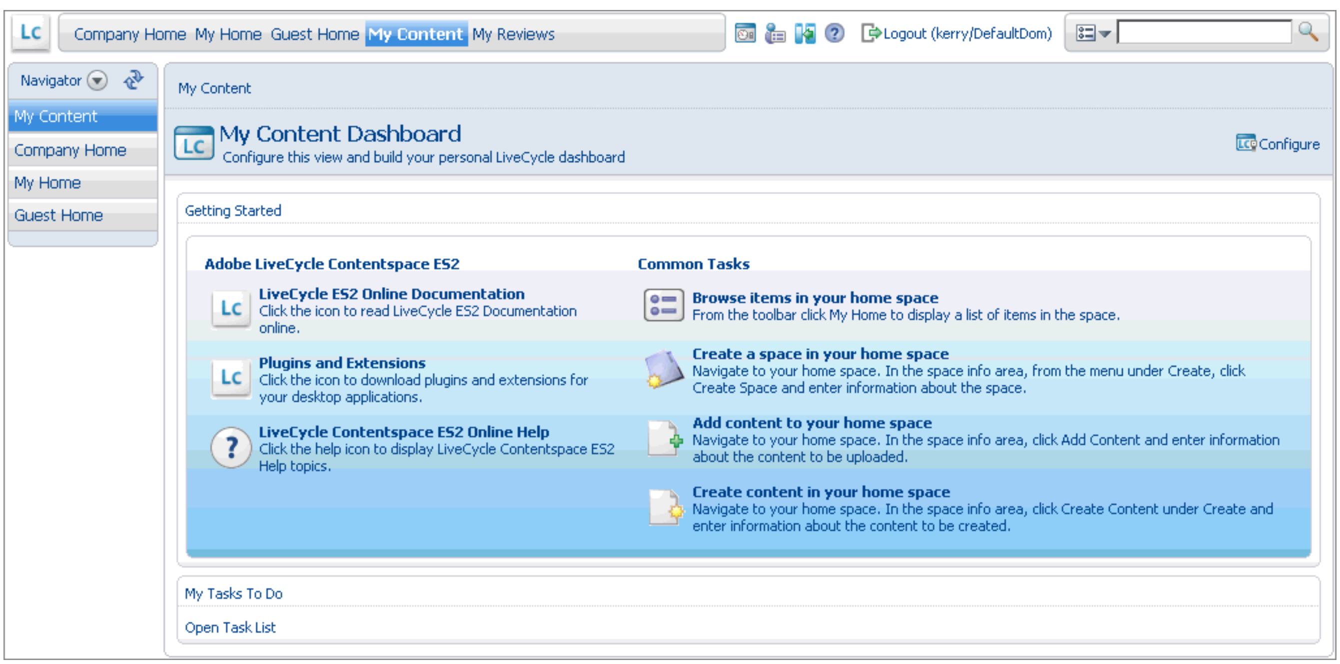
1 Type the Contentspace ES2 URL in your browser:

`http://[server_name]:[port_number]/contentspace`

2 In the login window, type your user name and password and click **OK**.

Understanding the LiveCycle Contentspace ES2 interface

When you log in to LiveCycle Contentspace ES2, the My Content Dashboard space appears. This space holds content that is available to all users.



The Contentspace ES2 user interface has three main areas:

- Toolbar along the top of the screen
- Sidebar at the left of the screen
- Work area - the remainder of the screen

Toolbar

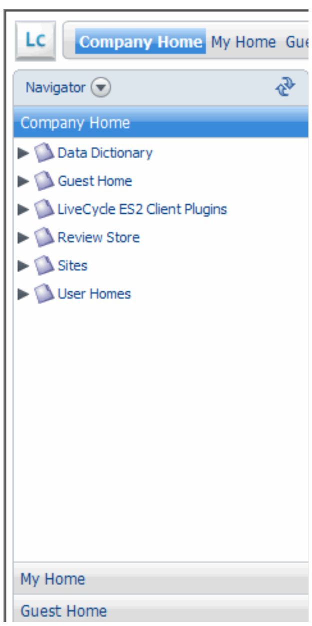
The toolbar contains navigation buttons, which you use to perform several actions.

From the toolbar, you can do the following actions:

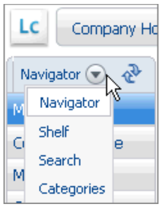
- Click the **LiveCycle ES2** icon to view information about LiveCycle Content Services ES2.
- Navigate to My Home, Company Home, or My Content Dashboard.
- Click **User Options** to set user options.
- Click **Hide or Show the Sidebar** to hide and show the sidebar.
- Access the Help and Search features.
- Log out
- If you are an administrator, you can also click **Administration Console** to open the Contentspace ES2 administration console. This button is visible only to administrators.

Sidebar

The sidebar contains various features to help you navigate, find, and work with content.



Clicking the Navigator button reveals additional options for you to work with. This includes using the Shelf, where you can view the Clipboard, Shortcuts, and Recent Spaces, Searching, and browsing Categories.



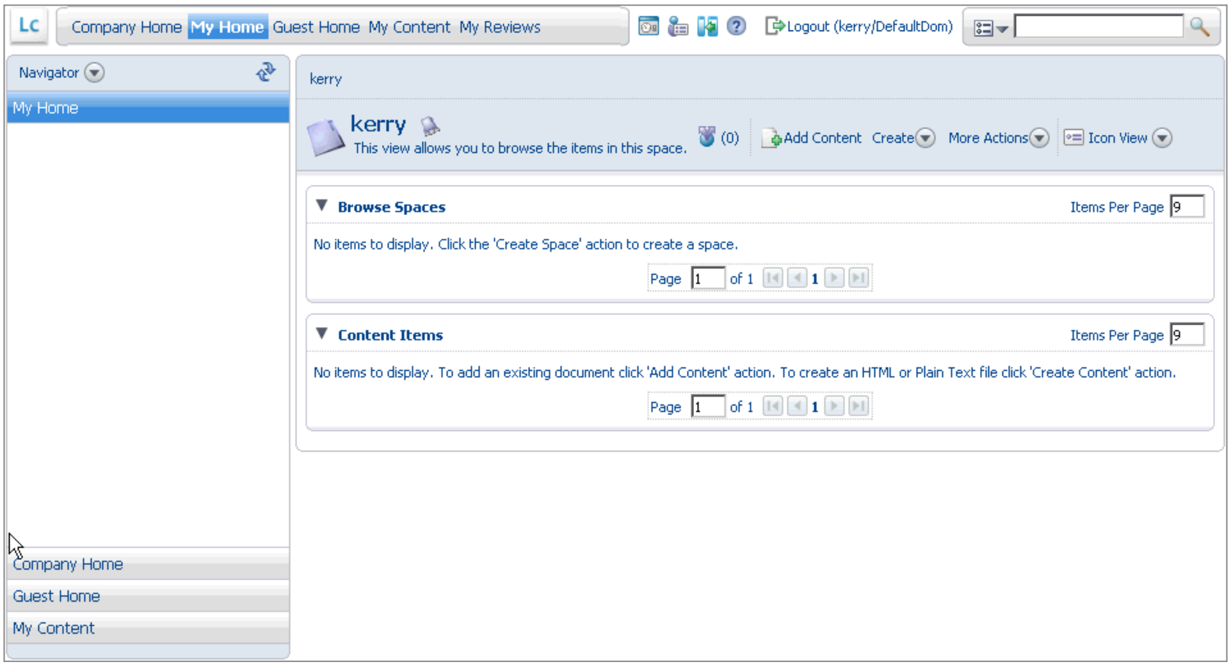
Work area

The *work area* is a dynamic area that displays items that are relevant to the task you are performing.

The work area changes, depending on the information you are looking at or the task you are performing. The top of the work area always displays a navigation breadcrumb trail that allows you to jump to any part of the trail. For information views, a summary area is available, along with actions or alternative views. The details and options change, depending on the area you are viewing, the task(s) you are performing, and your role.

3. Creating spaces and content

In your home space, you can add and create content items and create subspaces. First, navigate to your home space by clicking My Home in the sidebar or toolbar.

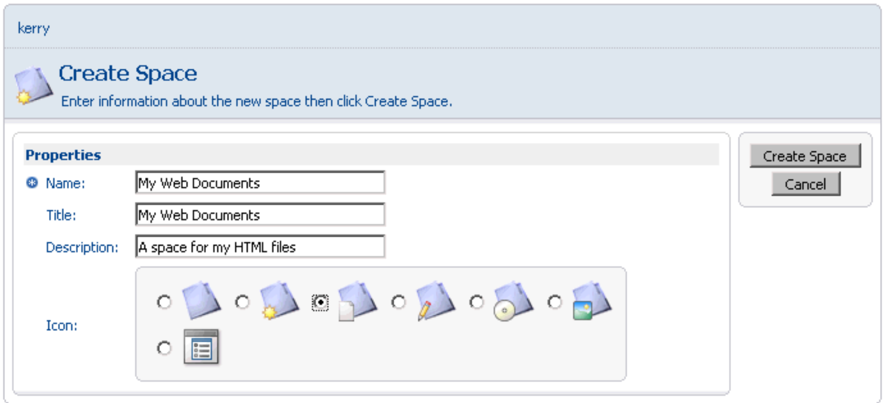


Create a space

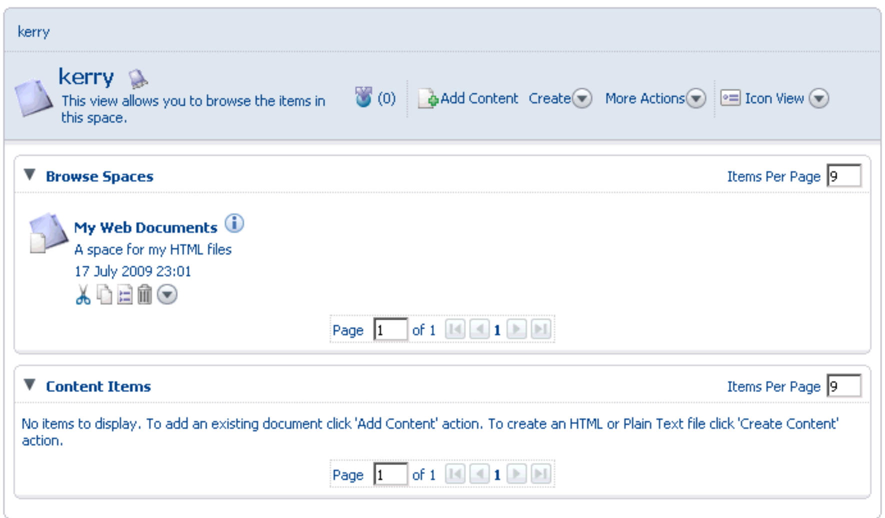
Before you add content, you can organize your home space to meet your business needs. Create a space called *My Web Documents* for HTML files.

1. In the header, click **Create** and select **Create Space** from the list.
2. Type `My Web Documents` as the space name.
3. (Optional) Specify a title and description.

4 Select an icon to represent the type of content you intend to put in the space, and then click **Create Space**.



Your home space appears with the new space displayed, as shown in this screen shot.



5 To synchronize the navigator bar and display your new space under My Home, on the Navigator header in the sidebar, click **Refresh** .

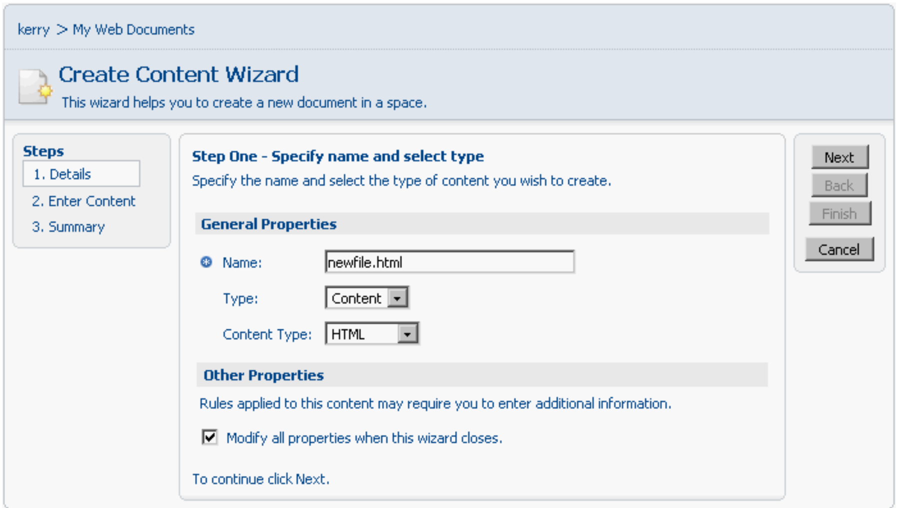
Create content in a space

Now, you will create content in the new space by using the Create Content wizard.

