FIG. 2

(54) Title: AUTOMATIC AND SEMI-AUTOMATIC TAGGING FEATURE OF WORK ITEMS IN A SHARED WORKSPACE FOR METADATA TRACKING IN A CLOUD-BASED CONTENT MANAGEMENT SYSTEM WITH SELECTIVE OR OPTIONAL USER CONTRIBUTION

(57) Abstract: Systems and methods for supporting metadata for work items stored in a web-based content management system with collaboration environment are disclosed. Users uploading work items to a folder are not required to provide metadata for the work items. Collaborators of the folder can provide metadata to work items within the folder.
AUTOMATIC AND SEMI-AUTOMATIC TAGGING FEATURES OF WORK ITEMS IN A SHARED WORKSPACE FOR METADATA TRACKING IN A CLOUD-BASED CONTENT MANAGEMENT SYSTEM WITH SELECTIVE OR OPTIONAL USER CONTRIBUTION

CROSS REFERENCE TO RELATED APPLICATIONS

[0001] This application is related to U.S. Patent Application No. 13/165,725 entitled "Batch Uploading of Content to a Web-Based Collaboration Environment", which was filed on June 21, 2011, the contents of which are incorporated by reference herein in its entirety.

BACKGROUND

[0002] Accurate, descriptive metadata about the contents and context of data files stored in a data repository is needed to ensure that a search for information in the repository is quick and effective.

BRIEF DESCRIPTION OF THE DRAWINGS

[0003] Examples of a web-based content management system with a collaboration environment that supports metadata are illustrated in the figures. The examples and figures are illustrative rather than limiting.

[0004] FIG. 1 illustrates an example diagram of a system where a host server supports file metadata in an online collaboration environment.

[0005] FIG. 2 depicts an example diagram of a web-based or online collaboration platform deployed in an enterprise or other organizational setting for organizing work items and workspaces.

[0006] FIG. 3 depicts a block diagram illustrating an example of components in the host server of a web-based collaboration environment that supports file metadata.
A system is described for supporting metadata for work items stored in a workspace in a web-based content management system with a collaboration environment. The creator of the workspace specifies metadata attributes for all work items stored in the workspace. However, a user uploading a work item to the workspace is not required to provide metadata for the specified attributes before being...
permitted to upload the work item to the workspace. Collaborators of the workspace can provide metadata for any work item stored within the folder.

[0018] Various aspects and examples of the invention will now be described. The following description provides specific details for a thorough understanding and enabling description of these examples. One skilled in the art will understand, however, that the invention may be practiced without many of these details. Additionally, some well-known structures or functions may not be shown or described in detail, so as to avoid unnecessarily obscuring the relevant description.

[0019] The terminology used in the description presented below is intended to be interpreted in its broadest reasonable manner, even though it is being used in conjunction with a detailed description of certain specific examples of the technology. Certain terms may even be emphasized below; however, any terminology intended to be interpreted in any restricted manner will be overtly and specifically defined as such in this Detailed Description section.

[0020] FIG. 1 illustrates an example diagram of a system where a host server 100 supports collaborative metadata for work items in a content management system with an online collaboration environment for users 108 of the work items. The content management system can generally be a cloud-based service.

[0021] The client devices 102 can be any system and/or device, and/or any combination of devices/systems that is able to establish a connection, including wired, wireless, cellular connections with another device, a server and/or other systems such as host server 100. Client devices 102 will typically include a display and/or other output functionalities to present information and data exchanged between or among the devices 102 and/or the host server 100.

[0022] For example, the client devices 102 can include mobile, hand held or portable devices or non-portable devices and can be any of, but not limited to, a server desktop, a desktop computer, a computer cluster, or portable devices including, a notebook, a laptop computer, a handheld computer, a palmtop computer, a mobile phone, a cell phone, a smart phone, a PDA, a Blackberry device, a Treo, a handheld
tablet (e.g. an iPad, a Galaxy, Xoom Tablet, etc.), a tablet PC, a thin-client, a hand held console, a hand held gaming device or console, an iPhone, and/or any other portable, mobile, hand held devices, etc. In one embodiment, the client devices 102 and host server 100 are coupled via a network 106. In some embodiments, the devices 102 and host server 100 may be directly connected to one another.

