

Content Server Document Management Quick Navigation with Favorites

Believe in
children

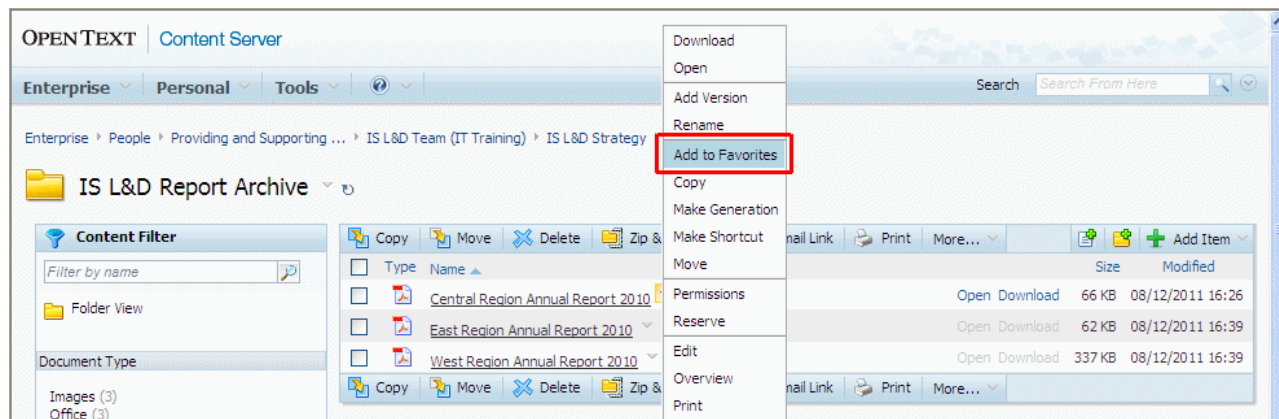


Content Server Favourites are quick links that you can create to enable you to return to locations and documents that you need to access often.

Creating Content Server Favorites

To create a Content Server favourite:

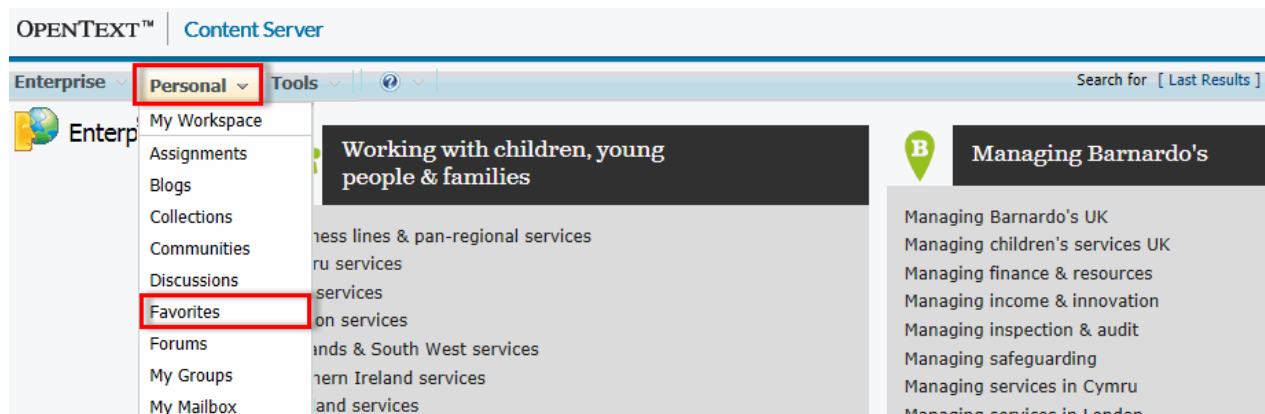
- Navigate to the item on Content Server.
- Click on the **Function** button (▼) to the right of the item.
- Choose **Add to Favorites** from the menu that appears.



Note: Items are not moved when you create a Favorite from them. The item in the Favorites list behaves in the same way as the original item, but is in fact just a link to the original item.

Using Your Favorites in Content Server

You can get to your Favourites page on Content Server by clicking on the **Personal** menu and choosing **Favorites**, as illustrated below.



The example below shows a typical Favorites page on Content Server containing four favourites;



To use a favorite:

- Click on the favourite and the item is opened.
- Click on the **Function** button (▼) to the right of a favorite to access other functions, such as **Copy**, **Move**, **Rename** etc.
- Use the **Edit**, **Open** or **Download** links to the right of any items where they appear

Note: If you use functions like edit, move, rename etc. be aware of the fact that you are actually editing the original object, not just the favorite. You will not be allowed to do something that you do not have permission to do (such as deleting something from a fileroom or renaming a file in another team's work area).