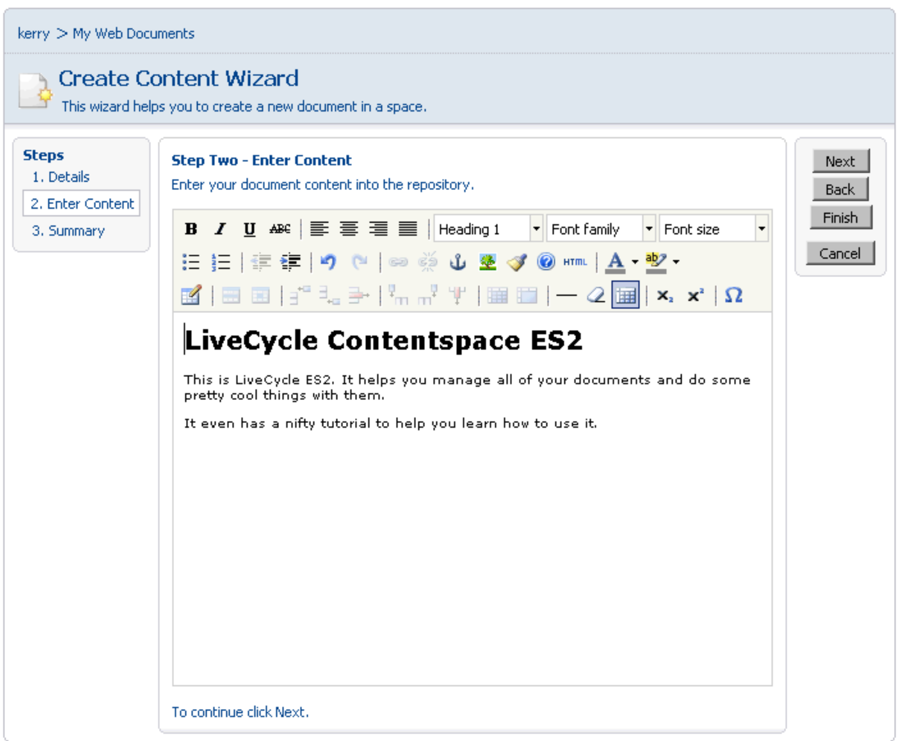
1 In the Browse Spaces panel, click **My Web Documents** to open the space.

2 In the header, click **Create** > **Create Content**. The Create Content Wizard appears.

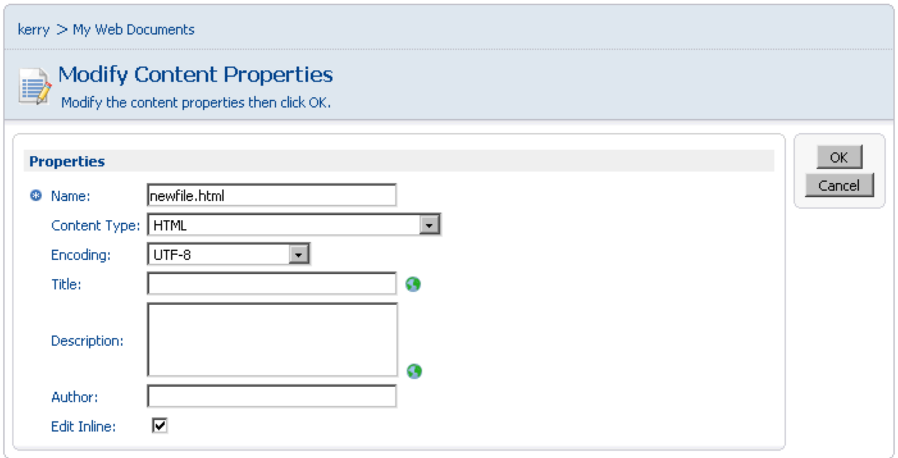
3 Type `newfile.html` as the file name, keep the remaining properties as they are, and click **Next**.



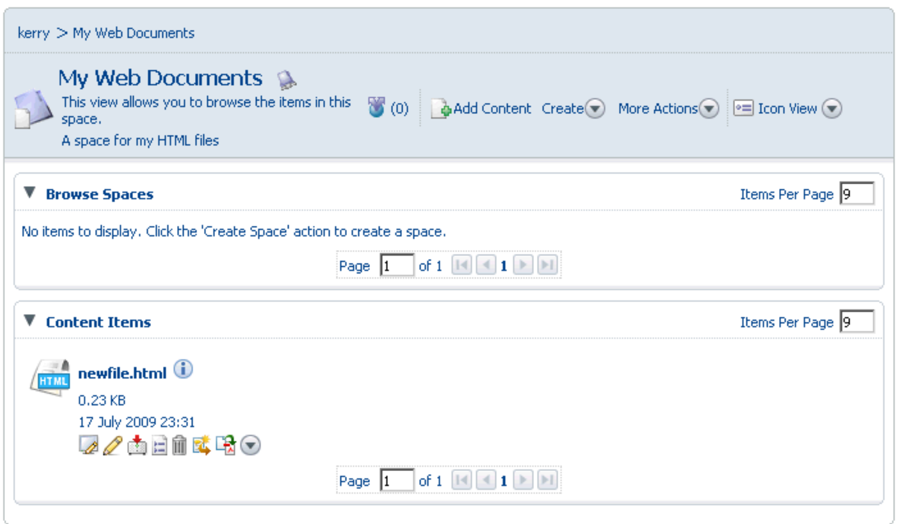
4 Complete the following example web page, or type any text, and then click **Next**.



5 Click **Finish**. The Modify Content Properties page displays the full set of properties for the document you created. The properties vary for different content types.



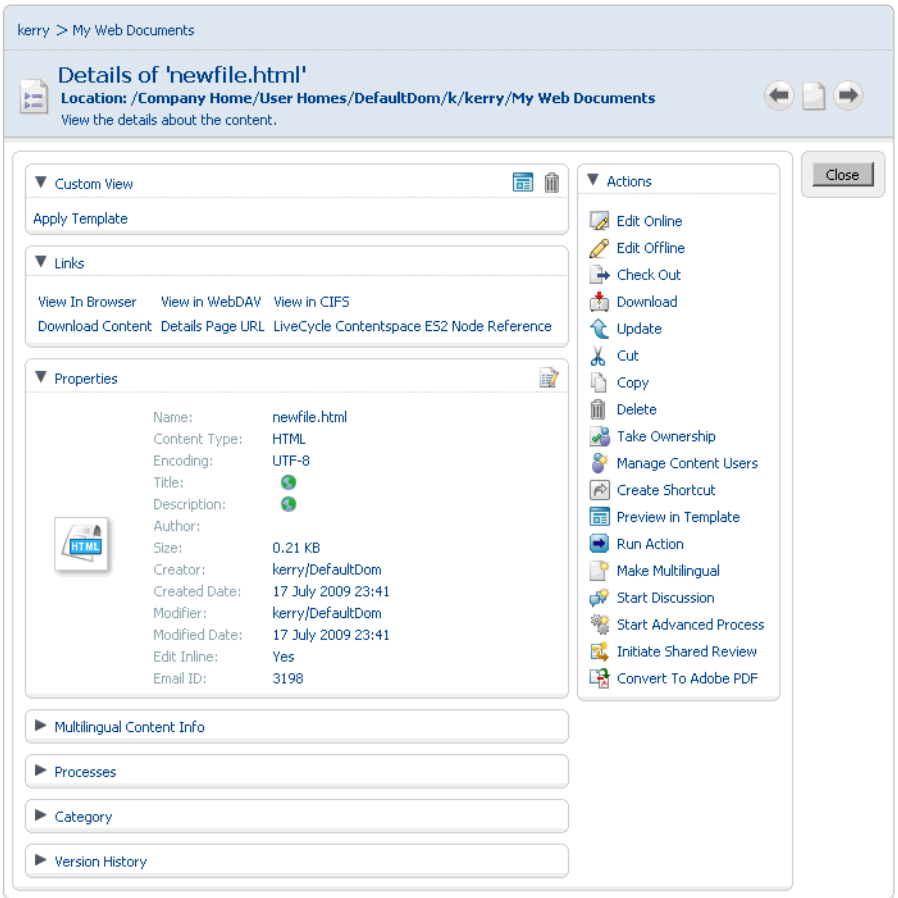
6 Review the properties and click **OK**. The new file is listed in the Content Items panel.



Manage content item details

You can view the details (properties and metadata) about a content item at any time.

1 Click **View Details** for the content item to display the Details page.



2 [Optional] Perform any of these tasks from the Details page:

- In the Actions panel on the right, click any of the options to perform that content action.
- In the upper-right corner of the Properties panel, click **Modify** to edit the content properties.
- Click the file icon to open the file or download it through the browser.

3 Click **Close**.

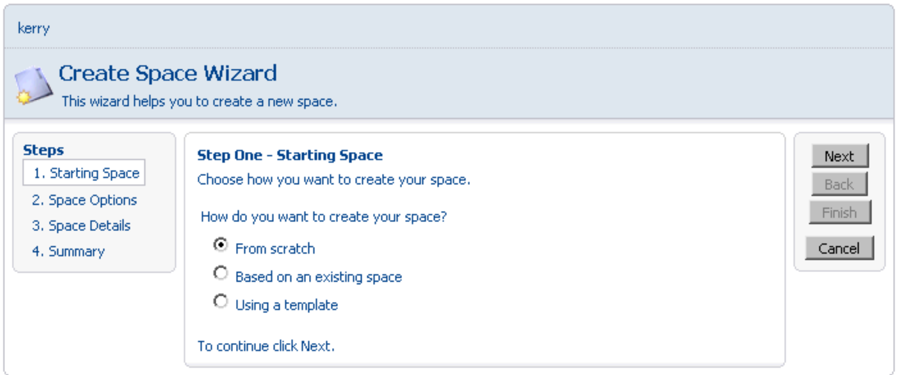
Create a space using a space template

You can use a space template to accelerate the setup of a space and to ensure consistency across multiple spaces.

You will set up a project space with multiple subspaces that you can use to collaborate with other team members to create, approve, and publish documents. Part of the requirements that you have for this space are provided by a space template.

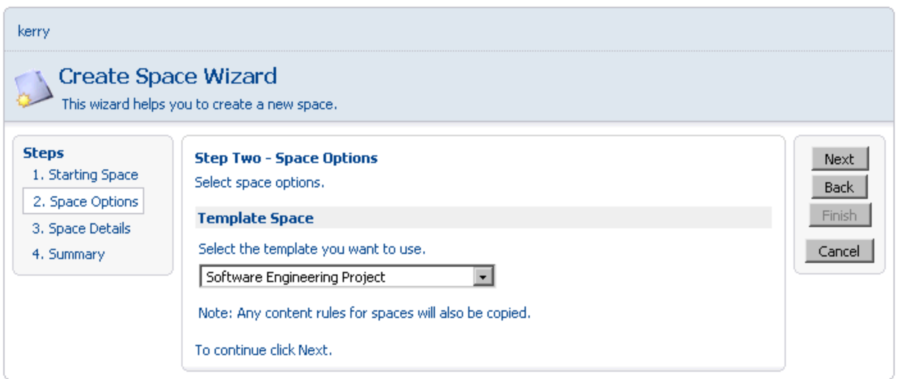
1 In the toolbar or sidebar, click **My Home** to navigate to your home space.

2 In the header, click **Create** > **Advanced Space Wizard**. The Create Space Wizard page appears.

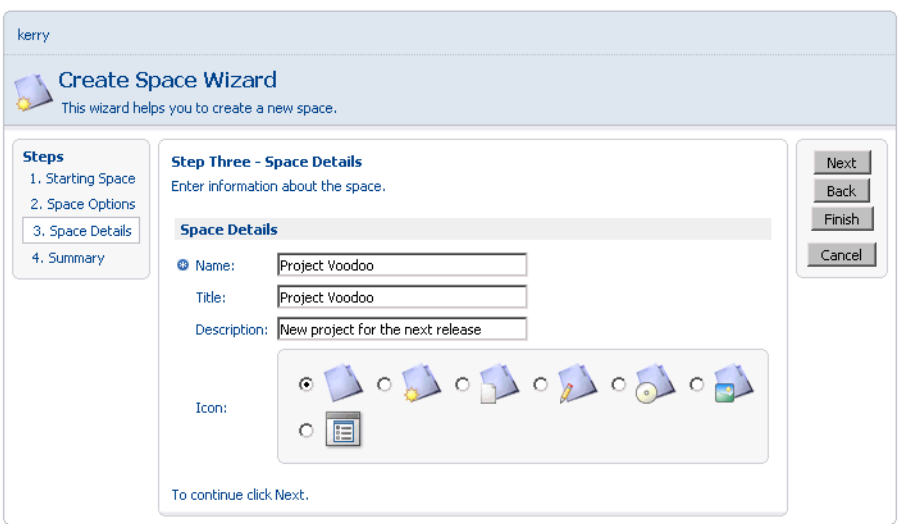


3 Select **Using a template** and click **Next**.

4 Under Template Space, select **Software Engineering Project** from the list and click **Next**.



5 In the **Name** box, type `Project Voodoo`, specify a title and description, and then select an icon.



6 Click **Finish**. Your My Home space appears where the Project Voodoo space is created.

4. Building smart spaces

One of the key benefits of LiveCycle Contentspace ES2 is the ability to define content rules that affect content within a space. These content rules can be used to provide creative solutions to automation and management of content. Content rules are applied when content moves in or out of a space and may also apply to content that is directly in the space or in subspaces.