[0023] The input mechanism on client devices 102 can include touch screen keypad (including single touch, multi-touch, gesture sensing in 2D or 3D, etc.), a physical keypad, a mouse, a pointer, a track pad, motion detector (e.g., including 1-axis, 2-axis, 3-axis accelerometer, etc.), a light sensor, capacitance sensor, resistance sensor, temperature sensor, proximity sensor, a piezoelectric device, device orientation detector (e.g., electronic compass, tilt sensor, rotation sensor, gyroscope, accelerometer), or a combination of the above.

[0024] Signals received or detected indicating user activity at client devices 102 through one or more of the above input mechanism, or others, can be used in the disclosed technology by various users or collaborators (e.g., collaborators 108) for accessing, through network 106, a web-based content management system with a collaboration environment or online collaboration platform (e.g., hosted by the host server 100).

[0025] The collaboration platform or environment hosts workspaces with work items stored in the data repository 130 that one or more users can access (e.g., view, edit, update, revise, comment, add to discussions, download, preview, tag, or otherwise manipulate, etc.). A work item can generally include any type of digital or electronic content that can be viewed or accessed via an electronic device (e.g., device 102). The digital content can include .pdf files, .doc, slides (e.g., Powerpoint slides), images, audio files, multimedia content, web pages, blogs, etc.

[0026] The data repository 130 is a database that can be managed by a database management system (DBMS), for example but not limited to, Oracle, DB2, Microsoft Access, Microsoft SQL Server, PostgreSQL, MySQL, FileMaker, etc. The data repository 130 can be implemented via object-oriented technology and/or via text files, and can be managed by a distributed database management system, an object-
oriented database management system (OODBMS) (e.g., ConceptBase, FastDB Main Memory Database Management System, JDOInstruments, ObjectDB, etc.), an object-relational database management system (ORDBMS) (e.g., Informix, OpenLink Virtuoso, VMDS, etc.), a file system, and/or any other convenient or known database management package.

[0027] A workspace can generally refer to any grouping of a set of digital content in the collaboration platform. In general, the content management system permits a user to group stored files in a hierarchical manner, such that a workspace made up of a group of files can be contained within another workspace, such as a folder. The grouping can be created, identified, or specified by a user or through other means. This user may be a creator user or administrative user, for example. The workspace can also include an online discussion area for collaborators to engage in an online discussion.

[0028] In general, a workspace can be associated with a set of users or collaborators (e.g., collaborators 108) who have access to the content included therein. The levels of access (e.g., based on permissions or rules) of each user or collaborator to access the content in a given workspace may be the same or may vary among the users. Each user may have their own set of access rights to every piece of content in the workspace, or each user may have different access rights to different pieces of content. Access rights may be specified by a user associated with a work space and/or a user who created/uploaded a particular piece of content to the workspace, or any other designated user or collaborator. In one embodiment, access rights can include permission to view and/or edit metadata or attributes associated with a work item.

[0029] In general, the collaboration platform allows multiple users or collaborators to access or collaborate efforts on work items such that each user can see, remotely, edits, revisions, comments, or annotations being made to specific work items through their own user devices. For example, a user can upload a document to a work space for other users to access (e.g., for viewing, editing, commenting, discussing, signing-off, or otherwise manipulating). The user can log in to the online platform and upload the document (or any other type of work item) to an existing work space or to a new work
space. The document can be shared with existing users or collaborators in a workspace.

[0030] A diagrammatic illustration of the online collaboration environment and the relationships between workspaces and users/collaborators are illustrated with further reference to the example of FIG. 2.

[0031] In one embodiment, discussions among collaborators of a workspace or folder can be linked to the particular workspace or folder, and collaborators can create topics for discussion and comment on those topics.

[0032] Functions and techniques disclosed for implementing collaborative metadata in the web-based content management system can be performed by the host server 100. Functions and techniques performed by the host server 100 and the related components therein are described below, respectively, in detail with further reference to the example of FIG. 3.