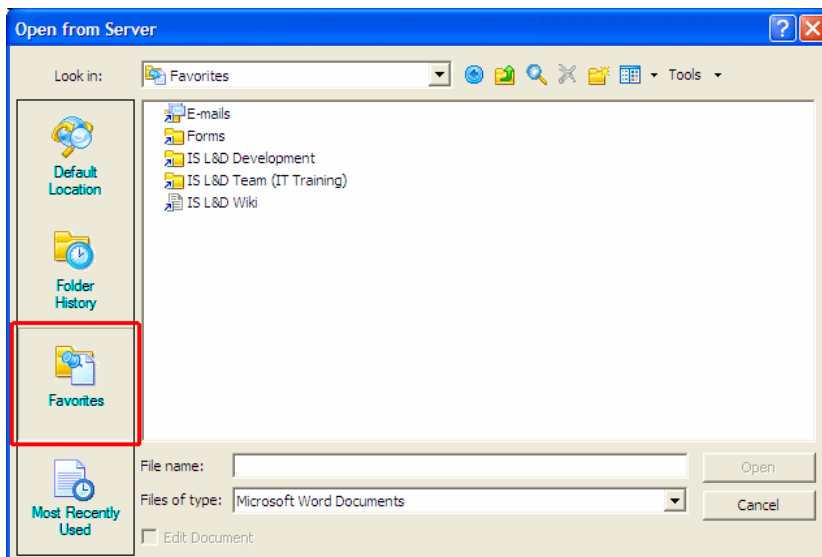
Using Favorites in Applications

Content Server Favourites can be used as shortcuts when you use the **OpenText Explorer** menu to open or save documents or to save emails, as in the examples below.

MS Office (Word Excel, PowerPoint and Project)

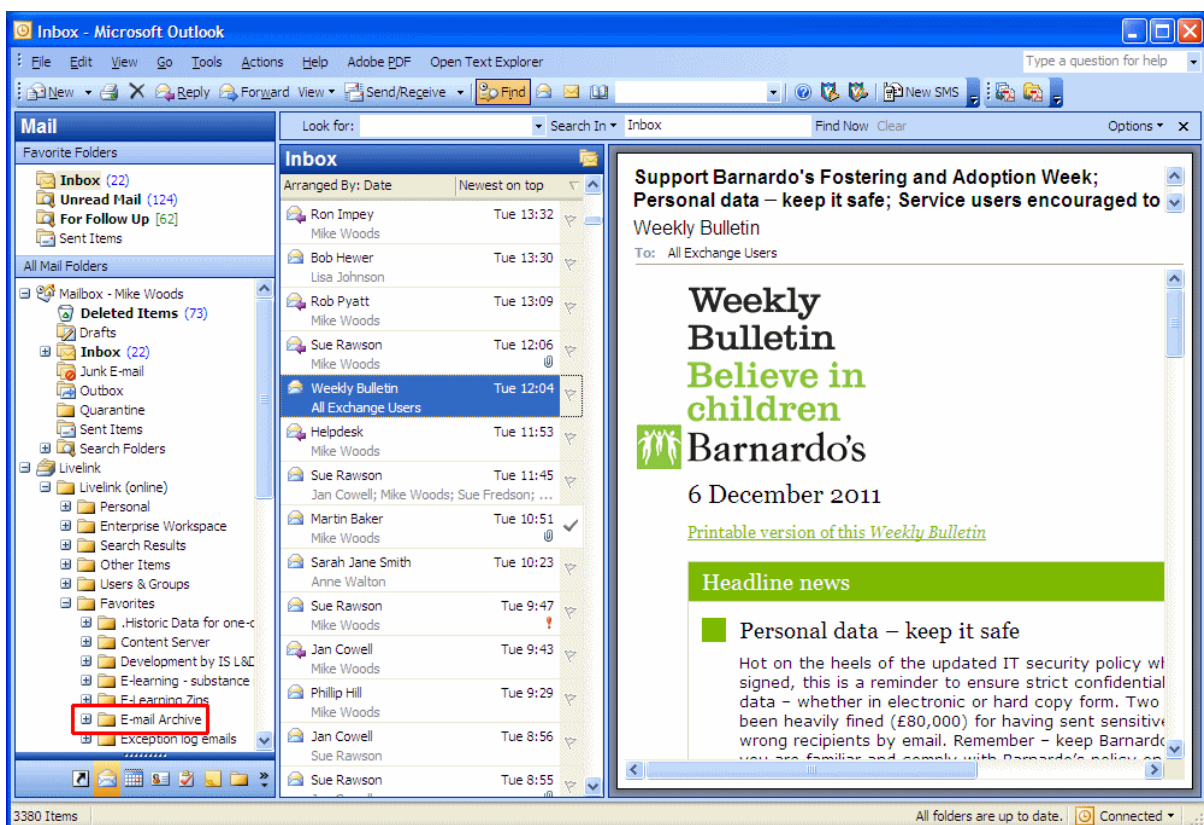
When you save or open a document using the **OpenText Explorer** menu you will see a dialog box similar to the one illustrated below.

You can use the **Favorites** button highlighted to navigate to locations or select documents that you have added to your Favorites.



MS Outlook (Email)



In MS Outlook there is a Favorites folder in the left panel as illustrated below (If this is not initially visible, click on the small + signs to the left of the Livelink folders to reveal it).




You can drag and drop emails into any folders in Content Server, including any in your Favorites, such as the E-mail Archive folder highlighted above.

Grouping Your Favorites

If you have a lot of favorites you can group them by creating tabs on your Favorites page.

- Click on the  button, then the  button to create new tabs

- Click on the  [Edit/Organize](#) button to move your shortcuts onto different tabs

Here is an example showing two new tabs (**Admin** and **Recording**) and some favorites that have been moved onto the Admin tab.