A content rule consists of three main elements:

- The conditions on the content for the content rule to match
- The content actions that are performed on the content
- The type of content rule it is. Any number of conditions and content actions can be defined in a content rule.

Creating content rules

In this task, you will create content rules within a space. You will create a few content rules in the Project Voodoo Documentation space to automatically perform these tasks:

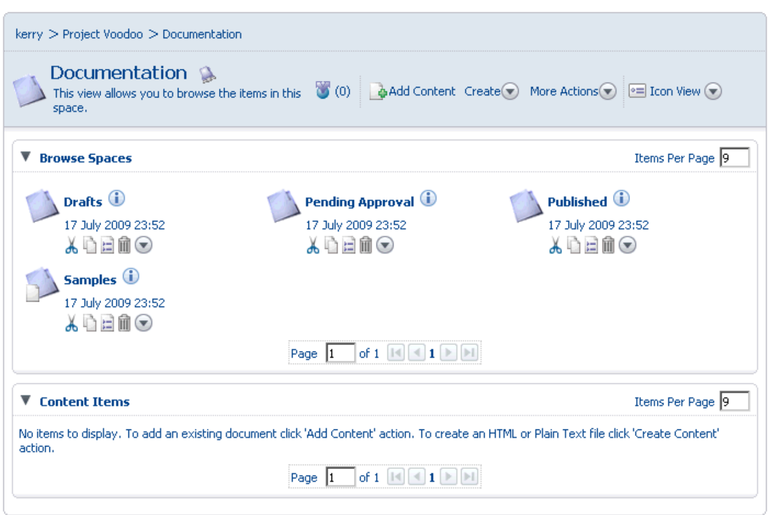
- Add content versioning to keep track of different versions. Versioning is a good idea when multiple authors will collaborate on the documents.
- Set up a simple process that allows the documents to progress through these spaces.

First, you will create the versioning content rule.

Add a versioning content rule

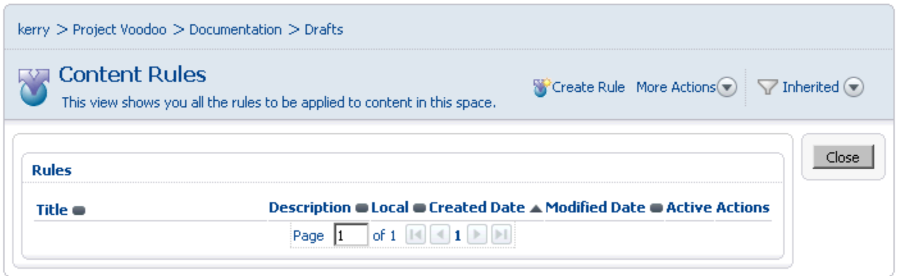
You will use the Create Rule wizard to add a versioning content rule for the content. Versioning keeps track of each version of a content item as it is updated.

1 In the toolbar, click **Project Voodoo** to open the space and click **Documentation** to open the subspace. This space has three subspaces for documents in different stages of completion and a space for sample content.

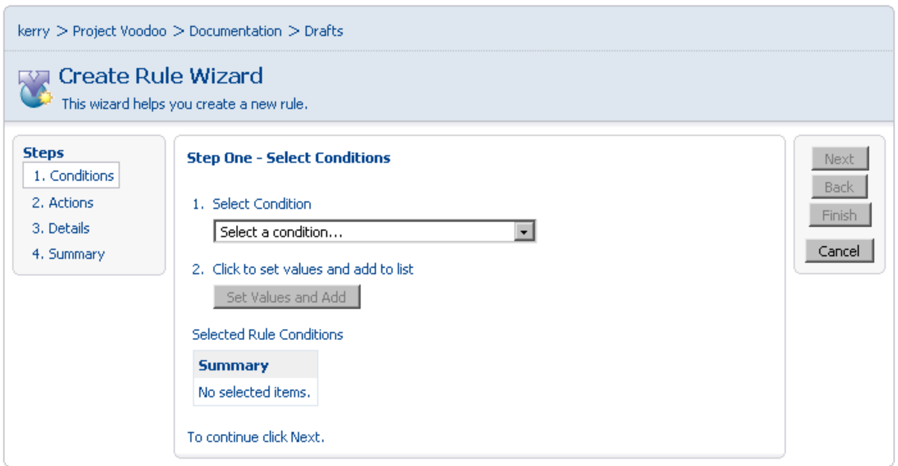


2 In the Browse Spaces panel, click **Drafts** to open the Drafts space where new documents will be created for the project.

3 In the header, click **More Actions** > **Manage Content Rules**.

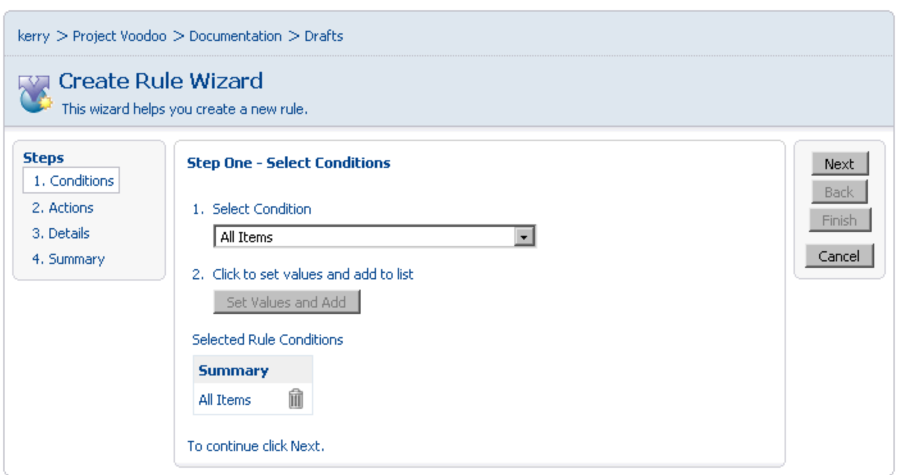


4 Click **Create Rule**. The Create Rule Wizard appears.



5 Define the conditions that are applied to the content to determine when the content action is performed:

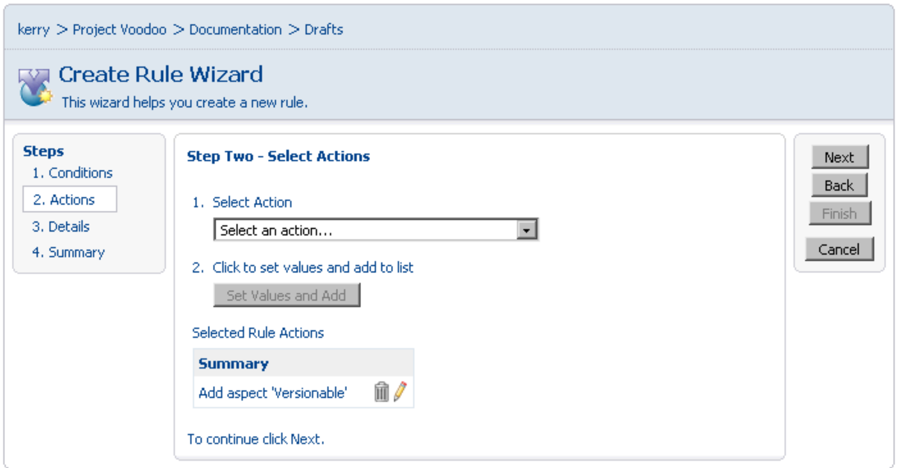
- From the **Select Condition** list, select **All Items**. The content action is performed on all content in the space.
- Click **Set Values and Add** to set the condition. The condition appears in the **Summary** list.



- Click **Next**.

6 Define the content actions to take on the content:

- From the **Select Action** list, select **Add aspect to item**.
- Click **Set Values and Add**.
- From the **Select required feature** list, select **Versionable** and click **OK**.



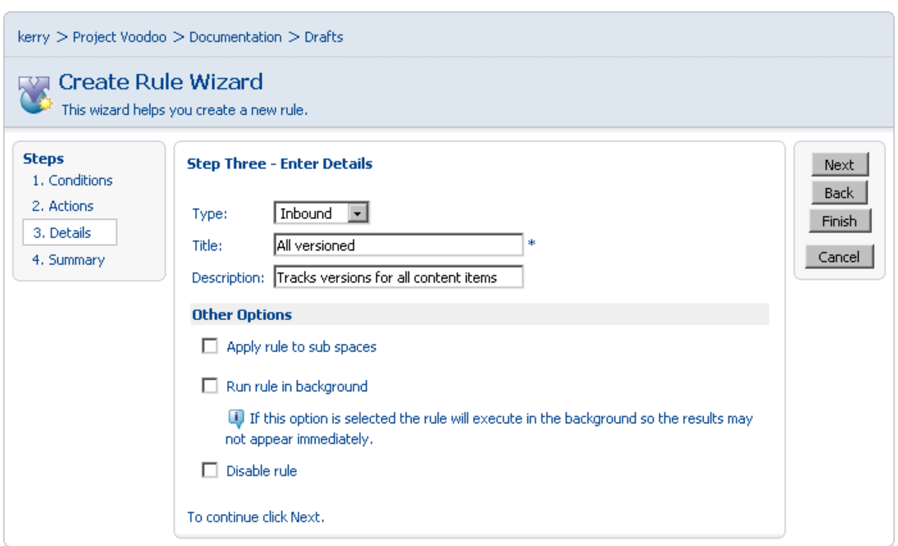
- Click **Next**.

7 Select one of the following content rule types, which determines when the content rule is applied:

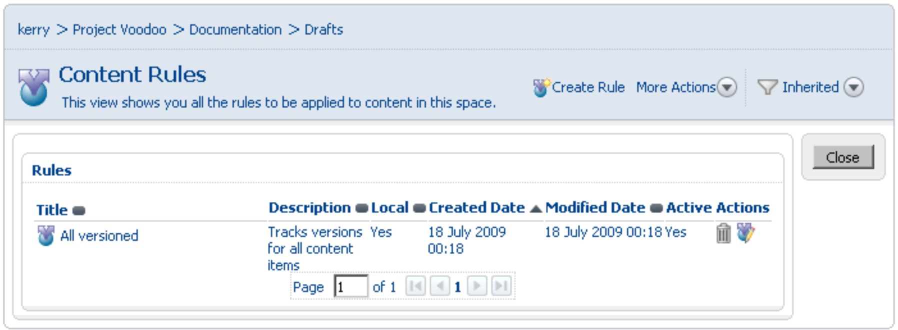
- **Inbound:** The content action occurs when content is copied, created, or added to the space.
- **Outbound:** The content action occurs when content is moved out of or deleted from the space.
- **Updated:** The content action occurs when content is updated in the space.

8 From the **Type** menu, select **Inbound** and do the following:

- In the **Title** box, type `All versioned`.
- In the **Description** box, type a description.
- Click **Next**.



9 Verify the information that you specified for the content rule and click **Finish**. The content rule appears on the Content Rules page.



Adding simple process content rules

Now you will add simple process content rules to the spaces. The process content rules move the content item through the spaces based on specific criteria. You will create the following content rules:

- **Request Approval:** Moves content from the Draft space to the Pending Approval space.
- **Publish:** Moves content from the Pending Approval space to the Publish space.

Add a content rule to request approval

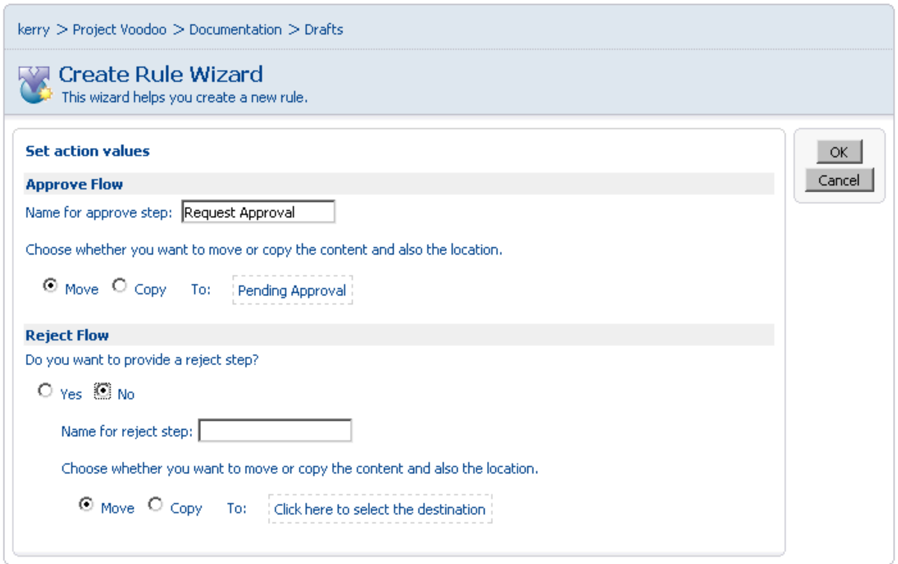
You will create a simple process content rule to apply to content in the Drafts space.