[0033] In one embodiment, client devices 102 communicate with the host server 100 over network 106. In general, network 106, over which the client devices 102 and the host server 100 communicate, may be a cellular network, a telephonic network, an open network, such as the Internet, or a private network, such as an intranet and/or the extranet, or any combination thereof. For example, the Internet can provide file transfer, remote log in, email, news, RSS, cloud-based services, instant messaging, visual voicemail, push mail, VoIP, and other services through any known or convenient protocol, such as, but is not limited to the TCP/IP protocol, Open System Interconnections (OSI), FTP, UPnP, iSCSI, NSF, ISDN, PDH, RS-232, SDH, SONET, etc.

[0034] The network 106 can be any collection of distinct networks operating wholly or partially in conjunction to provide connectivity to the client devices 102 and the host server 100 and may appear as one or more networks to the serviced systems and devices. In one embodiment, communications to and from the client devices 102 can be achieved by, an open network, such as the Internet, or a private network, such as an intranet and/or the extranet. In one embodiment, communications can be achieved by
a secure communications protocol, such as secure sockets layer (SSL), or transport layer security (TLS).

[0035] In addition, communications can be achieved via one or more networks, such as, but are not limited to, one or more of WiMax, a Local Area Network (LAN), Wireless Local Area Network (WLAN), a Personal area network (PAN), a Campus area network (CAN), a Metropolitan area network (MAN), a Wide area network (WAN), a Wireless wide area network (WWAN), enabled with technologies such as, by way of example, Global System for Mobile Communications (GSM), Personal Communications Service (PCS), Digital Advanced Mobile Phone Service (D-Amps), Bluetooth, Wi-Fi, Fixed Wireless Data, 2G, 2.5G, 3G, 4G, IMT-Advanced, pre-4G, 3G LTE, 3GPP LTE, LTE Advanced, mobile WiMax, WiMax 2, WirelessMAN-Advanced networks, enhanced data rates for GSM evolution (EDGE), General packet radio service (GPRS), enhanced GPRS, iBurst, UMTS, HSPDA, HSUPA, HSPA, UMTS-TDD, 1xRTT, EV-DO, messaging protocols such as, TCP/IP, SMS, MMS, extensible messaging and presence protocol (XMPP), real time messaging protocol (RTMP), instant messaging and presence protocol (IMPP), instant messaging, USSD, IRC, or any other wireless data networks or messaging protocols.

[0036] FIG. 2 depicts an example diagram of a web-based or online collaboration platform deployed in an enterprise or other organizational setting 250 for organizing workspaces 205, 225, 245 which include work items 215, 235, 255 and for providing a discussion workspace area 217, 237, 257 linked to the respective workspaces 205, 225, 245.

[0037] The web-based platform for collaborating on projects or jointly working on documents can be used by individual users and shared among collaborators. In addition, the collaboration platform can be deployed in an organized setting including but not limited to, a company (e.g., an enterprise setting), a department in a company, an academic institution, a department in an academic institution, a class or course setting, or any other types of organizations or organized setting.

[0038] When deployed in an organizational setting, multiple workspaces (e.g., workspace A, B C) can be created to support different projects or a variety of work...
flows. Each workspace can have its own associated work items. For example, work
space A 205 and discussion workspace 217 can be associated with work items 215,
work space B 225 and discussion workspace 237 can be associated with work items
235, and work space N 245 and discussion workspace 257 can be associated with work
items 255. The work items 215, 235, and 255 may be unique to each work space but
need not be. For example, a particular document can be associated with only one work
space (e.g., work space A 205) or it may be associated with multiple work spaces (e.g.,
work space A 205 and work space B 225, etc.).

[0039] In general, each work space has a set of users or collaborators associated
with it. For example, work space A 205 is associated with multiple users or collaborators
206. In some instances, work spaces deployed in an enterprise may be department
specific. For example, work space B may be associated with department 210 and some
users shown as example user A 208, and workspace N 245 can be associated with
departments 212 and 216 and users shown as example user B 214.