1 On the Content Rules page for the Drafts space, click **Create Rule**.

2 From the **Select Condition** list, select **All Items**, click **Add to list**, and then click **Next**.

3 Define the content actions to take on the content:

- From the **Action** list, select **Add simple process to item**, and then click **Set Values and Add**.
- Under Approve Flow, type `Request Approval` in the **Name for approve step** box.
- Under Reject Flow, select **Move** and click **Click here to select the destination**.
- Click the up arrow icon to move up a folder, and click the plus sign icon next to **Pending Approval**.
- Under Do You Want to Provide a Reject Step, select **No**.



- Click **OK** and then click **Next**.

4 From the **Type** list, select **Inbound** and, in the **Title** box, type `Simple request approval process`.

5 Click **Next**, click **Finish**, and then click **Close** to close the Content Rules page.

Add a content rule to approve or reject content

You will add another content rule so that a user can approve or reject the content that the previous content rule requests approval for. You must add this content rule to the Pending Approval space where the previous content rule moved the content.

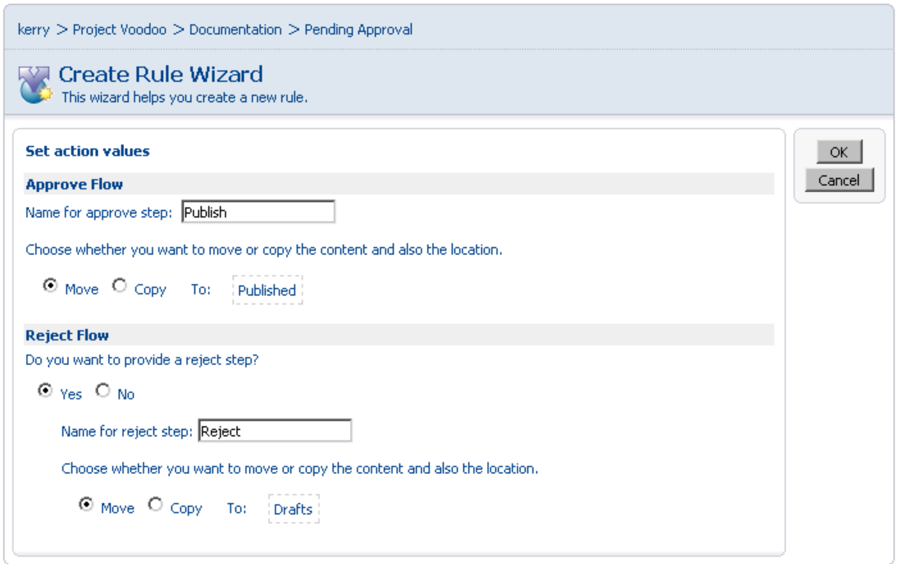
1 In the Drafts space, click **Documentation** in the breadcrumb trail to navigate up to the Documentation space, and then open the **Pending Approval** space.

2 Click **More Actions** > **Manage Content Rules** > **Create Rule**.

3 From the **Select Condition** list, select **All Items**, click **Add to list**, then click **Next**.

4 Define the content actions to take on the content:

- From the **Action** list, select **Add simple process to item**, and then click **Set Values and Add**.
- In the **Name for approve step** box, type `Publish`.
- Select **Move** and click **Click here to select the destination**.
- Click the up arrow icon to navigate up a space, and click the plus sign icon next to **Published**.
- Under Do You Want to Provide a Reject Step, select **Yes**.
- In the **Name for reject step** box, type `Reject`.
- Select **Move** and then click **Click here to select the destination**.
- Click the up arrow icon to navigate up a space and click the plus sign icon next to **Drafts**.



5. Click **OK**, and then click **Next**.
6. Select **Inbound** from the **Type** list, type `Simple request approval process` in the **Title** box, and then click **Next**.
7. Click **Finish**, and then click **Close** to close the Content Rules page.

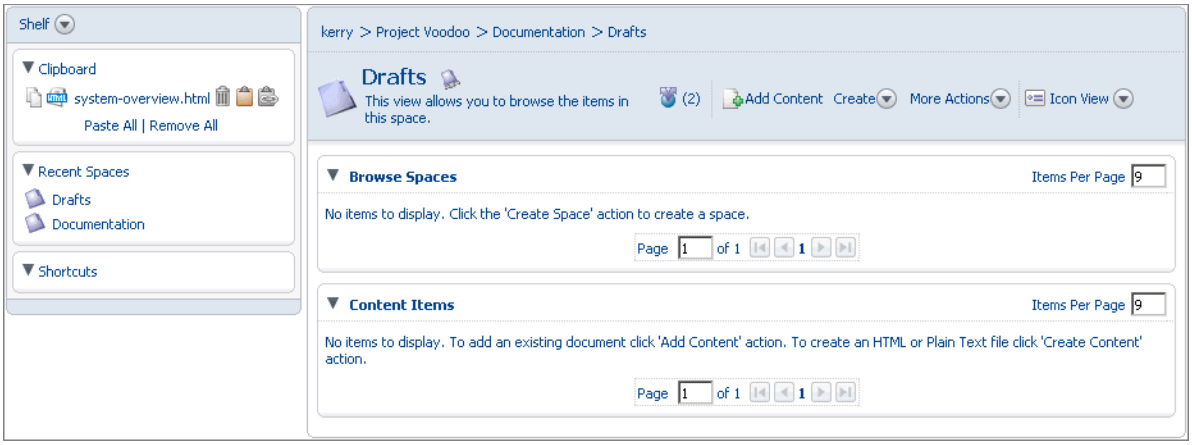
Move content using the clipboard

A sample software overview document is created by the space template you are using. Use this document to test the content rules you just created.

You can cut or copy content and paste it to a different space. If the content is cut, a reference to it is placed in the clipboard and the content remains in its original place until you paste it into the new location.

1. In the Pending Approval space, click **Documentation** in the breadcrumb trail to navigate up to the Documentation space, and then open the **Samples** space.
2. In the Content Items pane, under the system-overview.html file, click the down arrow icon and select **Copy**.
3. In the sidebar, click the down arrow icon and select **Shelf** to view the clipboard contents.

4 Click **Documentation** in the breadcrumb trail and then open the **Drafts** space.



5 Under Clipboard in the sidebar, click **Paste All**. A copy of the system-overview.html file is pasted into the Drafts space and the clipboard is cleared.

5. Collaborating with other users

Before you test the content rules you just created, you will set up your space to allow other users to work on projects within your space. To collaborate with other users, you must invite them to the space.

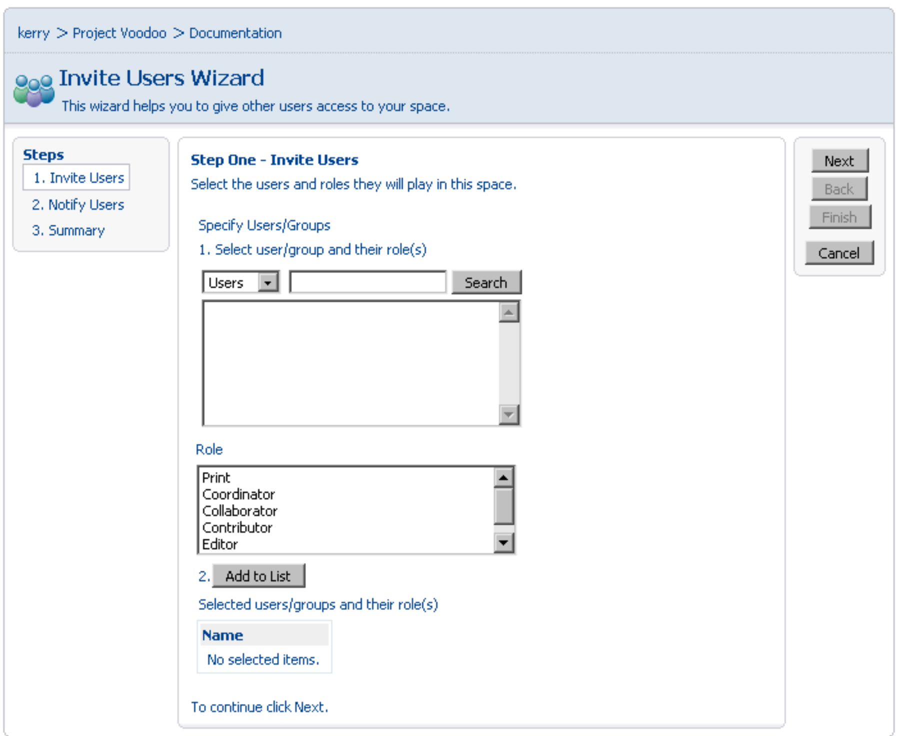
With multiple authors collaborating on the content, you need to ensure that only one person modifies a content item at a time by checking it out. This creates a working copy and locks the original. When you check in the working copy, it unlocks and overwrites the original item.

Inviting users to collaborate in your space

1 Navigate to the **Documentation** space.

2 Click **More Actions** > **Manage Space Users**. This page displays users who have permission to work on content in the Documentation space.

3 Click **Invite** in the header to invite a user to the space.



4 Enter the first or last name of a co-worker in the **Search** box and click **Search**. For this exercise, you can use your own name.

5 Select the appropriate person from the search results.

6 From the **Role** list, select **Collaborator**, click **Add to List**, and then click **Next**.

7 Under Do You Want to Send an Email to Notify the Invited Users, select **No** and then click **Next**.

8 Verify the information in the Summary and click **Finish**.

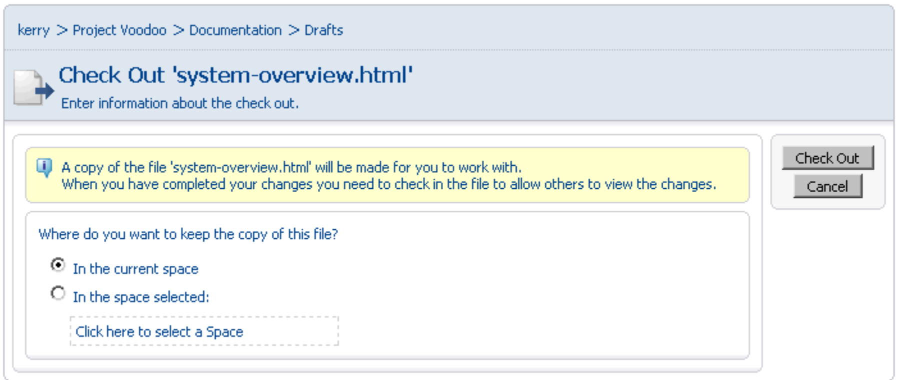
9 Click **Close** to return to the Documentation space.

Checking out a content item

Now you will check out a content item from a space so that other users cannot modify the file while you are working with it.

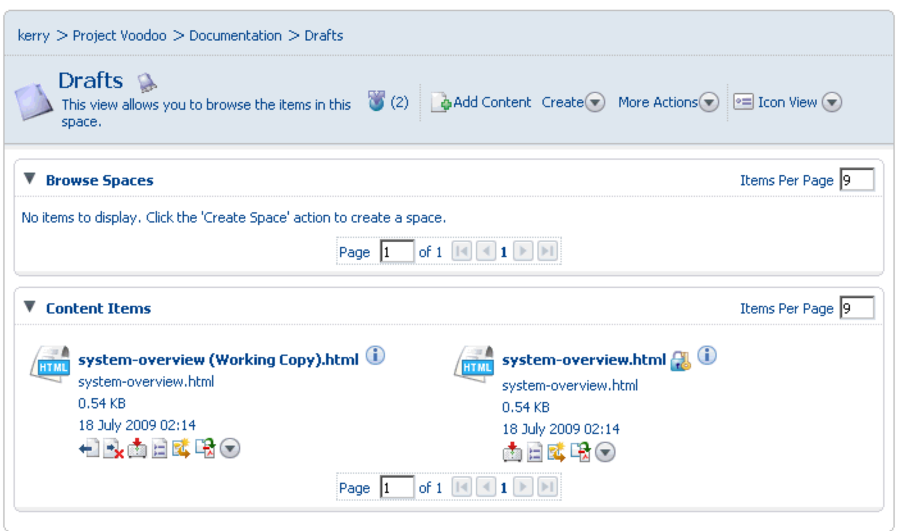
When you check out a file, you can check out the working copy to the same space as the original or to any other space. For example, you can choose to create one space to hold the working copies of all your files.

1 In the Drafts space, click the down arrow icon for the system-overview.html file, and then select **Check Out** from the menu.



2 Select **In the current space** and click **Check Out**.

3 Click **OK** to return to a view of the space, which now contains two items. One item is appended with **(Working Copy)**, as shown in this screen shot.



Checking in a content item

The Lock icon displayed beside the original content item lets you know that it cannot be modified until you check in or undo the checkout on the working copy. You can move the pointer over the lock icon on the original item to display the user name of the person who is currently editing the item.

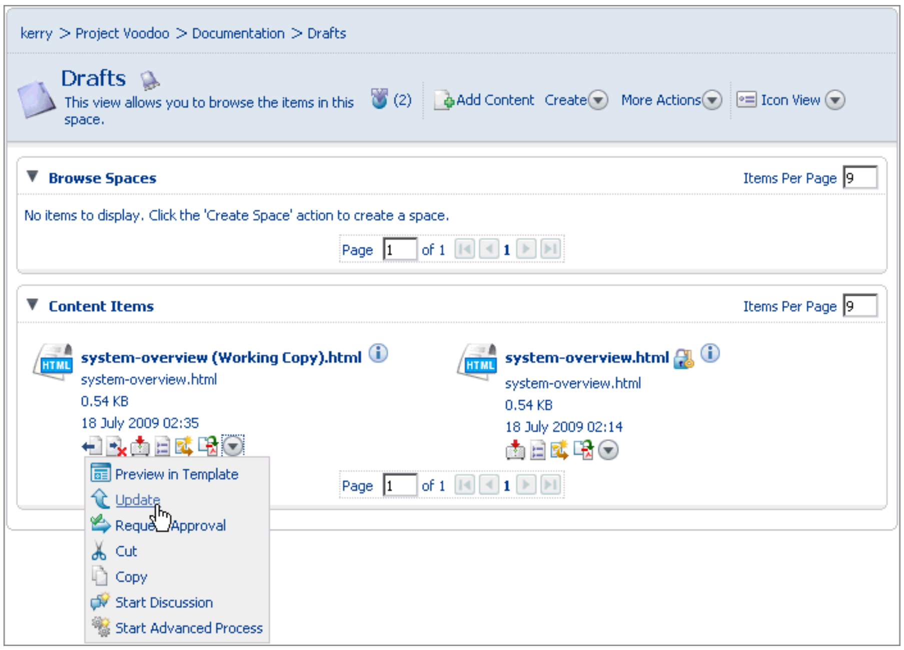
In this task, you will edit the document and add some minor changes to the text. First you will update the content item in LiveCycle Contentspace ES2 without checking it in. Then you will make additional changes to the file and check in the content.

1 Click the Download icon for the system-overview (Working Copy).html file.

2 Save the file to your desktop and then click **Close**.

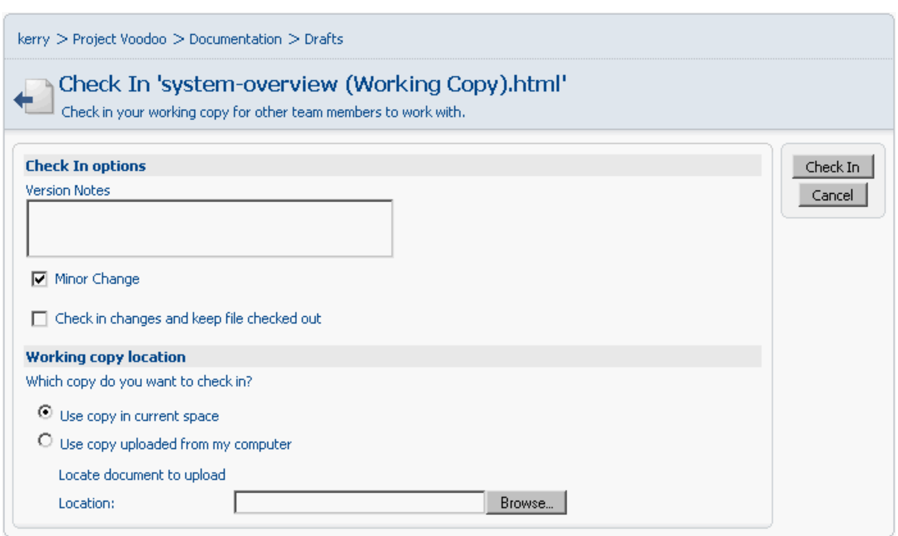
3 From your desktop, open the file in a text editor or HTML editor. Make changes to the content and save it.

4 To upload changes to the working copy without checking in the file, click the down-arrow icon and click **Update**.



5 Click **Browse**, double-click the updated file, and click **Update**.

6 Make some additional changes to the copy of the file on your desktop, return to LiveCycle Contentspace ES2, and click the **Check In** icon for the file.



7 Click **Browse** and double-click the file.

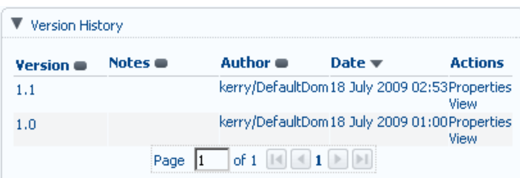
8 When the file finishes uploading, click **Check In**.

Viewing the version history

You can view the version history for content in a space. Because the content is versioned, previous iterations are available in the version history.

1 Click **View Details** for the system-overview.html file.

2 On the Details page, click the right arrow icon ▶ in the Version History pane. The original version and the version you just checked in are listed.



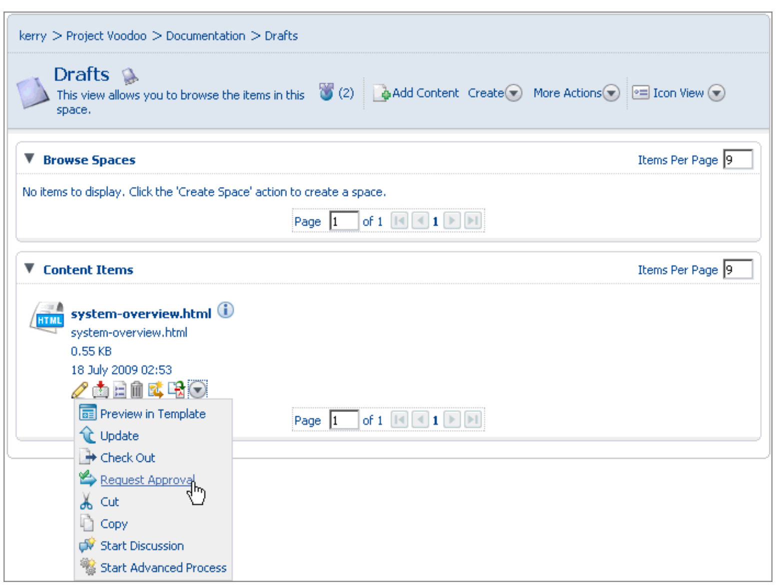
3 Click **Close** to close the Details page.

Using simple process content rules

When content is completed it can be sent for approval. Process steps that are available for a content item are shown in the More Actions menu and on the Details page that is associated with the content item.

Now you will test the process content rules that you created previously.

1 In the Drafts space, under the system-overview.html file, click the down-arrow icon and select **Request Approval**. The content item moves to the Pending Approval space.



2 Navigate to the **Pending Approval** space.

3 In the Pending Approval space, under the system-overview.html file, click the down-arrow icon . The Publish and Reject options that you created with the content rule are displayed.

4 Click **Publish**. The content moves to the Published space.

6. Working with PDF files

LiveCycle Contentspace ES2 can be integrated with LiveCycle ES2 services to enhance your document management and process management capabilities. Which tasks you can do depends on the package of LiveCycle ES2 services that your organization uses and how they are configured.

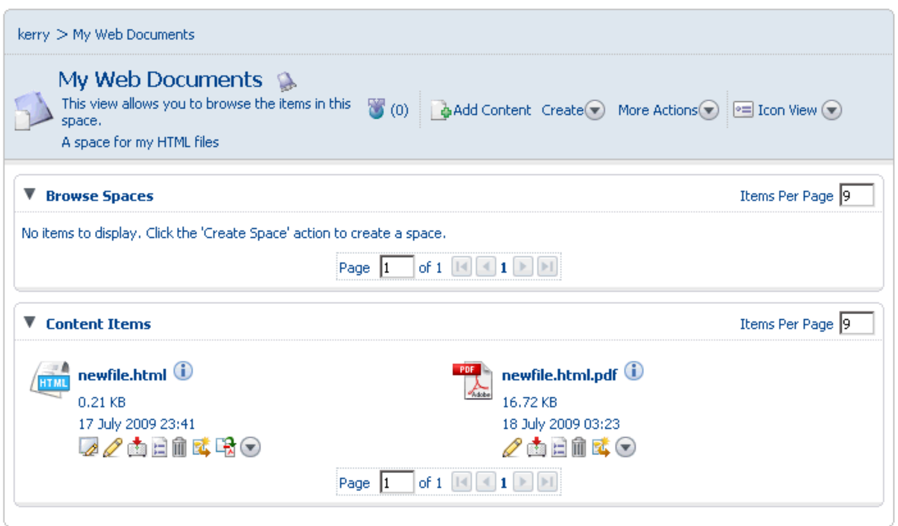
Generate PDF files

If your organization has Adobe LiveCycle PDF Generator ES2 configured to work with LiveCycle Contentspace ES2, you can quickly create PDF files from your content.

1. In your My Home space, open your **My Web Documents** space.
2. In the **Content Items** pane, under the newfile.html file, click the down arrow icon and click the **Convert to PDF** icon .

   When the conversion is completed, newfile.html.pdf is added to your My Web Documents space. You may have to leave and return to the space or click **My Web Documents** in the breadcrumb trail to refresh the space and see the file.

   ***Note:** If your organization does not have LiveCycle PDF Generator ES2 or if you do not have permissions to use it, this procedure will not produce a PDF file.*



Create a space to work with PDF files

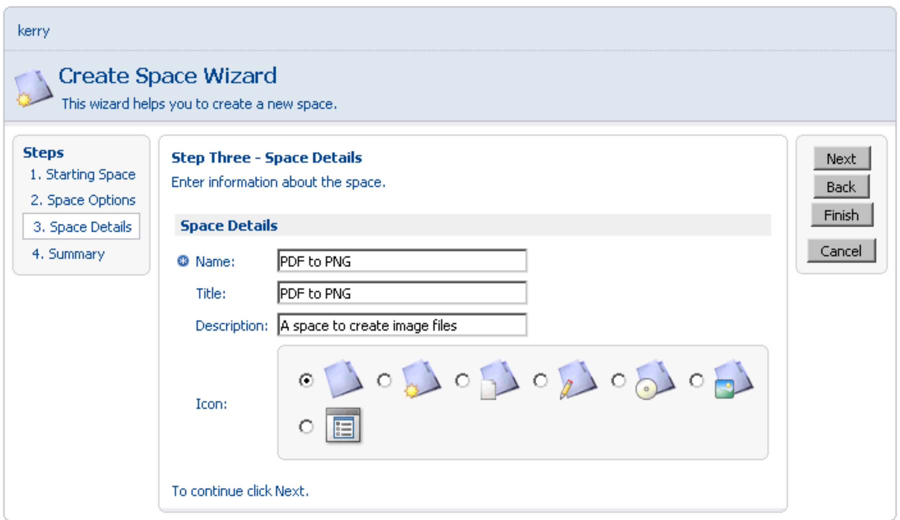
LiveCycle Contentspace ES2 includes a variety of space templates that you can use to create spaces that automatically generate files if your organization configured LiveCycle PDF Generator ES2 to work with Contentspace ES2. One space template creates a space that generates a PDF file whenever a file of one of many common formats is added to the space. Other space templates create spaces that generate files of other formats from PDF files.

Contentspace ES2 also includes a space template for a space that applies a policy to a file if LiveCycle Rights Management ES2 is integrated with Contentspace ES2.

You will create two spaces from space templates, one to generate image files from a PDF file and one to apply a policy to a PDF file.

Create a space to generate image files from a PDF file

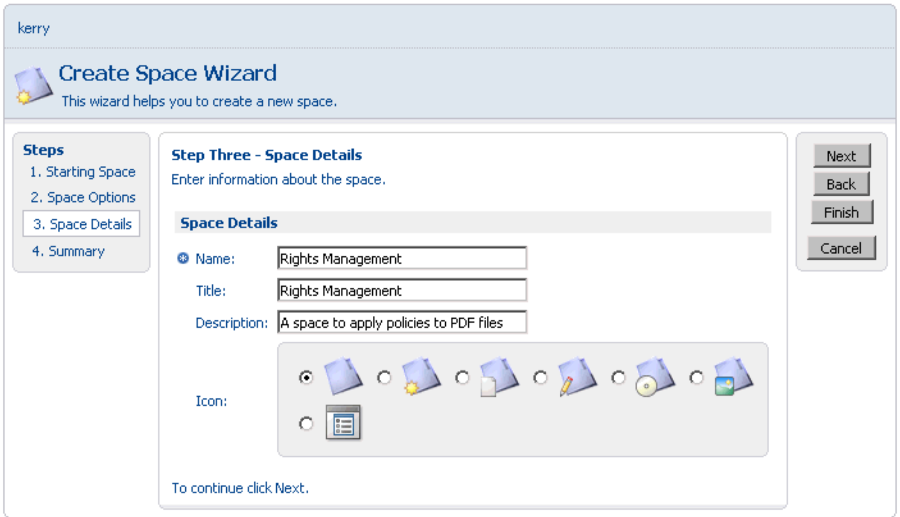
1. In the toolbar or sidebar, click **My Home** to navigate up to your home space.
2. Click **Create** > **Advanced Space Wizard**. The Create Space Wizard page appears.
3. Select **Using a template** and click **Next**.
4. Select the **PDF2PNG** template from the list and click **Next**.
5. In the **Name** box, type `PDF to PNG` and specify a title and description.
6. Select an icon and then click **Finish**.



Create a space to apply policy protection to a PDF file

1. In your My Home space, click **Create** > **Advanced Space Wizard**.
2. Select **Using a template** and click **Next**.
3. Select the **Rights Management Space** template from the list and click **Next**.
4. In the **Name** box, type `Rights Management` and specify a title and description.