[0040] Each user associated with a work space can generally access the work
items associated with the work space. The level of access will depend on permissions
associated with the specific work space, and/or with a specific work item. Permissions
can be set for the work space or set individually on a per work item basis. For example,
the creator of a work space (e.g., one of user A 208 who creates work space B) can set
one permission setting applicable to all work items 235 for other associated users
and/or users associated with the affiliate department 210, for example. Creator user A
208 may also set different permission settings for each work item, which may be the
same for different users, or varying for different users.

[0041] In one embodiment, a first type of permission level, e.g. an editor, can allow
a user to have full read and write access to a workspace such that the user can view
and download contents of the workspace as well as upload new content to the
workspace. A second type of permission level, e.g. a viewer, can allow a user to have
full read access to a workspace such that the user can view and download contents of
the workspace but not upload or edit contents of the workspace. A third type of
permission level, e.g. an uploader, can allow a user to have limited write access to
contents of a workspace such that the user can see items in the workspace but not
download or view the items, while being permitted to upload new content to the workspace.

[0042] In one embodiment, the ability of a user associated with a workspace to
contribute to a discussion workspace linked to that workspace or to invite others to join
the workspace can be tied to the permission level of the user. For instance, an editor
may be permitted to participate in the discussion workspace and invite other
collaborators, while a viewer may only be allowed to participate in the discussion
workspace, and an uploader may not be permitted to perform either action.
Alternatively, separate discussion permission and/or invitation permission can be
assigned by a creator or administrator of a workspace to individuals associated with the
workspace. In some instances, discussion permission and/or invitation permission can
be associated with the workspace or the items in the workspace or can be based upon
any other criteria.

[0043] FIG. 3 shows a block diagram of an example host server 100 of a web-
based collaboration environment that supports collaborative metadata for work items in
the collaboration environment. Collaborative metadata refers to when one or more
collaborators of a workspace or folder are given the ability to review metadata assigned
to a work item in the folder and to add or edit metadata associated with the work item.
In some embodiments, all collaborators are permitted to review and/or edit metadata
associated with a work item, while in other embodiments, collaborators must be given
metadata access rights before being permitted to do so. Because collaborators can
add and/or edit metadata of a work item, a user is not required to provide any metadata
before uploading the work item to the online content management system.

[0044] The host server 100 of the web-based or online content management
system with a collaboration environment can include, for example, a network interface
302, an attribute creation engine 310, an attribute database 320, a metadata request
module 330, a metadata tracker module 340, a search engine 350, a metadata
recommendation engine 360, and a metadata mapping engine 370. The attribute
creation engine 310 can include an account tracking module 315.
The network interface 302 can be a networking module that enables the host server 100 to mediate data in a network with an entity that is external to the host server 100, through any known and/or convenient communications protocol supported by the host and the external entity. The network interface 302 can include one or more of a network adaptor card, a wireless network interface card (e.g., SMS interface, WiFi interface, interfaces for various generations of mobile communication standards including but not limited to 1G, 2G, 3G, 3.5G, 4G, LTE, etc.,) Bluetooth, a router, an access point, a wireless router, a switch, a multilayer switch, a protocol converter, a gateway, a bridge, bridge router, a hub, a digital media receiver, and/or a repeater.

As used herein, a "module," "a manager," a "handler," a "detector," an "interface," or an "engine" includes a general purpose, dedicated or shared processor and, typically, firmware or software modules that are executed by the processor. Depending upon implementation-specific or other considerations, the module, manager, handler, or engine can be centralized or its functionality distributed. The module, manager, handler, or engine can include general or special purpose hardware, firmware, or software embodied in a computer-readable (storage) medium for execution by the processor. As used herein, a computer-readable medium or computer-readable storage medium is intended to include all media that are statutory (e.g., in the United States, under 35 U.S.C. 101), and to specifically exclude all media that are non-statutory in nature to the extent that the exclusion is necessary for a claim that includes the computer-readable (storage) medium to be valid. Known statutory computer-readable media include hardware (e.g., registers, random access memory (RAM), non-volatile (NV) storage, to name a few), but may or may not be limited to hardware.