5 Select an icon and then click **Finish**.



Generate an image file from a PDF

Now that you have created the new spaces, you will use them to work with a PDF file. You will copy a PDF file to the space that automatically generates a PNG image file of the PDF file.

Note: *If your organization does not have LiveCycle PDF Generator ES2 or if you do not have permissions to use it, this procedure will not produce an image file. For more information, contact your LiveCycle ES2 administrator.*

These steps also demonstrate another way to copy a file.

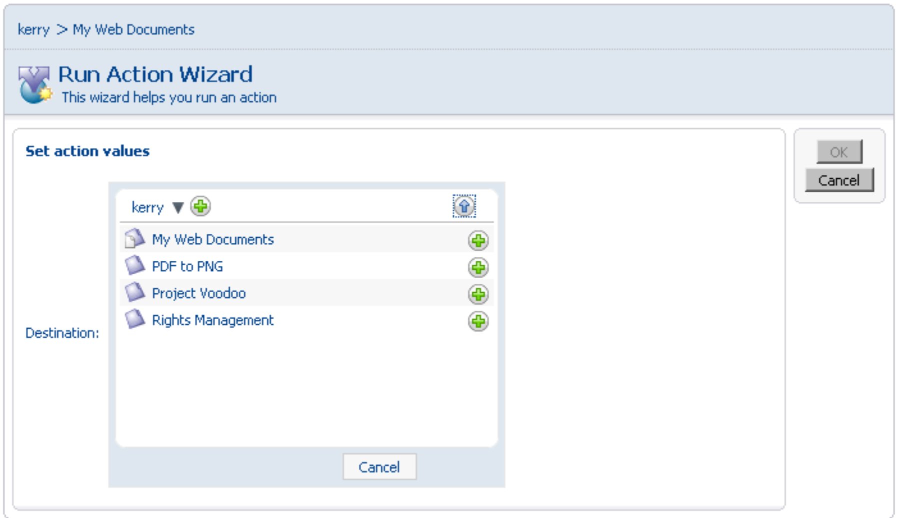
1 In the My Web Documents space, in the Content Items pane, under the newfile.html.pdf file, click **View Details** .

2 From the **Actions** list, select **Run Action**.

3 From the **Select Action** list, select **Copy Item To A Specific Space**, and then click **Set Values and Add**.

4 Click **Click here to select the destination**.

5 Click the up arrow icon to navigate up a space and click the plus sign icon next to **PDF to PNG**.



6 Click **OK** and then click **Finish**.

7 Click **Close** and then navigate to the **PDF to PNG** > **Output** space. The newfile.html.png file should be in the space. If the PDF has more than one page, each page will be a separate PNG file.

Apply a policy to a PDF file

If your organization has LiveCycle Rights Management ES2, you can apply a policy to a PDF file in LiveCycle Contentspace ES2. Using Contentspace ES2 with Rights Management ES2, you can apply predefined confidentiality settings to prevent information from spreading beyond your reach. You can also monitor and control how recipients use your documents after you distribute them.

You protect documents by using policies. A *policy* is a collection of information that includes confidentiality settings and a list of authorized users. The confidentiality settings in a policy determine how a recipient can use a file that you apply the policy to. For example, you can specify whether recipients can print or copy text, make changes to text, or add signatures and comments to protected documents.

Within Contentspace ES2, you can apply policies to PDF files in two different ways:

- Use the Run Action wizard to secure a PDF file with any policy you have access to.
- Use a space that was created with the Rights Management Space template to apply the ContentServicesPolicy policy to a PDF file. The ContentServicesPolicy policy allows some access restrictions to be based on the roles that are granted to users in Contentspace ES2 instead of on the policy settings.

***Note:** If your organization does not have LiveCycle Rights Management ES2 or if you do not have permissions to use it, this procedure will not apply a policy to the file. For more information, contact your LiveCycle ES2 administrator.*

1 In the My Web Documents space, in the Content Items pane, under the newfile.html.pdf file, click the down arrow icon and select **Copy**.

2 In the sidebar, click the down arrow icon and select **Shelf** to view the clipboard contents.

3 Navigate to the **Rights Management** space.

4 In the clipboard, click **Paste All**. A copy of newfile.html.pdf is pasted into the Rights Management space and the clipboard is cleared. If you have access to Rights Management ES2, the ContentServicesPolicy policy is applied to the file.

7. Reviewing, commenting, and approving

LiveCycle Contentspace ES2 provides several ways for people to review documents. If content is still being designed, you can initiate a shared review in which you specify the deadline and participants for a PDF review. Review participants can add comments and view each others' comments.

Now you will create an ad hoc review for the PDF file that you generated and add comments. Then you will submit this form for review and approval as part of an advanced process.

Note: *The procedures in this chapter work only if your organization enabled review and commenting and installed the LiveCycle Content Services ES2 Samples, LiveCycle Process Management ES2, and LiveCycle Workspace ES2.*

Sending a document for review

Note: *The procedures in this section work only if your organization enabled review and commenting.*

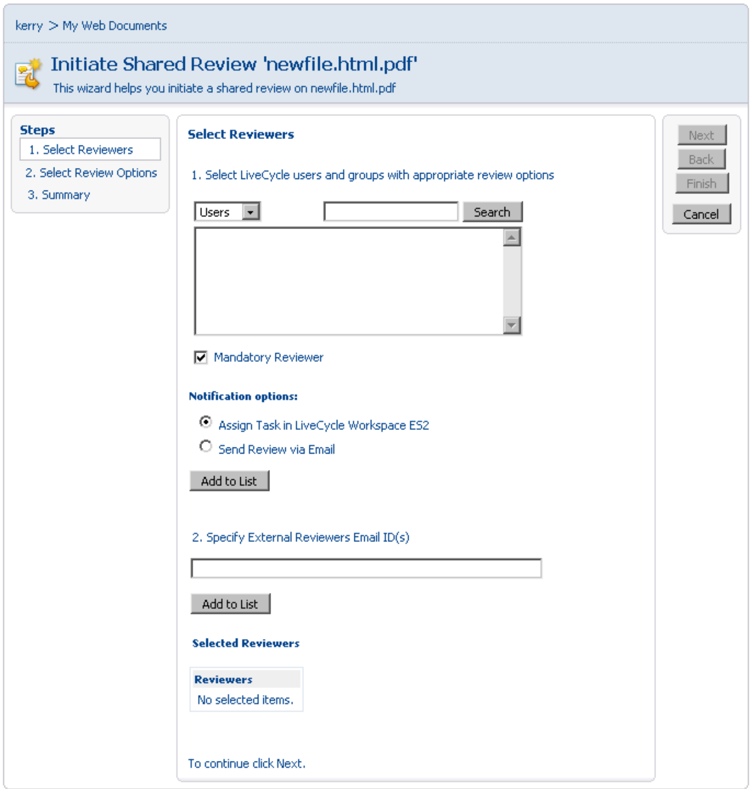
Yo can choose from two basic types of shared reviews, ad hoc and structured. In an *ad hoc review*, any eligible document in a space is submitted for a review, and the review initiator determines the review deadline and participants. A *structured review* includes preset review properties that are determined by the administrator who creates the space template or workspace properties. Structured reviews are especially useful for applications that require strict compliance to regulatory procedures.

Now you will initiate an ad hoc review.

1 Navigate to your **My Web Documents** folder.

2 In the Content Items pane, under newfile.html.PDF, click the **Initiate Shared Review** icon . (If you did not create this file in a previous lesson, use any PDF file.)

   For the purposes of this tutorial, you will set yourself as the reviewer.



3 In the Select Reviewers pane, type your name in the **Search** box and click **Search**.

4 Select your name from the **Reviewer** list, select **Mandatory Reviewer** and **Assign Task** in LiveCycle Workspace ES2, and then click **Add to List**.

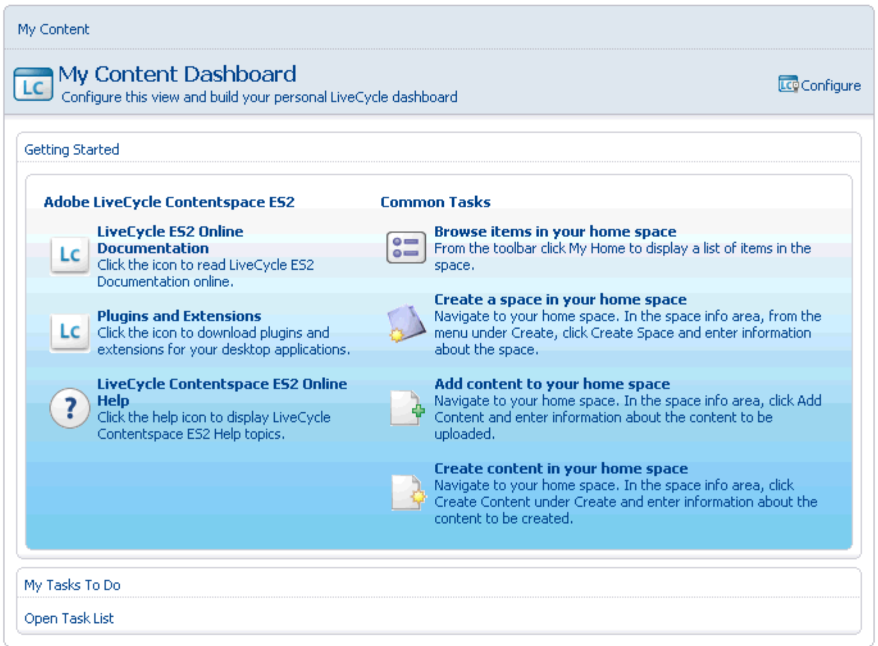
5 Add any other review participants, and then click **Next**.

6 In the **Name** box, type `Newfile Review`, change **Review Duration** to **3** days, and then click **Finish**.

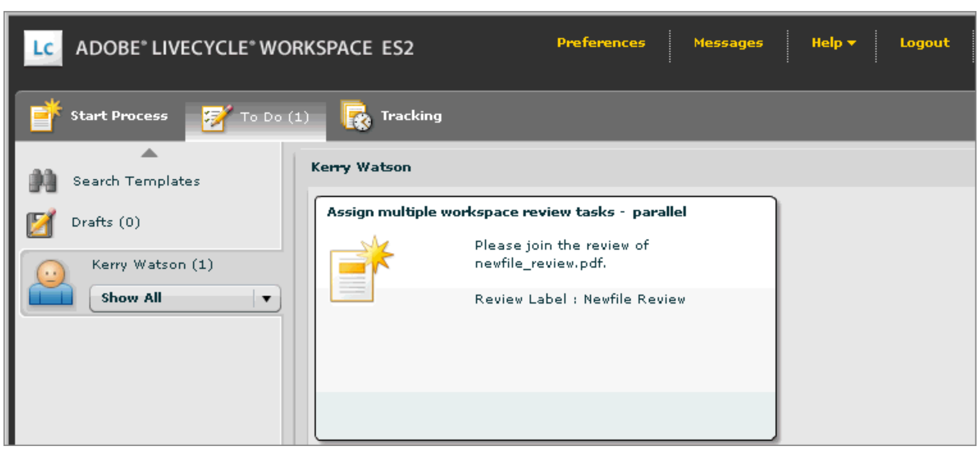
Adding review comments

When a document is initiated for review, it can be sent by email or routed to the reviewer's To Do list in LiveCycle Workspace ES2. Because you set yourself as the reviewer, you can now open your To Do list to add comments to the document.

1 Click **My Content** in the toolbar or sidebar.



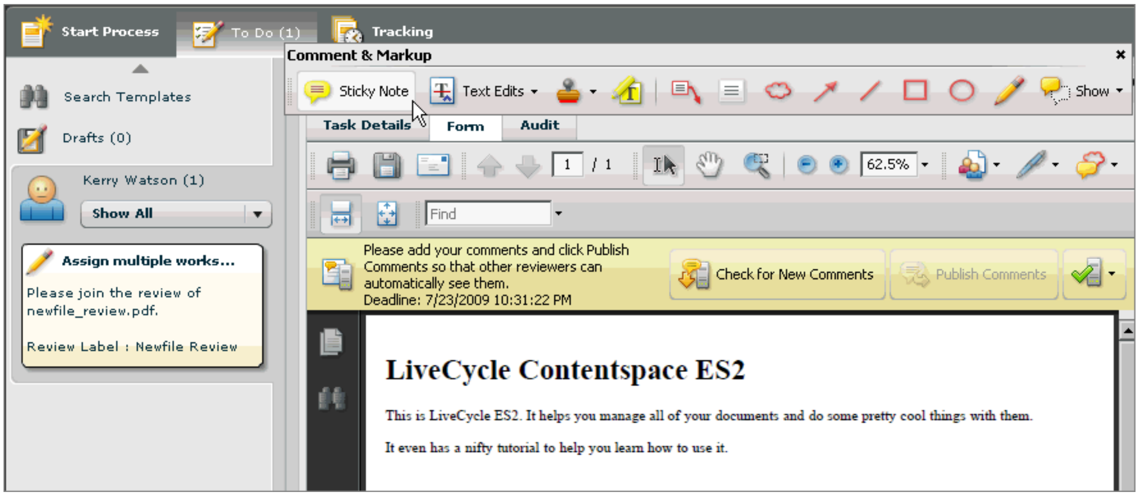
2 At the bottom of the page, click **Open Task List**. Workspace ES2 opens to your To Do list page. If you are prompted to log in, use the same user name and password that you use for Contentspace ES2.