One embodiment of the host server 100 includes an attribute creation engine 310 that allows an administrator of a workspace or a user authorized by the administrator to create and manage a list of metadata attributes that is accessible enterprise-wide to the administrator's managed user accounts. By restricting the creation and maintenance of enterprise-wide metadata to the administrator, metadata terms can be made consistent across the account. In one embodiment, during the process of creating an attribute, the attribute creation engine 310 prompts the
administrator to provide an attribute name and to select a type for the attribute. The attribute type gives a user an indication of the format to include when providing metadata information for a particular work item or file. A type can include, for example, a free form text field, a pick list, date, or time. Additional information such as the settings for an attribute can also be requested. For example, if the type were a date field, the settings can include a minimum and a maximum date range. The additional information can also include a description for the attribute to help the end user understand what is being requested. An example user interface for creating an attribute is shown in FIG. 4.

[0048] In one embodiment, attributes can be arranged into sets by the administrator through the attribute creation engine 310. An attribute set is a grouping of attributes that can be easily applied to a work item to ensure that the attributes requested for work items or files across an account is consistent. For example, an attribute set for legal contracts can be created with the name 'legal contract attribute set'. In one instance, the legal contract set can include attributes such as drafting attorney name, contract start date, and parties to the contract. Then the legal contract attribute set can be applied to a workspace or folder intended to organize legal contracts so that any work items placed in the folder will automatically request metadata for the attributes in the legal contract attribute set from the person who uploads the file to the folder or from a collaborator of the folder who accesses the folder after the work item has been uploaded.

[0049] Once the attributes and/or attribute sets have been created, they are stored in the database 320. Only the administrator or a user authorized by the administrator is permitted to create, modify, or delete enterprise-wide attributes. The database 320 also stores the metadata for each work item stored in the web-based content management system that corresponds to the attributes and/or attribute sets corresponding to the work item. In one embodiment, the database 320 can be made up of several separate databases. In one embodiment, the database 320 can be external to the host server 100.
The attribute creation engine 310 can include an account tracking module 315 that applies certain attributes and/or attribute sets created by an administrator only to the administrator's accounts. Each administrator can set up his own list of attributes and attribute sets to be used within the administrator's own account(s) that are separate from one or more accounts that the administrator manages for a group of users. In one embodiment, the account tracking module 315 can also maintain a list of the users authorized by the administrator of an account to create and manage the attribute and attribute sets for the managed account(s).

Because the creator of a folder knows the kind of information that will likely be in the work items stored in the folder, in one embodiment, the metadata request module 330 prompts the creator of each folder for attributes and/or attribute sets to be requested for all work items that are stored in that folder. The metadata request module 330 also requests default values for the attributes and/or attribute sets that the creator selects. FIG. 5 shows an example user interface used by the metadata request module 330 to request attributes for a new folder. Child folders that are created in a parent folder that has already been assigned attributes and/or attribute sets inherit the same attributes and/or attribute sets upon creation. Similarly, the default values for the attributes are also inherited from the parent folder. However, the owner or creator of the child folder can modify the attributes and/or attributes sets associated with the child folder.

In one embodiment, the metadata request module 330 prompts a user who uploads a file to a particular folder to provide corresponding metadata for the attributes and/or attribute sets that have been assigned to that folder by the creator of the folder. The user can provide all, some, or none of the requested metadata information. Additionally or alternatively, the user can provide metadata for any attribute, even if it hasn't been designated by the folder creator as long as that attribute has been created by the administrator so that it exists in the attribute database 320. In one embodiment, the user can provide incomplete metadata information or no metadata information at all for a file. If incomplete or no metadata information is provided by the user uploading the file, the user is still permitted to upload the file. Then the metadata tracker module
340 will prompt any collaborator of the folder who subsequently accesses the folder to provide the missing metadata information for that file and any other files in the folder that have missing metadata information. In one embodiment, only authorized collaborators are requested to provide missing metadata. FIG. 6 shows an example user interface used by the metadata tracker module 340 to request metadata.

[0053] The search engine 350 can be used by a user of the online collaboration environment to search for and sort work items that have been tagged with a particular attribute term. Additionally or alternatively, work items can be searched for and sorted by two or more terms that are related, for example, all work items that are tagged with customer code = 0010 AND sales rep = Jim. An example user interface for searching using metadata is shown in FIG. 7. A user can enter, edit, and/or add metadata search terms, and the search engine 350 can search for work items within the account that have been appropriately tagged.

[0054] One embodiment of the host server 100 includes a metadata recommendation engine 360 that can recommend metadata to a user uploading a file to the online content management system. In one embodiment, the metadata recommendation engine 360 can base the recommendations on other metadata terms in the folder to which the document is uploaded. Alternatively, or additionally, the metadata recommendation engine 360 can base the recommendations on previous metadata terms that have been entered by the uploading user. In one embodiment, the metadata recommendation engine 360 can analyze the document for the use of substantive words or phrases having a minimum density, index and rank the content of the document based upon semantic analysis, or use any other metadata determination algorithm to determine the metadata terms to recommend to the user.

[0055] The host server 100 performs cloud-based enterprise content management services (ECM). In one embodiment, the host server 100 can connect with other client on-premise ECMs with traditional content platforms, for example, SharePoint or Documentum, to synchronize or transfer data to and from the host server 100 or when migrating content between the on-premise ECM and the host server 100. One embodiment of the host server 100 includes a metadata mapping engine 370 that maps
metadata fields between files stored on the host server 100 and the on-premise ECM. Thus, data synchronized between the host server 100 and a client's other ECM, for example, SharePoint, can contain the same or similar metadata.

[0056] FIG. 8 depicts a flow diagram illustrating an example process of creating metadata attributes by an administrator. FIG. 4 shows an example user interface that shows some created attribute sets, attributes, attribute types, and attribute settings.

[0057] At block 810, the system requests and receives a name for the metadata attribute from the administrator of one or more accounts on the web-based content management system. Then at block 815, the system requests and receives a type for the attribute. Examples of metadata attribute types include, but are not limited to, free form text field, time, date, and list with a box that allows for multiple selections.

[0058] At block 820, the system requests and receives additional settings for the metadata attribute. For example, if the type of attribute were a date field, the settings could indicate a minimum and a maximum data range. The settings can also include a description to explain to the end user the type of metadata information that is being requested by the system.

[0059] FIG. 9 depicts a flow diagram illustrating an example process of creating metadata attribute sets by an administrator. At block 910, the system requests and receives a name for the metadata attribute set from the administrator of one or more accounts on the content management system. Then at block 915, the system requests and receives the metadata attributes for the set from the administrator.

[0060] At decision block 920, the system determines if there are more metadata attributes to be included in the set. If the administrator indicates that there are more attributes (block 920 - Yes) the process returns to block 915. If the administrator indicates that there are no more attributes to be included (block 920 - No), the process ends at block 999.

[0061] FIG. 10 depicts a flow diagram illustrating an example process of creating a new folder in the web-based content management system.
At decision block 1005, the system determines if there is a request to create a new folder. If there is no request (block 1005 - No), the process remains at decision block 1005 until there is a request. If there is a request (block 1005 - Yes), at block 1010, the system requests and receives from the creator of the folder metadata attribute names to be requested for work items uploaded to the folder.

Then at block 1015, the system requests and receives default values, if any, for the attributes from the folder creator. For example, one metadata attribute that can be assigned to a legal folder is 'client name', and a default value for 'client name' can be Company ABC if all of the work items in the legal folder pertain to Company ABC.

At block 1020, the system requests and receives from the folder creator information about whether the given default metadata are editable. If the folder creator indicates that the default metadata for an attribute is not editable, neither collaborators of the folder nor the user who uploads a work item to the folder is permitted to change the metadata for the attribute for the work item from the default value.

FIG. 5 shows an example user interface for establishing metadata attribute information for a new folder in the online content management system.

FIG. 11 depicts a flow diagram illustrating an example process of uploading a file to the online content management system. At decision block 1105, the system determines if a file upload request has been received from a user. An upload request can be made by using a user interface to the online content management system, using email, or through an application programming interface (API), for example. If no file upload request has been received (block 1105 - No), the process remains at decision block 1105 until there is a request. If a file upload request has been received (block 1105 - Yes), at block 1107, the system requests metadata from the user for the attributes associated with the folder that were selected by the folder creator.