Adobe LiveCycle Workspace ES2 opens in a different browser tab or window.

3 Click the task icon.

4 Click **Connect**, and follow the prompts to join the review in Acrobat.com.



5 Click the **Sticky Note** icon in the Comment & Markup toolbar, and click in the document area and type a comment.

6 Click **Publish Comments**.

7 When you finish adding comments, click **Complete** at the bottom of the page to let other reviewers know that you are finished and to remove the item from your To Do list.

8 Close the Workspace ES2 browser tab or window, and return to Contentspace ES2.

Viewing review comments

After the reviewer completes the review, you can use the My Reviews pane to track the review.

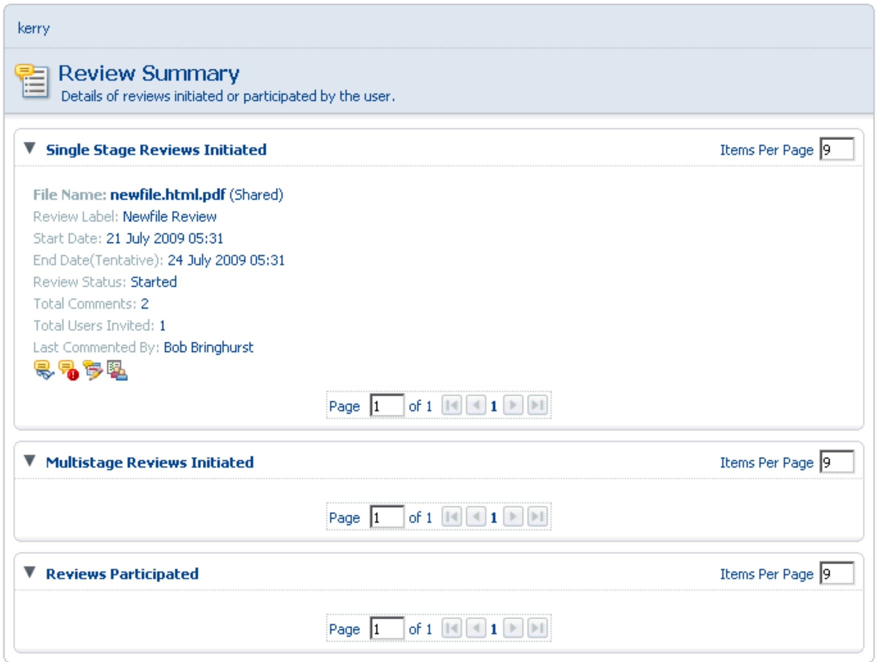
1 In Contentspace ES2, click **My Reviews** in the toolbar.

2 Click the **View Details** icon to view review details.

3 When you finish looking at review details, click **Close**.

4 (Optional) Do any of these tasks:

- Click the Newfile.html.pdf file name to open the review document and view comments.
- Click the **Modify Deadline** icon to change the review duration.
- Click the **Manage Reviewers** icon to add or remove review participants.
- Click the **Terminate Review** icon to terminate the review. When the review is terminated, you can click the **Delete Review** icon to delete the review.



Starting a review and approval process

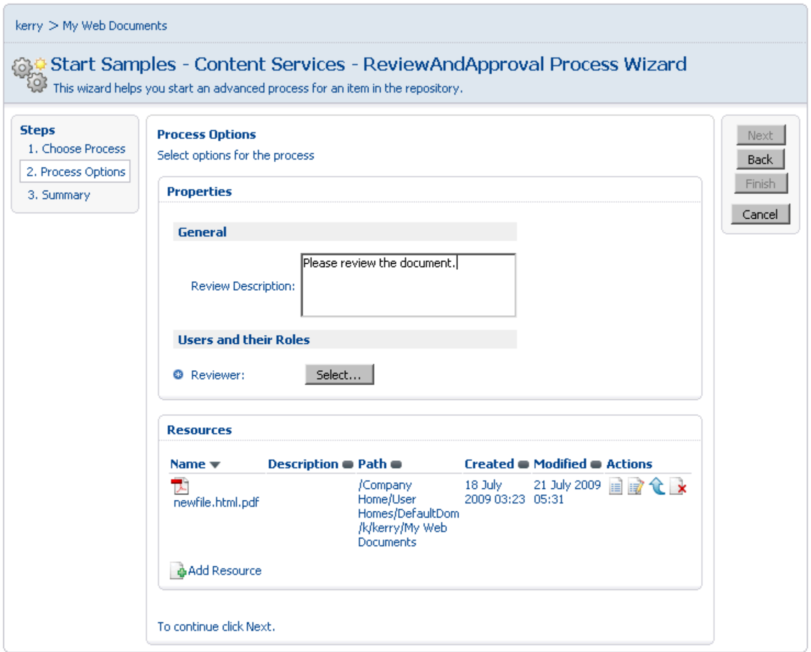
LiveCycle Content Services ES2 can work with Adobe LiveCycle Process Management ES2 and Adobe LiveCycle Workspace ES2 to automate processes that are related to documents and forms that are stored in LiveCycle Contentspace ES2. For example, you use these modules to manage an advanced process that routes documents to other users for approval.

Now you will send the PDF file that you generated for review and approval.

***Note:** The procedures in this section work only if your organization installed LiveCycle Content Services ES2 Samples, LiveCycle Process Management ES2, and LiveCycle Workspace ES2.*

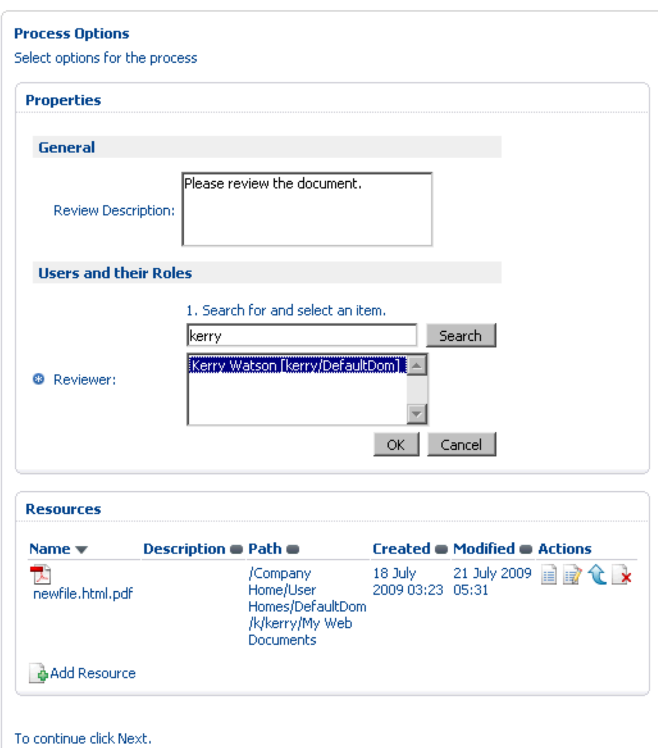
1 Navigate to your **My Web Documents** folder.
2 In the Content Items pane, under newfile.html.PDF, click the down arrow icon and select **Start Advanced Process**.
3 Select **Review and Approval** and click **Next**.

4 Type a description in the **Review Description** box.



5 Click **Select** to select a reviewer. For the purposes of this tutorial, you will set yourself as the reviewer.

6 Type your name in the **Search** box and click **Search**.



7 Select your name from the **Reviewer** list, click **OK**, and then click **Finish**.

Review and approve a document

When a document is sent for review as part of an advanced process, it is routed to the reviewer's To Do list in LiveCycle Workspace ES2. Because you set yourself as the reviewer, you can now open your To Do list to review and approve the document.

***Note:** If your organization does not have LiveCycle Process Management ES2 and LiveCycle Workspace ES2 or if you do not have permissions to use LiveCycle Workspace ES2, this procedure will not work. For more information, contact your LiveCycle ES2 administrator.*

1 Click **My Content** in the toolbar or sidebar.

2 At the bottom of the page, click **Open Task List**. Workspace ES2 opens to your To Do list page. If you are prompted to log in, use the same user name and password that you use for Contentspace ES2.

3 Locate the **Assign Task to Reviewer** task in your **To Do** list and click the task icon to open it. A PDF form appears, where you can add your review comments.

4 Click **Maximize** . The visible area of the form expands and additional options become available.

5 On the left side of the form, click **Attachments** .

6 Select the document for review and click **Open**. The document opens in its native application. It is read-only. Comments must be entered in the text box on the form.

7 Close the document when you finish reviewing it.

8 Type your comments in the **Review Comments** box.

9 Select **Approved** to approve the document.

10 Select **Submit Review** and click **Submit**.

You can close Workspace ES2 if you are finished with your To Do list. Do not click **Logout** unless you intend to log out of all LiveCycle ES2 applications, including Contentspace ES2.

Read review comments

After the reviewer completes the review, the review form is routed back to your To Do list.

In this example, the form routes back to your own To Do list. If the Assign Task to Review Initiator task does not appear in your To Do list immediately, you can close LiveCycle Workspace ES2 without logging out and then open your To Do list again from LiveCycle Contentspace ES2.

1 In the toolbar or sidebar, click **My Content**.
2 At the bottom of the page, click **Open Task List**. Workspace ES2 opens to your To Do list page.
3 Locate the **Assign Task to Review Initiator** task in your **To Do** list and click the task icon to open it. A PDF form appears; it contains the review comments.
4 When you finish reading the comments, click **Complete** to close the form and remove the task from your To Do list.

If you need to review the comments again but did not save the form locally, you can find it on your Tracking page in Workspace ES2.

8. Categorizing content and advanced search

You can assign categories to content items. This feature allows information to be classified in any number of ways. You can search for content items that match combinations of constraints, including categories. Categories are hierarchical; therefore, searching for a content item by category finds anything that is classified below it. In this example, you will add some content to a category and then search for it.

Set categories for content

First, you must allow the content to be categorized.

Allow content to be categorized

1 In the Project Voodoo > Documentation > Published space, for the system-overview.html file, click **View Details**.

2 In the Category pane, click the right arrow icon and then click **Allow Categorization**. After allowing content to be categorized, you can set categories for your content.

Set categories for content

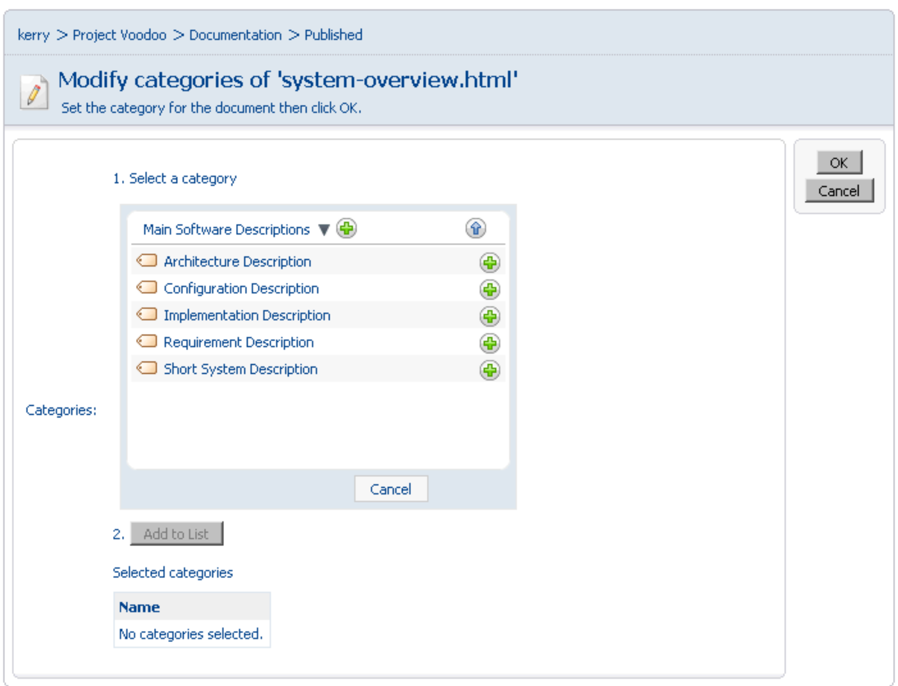
1 On the Details of system-overview.html page, in the upper-right corner of the Category pane, click **Change Category**.