Then at block 1109, the system receives metadata, if any, from the user for the selected file attributes. The user is not required to provide metadata for the file before uploading a file to the online content management system. At block 1110, the
system uploads the file, even if the user has not provided any metadata for the required file attributes.

[0068] Then at block 1115, the system analyzes the file to determine metadata recommendations. At block 1120, the system recommends the determined metadata for the file to the user. At block 1125, the system receives the user's acceptance of any of the recommended metadata selections. The user does not have to accept any of the recommended metadata.

[0069] FIG. 12 depicts a flow diagram illustrating an example process of a collaborator entering a workspace or folder in the online content management system. At decision block 1205, the system determines if a collaborator is accessing a workspace. If no collaborator is accessing a workspace (block 1205 - No), the process remains at decision block 1205 until a collaborator accesses a workspace.

[0070] If a collaborator access a workspace (block 1205 - Yes), at decision block 1210 the system determines if any files or work items are missing metadata for the attributes selected by the workspace creator for the work items uploaded to the workspace. If there are no files missing metadata (block 1210 - No), the process ends at block 1299.

[0071] If there are files in the workspace that are missing metadata (block 1210 — Yes), at decision block 1215, the system determines if the collaborator accessing the workspace is permitted to add metadata. If the collaborator is not permitted to add metadata (block 1215 - No), the process ends at block 1299.

[0072] If the collaborator is permitted to add metadata (block 1215 - Yes), at block 1220, the system displays a notice that metadata is needed, the files that need metadata, and the attributes for which metadata is missing for those files. In one embodiment, the system can also permit the collaborator to add metadata for optional attributes not selected by the folder creator, as long as the optional attribute has been created by the administrator.
[0073] Then at decision block 1225, the system determines if a file has been selected by the collaborator to add metadata. If the collaborator does not select a file for adding metadata (block 1225 - No), the process ends at block 1299.

[0074] If the collaborator selects a file (block 1225 - Yes), at block 1230 the system receives the metadata for the file. Then at block 1235, the system updates the metadata database with the new metadata.

[0075] FIG. 13 shows a diagrammatic representation of a machine 1300 in the example form of a computer system within which a set of instructions, for causing the machine to perform any one or more of the methodologies discussed herein, may be executed.

[0076] In alternative embodiments, the machine operates as a standalone device or may be connected (e.g., networked) to other machines. In a networked deployment, the machine may operate in the capacity of a server or a client machine in a client-server network environment, or as a peer machine in a peer-to-peer (or distributed) network environment.

[0077] The machine may be a server computer, a client computer, a personal computer (PC), a user device, a tablet PC, a laptop computer, a set-top box (STB), a personal digital assistant (PDA), a cellular telephone, an iPhone, an iPad, a Blackberry, a processor, a telephone, a web appliance, a network router, switch or bridge, a console, a hand-held console, a (hand-held) gaming device, a music player, any portable, mobile, hand-held device, or any machine capable of executing a set of instructions (sequential or otherwise) that specify actions to be taken by that machine.

[0078] While the machine-readable medium or machine-readable storage medium is shown in an exemplary embodiment to be a single medium, the term "machine-readable medium" and "machine-readable storage medium" should be taken to include a single medium or multiple media (e.g., a centralized or distributed database, and/or associated caches and servers) that store the one or more sets of instructions. The term "machine-readable medium" and "machine-readable storage medium" shall also be taken to include any medium that is capable of storing, encoding or carrying a set of
instructions for execution by the machine and that cause the machine to perform any one or more of the methodologies of the presently disclosed technique and innovation.

[0079] In general, the routines executed to implement the embodiments of the disclosure, may be implemented as part of an operating system or a specific application, component, program, object, module or sequence of instructions referred to as "computer programs." The computer programs typically comprise one or more instructions set at various times in various memory and storage devices in a computer, and that, when read and executed by one or more processing units or processors in a computer, cause the computer to perform operations to execute elements involving the various aspects of the disclosure.