2 Click **Select** and then click **Click here to select a category**.

3 Click **Software Document Classification** to view its subcategories.

4 Click **Software Descriptions** and then click **Main Software Descriptions** to move down through the subcategories.

5 Click the plus sign icon next to **Short System Description** to select it.



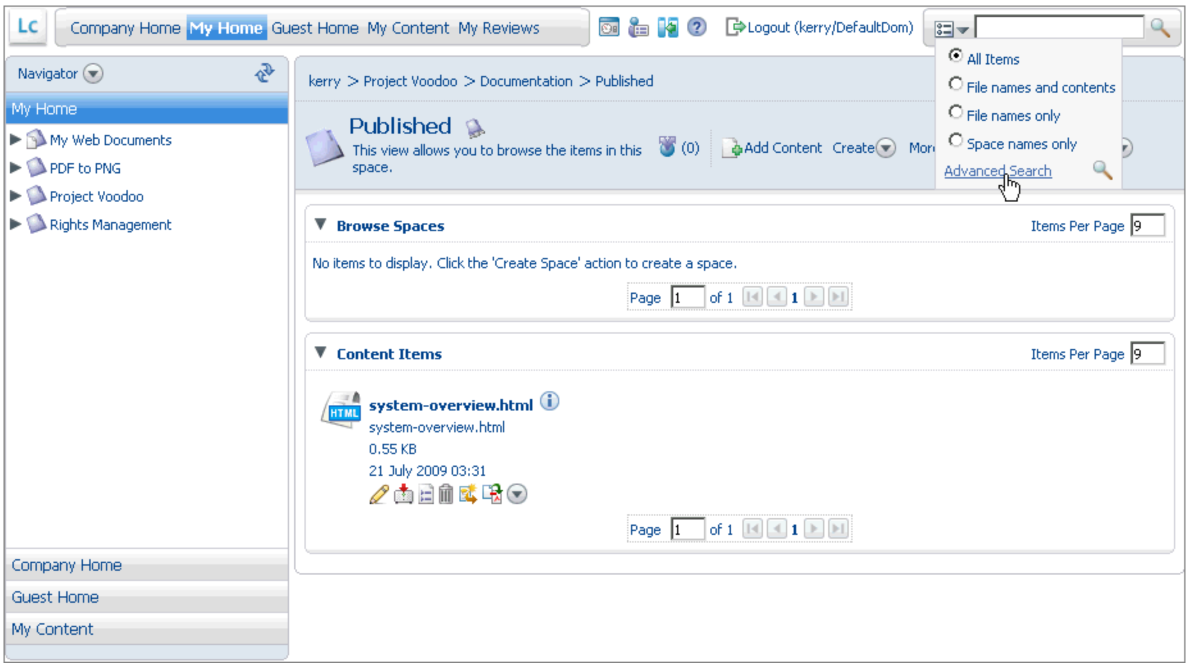
6 Click **Add to List**, click **OK**, and then click **Close**.

Search for categorized content

Now you will use Advanced Search features to search for categorized content.

You can also include other options for the search, such as the type of file you are looking for or a range of dates for its creation or modification.

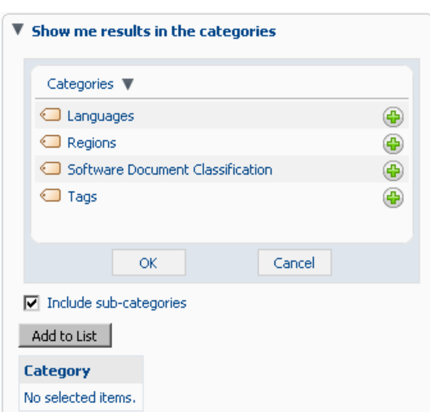
1 In the toolbar, click **Search Options** and select **Advanced Search**. The Advanced Search provides multiple criteria, including categories, which you can search under for a content item.



2 Under Show Me Results in the Categories pane, click **Click here to select a category**.

3 Click the plus sign icon next to **Software Document Classification** to select it as the category.

4 Select **Include sub-categories** and then click **Add to List**.



5 Click **Search**. For this example, only one document matches this criteria.

9. Forums and discussions

LiveCycle Contentspace ES2 provides an easy way for people to collaborate by using forums and discussions. Forums contain topics of discussion and topics contain posts from different users.

Create a forum space

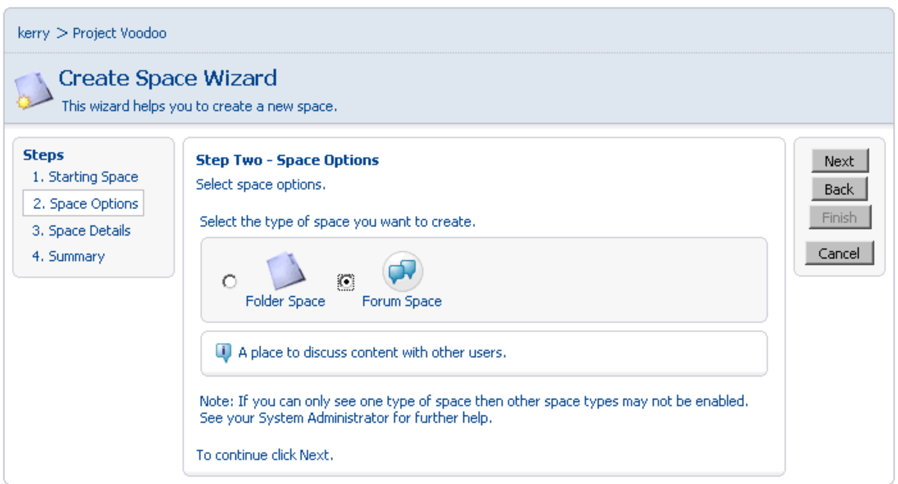
A *forum space* allows people to collaborate by using forums. A *forum space* can contain other forum spaces and any number of forums.

For this task, you will create a forum space that contains a subforum space and then create a new forum.

1 Use the breadcrumb trail to navigate to the **Project Voodoo** space.

2 Click **Create** > **Advanced Space Wizard**.

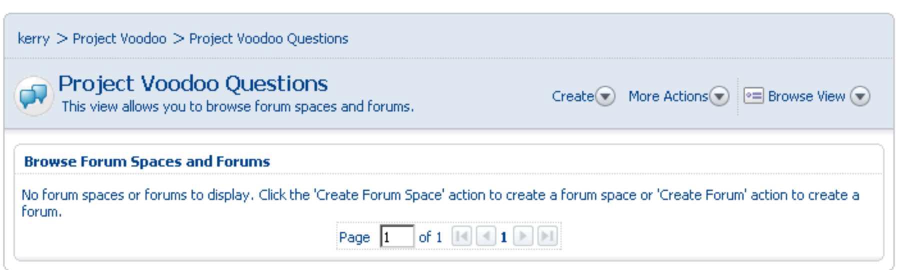
3 Select **From scratch** and click **Next**.



4 Select **Forum Space** and click **Next**.

5 In the **Name** box, type `Project Voodoo Questions`, and then click **Finish**.

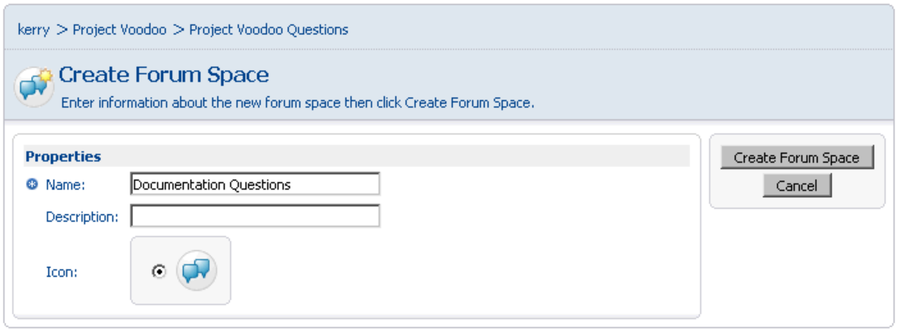
6 Open the **Project Voodoo Questions** forum space.



You will use a subforum space to organize your forums.

7 Click **Create** > **Create Forum Space**.

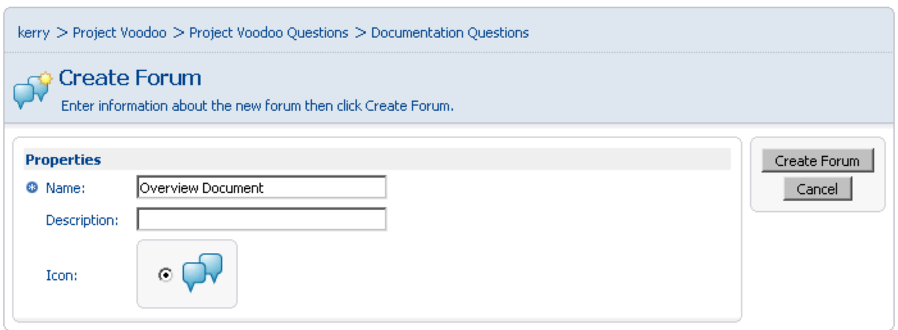
8 In the **Name** box, type `Documentation Questions`, and then click **Create Forum Space**.



9 Open the **Documentation Questions** space.

10 Click **Create** > **Create Forum**.

11 In the **Name** box, type `Overview Document`, and then click **Create Forum**.



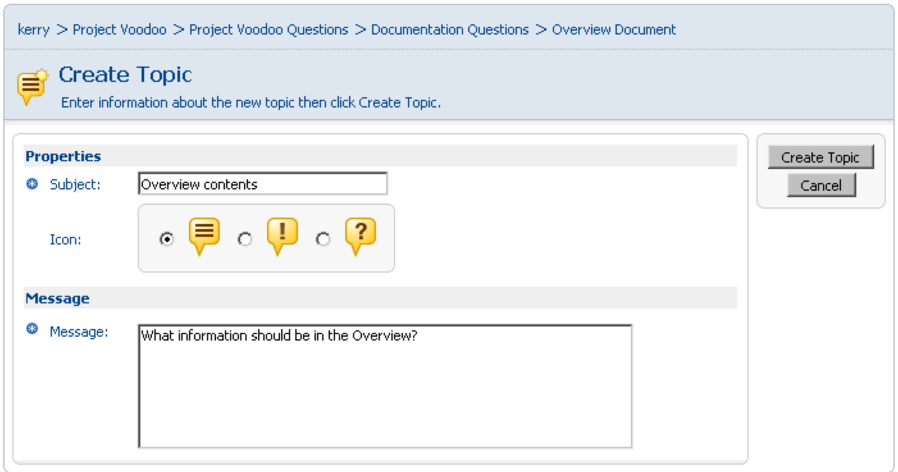
Create a topic

In this task, you will create a topic within a forum.

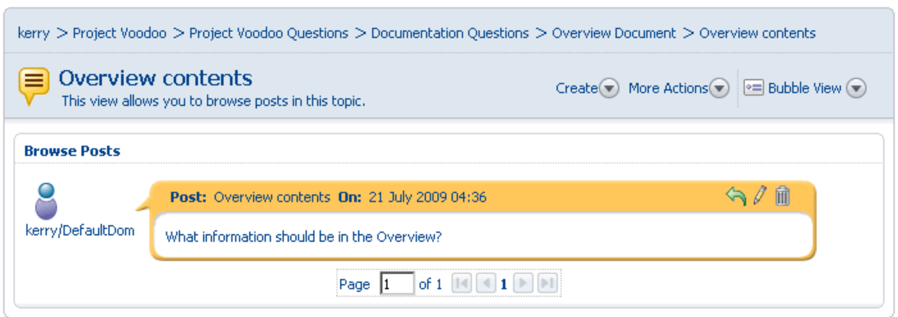
1 Open the **Overview Document** forum.

2 Click **Create** > **Create Topic**.

3 Type text in the **Subject** and **Message** boxes. You can also select an icon to represent the type of message you are posting.



4 Click **Create Topic**.



After a topic is created, it can always be changed or even deleted. The icons on a post determine which actions you can take. Any user who has the appropriate permissions can reply to the post. By default, the most recent post is at the top of the list, as shown in the above screen shot.

Start a discussion

A *discussion* is like a forum that is attached to a content item. Wherever the file is moved, the discussion goes with it. Discussions provide an ideal way to record decisions or annotations about a file without changing its content.

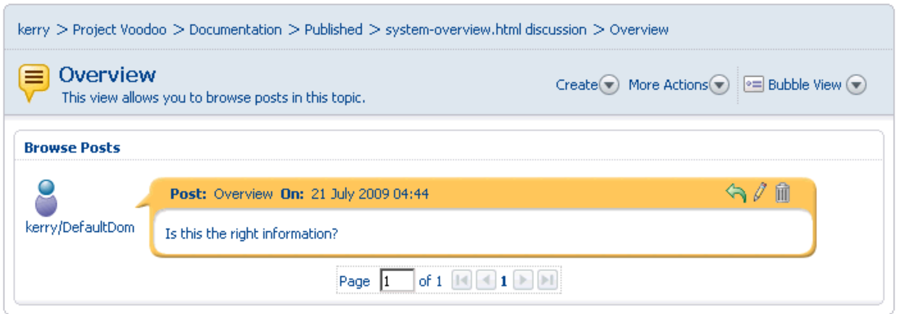
1 Navigate back to the **Project Voodoo** > **Documentation** > **Published** folder.

2 Below system-overview.html, click the down arrow icon and select **Start Discussion**.

3 Type text in the **Subject** and **Message** boxes, and click **Create Topic**.

4 Navigate back to the **Pubished** folder.

5 To view the discussion on the content item, under the content item, click **View Discussions** .



If you check out a document that has a discussion, the working draft will not have that discussion. However, if you start a discussion on a working copy, when it is checked in, the discussion is added to the original item with a date stamp. While content is checked out, the original content is locked, but discussions can still continue on it.