[0080] Moreover, while embodiments have been described in the context of fully functioning computers and computer systems, those skilled in the art will appreciate that the various embodiments are capable of being distributed as a program product in a variety of forms, and that the disclosure applies equally regardless of the particular type of machine or computer-readable media used to actually effect the distribution.

[0081] Further examples of machine-readable storage media, machine-readable media, or computer-readable (storage) media include, but are not limited to, recordable type media such as volatile and non-volatile memory devices, floppy and other removable disks, hard disk drives, optical disks (e.g., Compact Disk Read-Only Memory (CD ROMS), Digital Versatile Disks, (DVDs), etc.), among others, and transmission type media such as digital and analog communication links.

[0082] The network interface device enables the machine 1300 to mediate data in a network with an entity that is external to the host server, through any known and/or convenient communications protocol supported by the host and the external entity. The network interface device can include one or more of a network adaptor card, a wireless network interface card, a router, an access point, a wireless router, a switch, a multilayer switch, a protocol converter, a gateway, a bridge, bridge router, a hub, a digital media receiver, and/or a repeater.
[0083] The network interface device can include a firewall which can, in some embodiments, govern and/or manage permission to access/proxy data in a computer network, and track varying levels of trust between different machines and/or applications. The firewall can be any number of modules having any combination of hardware and/or software components able to enforce a predetermined set of access rights between a particular set of machines and applications, machines and machines, and/or applications and applications, for example, to regulate the flow of traffic and resource sharing between these varying entities. The firewall may additionally manage and/or have access to an access control list which details permissions including for example, the access and operation rights of an object by an individual, a machine, and/or an application, and the circumstances under which the permission rights stand.

[0084] Other network security functions can be performed or included in the functions of the firewall, can be, for example, but are not limited to, intrusion-prevention, intrusion detection, next-generation firewall, personal firewall, etc. without deviating from the novel art of this disclosure.

Conclusion

[0085] Unless the context clearly requires otherwise, throughout the description and the claims, the words "comprise," "comprising," and the like are to be construed in an inclusive sense (i.e., to say, in the sense of "including, but not limited to"), as opposed to an exclusive or exhaustive sense. As used herein, the terms "connected," "coupled," or any variant thereof means any connection or coupling, either direct or indirect, between two or more elements. Such a coupling or connection between the elements can be physical, logical, or a combination thereof. Additionally, the words "herein," "above," "below," and words of similar import, when used in this application, refer to this application as a whole and not to any particular portions of this application. Where the context permits, words in the above Detailed Description using the singular or plural number may also include the plural or singular number respectively. The word "or," in reference to a list of two or more items, covers all of the following interpretations of the word: any of the items in the list, all of the items in the list, and any combination of the items in the list.
The above Detailed Description of examples of the invention is not intended to be exhaustive or to limit the invention to the precise form disclosed above. While specific examples for the invention are described above for illustrative purposes, various equivalent modifications are possible within the scope of the invention, as those skilled in the relevant art will recognize. While processes or blocks are presented in a given order in this application, alternative implementations may perform routines having steps performed in a different order, or employ systems having blocks in a different order. Some processes or blocks may be deleted, moved, added, subdivided, combined, and/or modified to provide alternative or subcombinations. Also, while processes or blocks are at times shown as being performed in series, these processes or blocks may instead be performed or implemented in parallel, or may be performed at different times. Further any specific numbers noted herein are only examples. It is understood that alternative implementations may employ differing values or ranges.

The various illustrations and teachings provided herein can also be applied to systems other than the system described above. The elements and acts of the various examples described above can be combined to provide further implementations of the invention.

Any patents and applications and other references noted above, including any that may be listed in accompanying filing papers, are incorporated herein by reference. Aspects of the invention can be modified, if necessary, to employ the systems, functions, and concepts included in such references to provide further implementations of the invention.

These and other changes can be made to the invention in light of the above Detailed Description. While the above description describes certain examples of the invention, and describes the best mode contemplated, no matter how detailed the above appears in text, the invention can be practiced in many ways. Details of the system may vary considerably in its specific implementation, while still being encompassed by the invention disclosed herein. As noted above, particular terminology used when describing certain features or aspects of the invention should not be taken to imply that the terminology is being redefined herein to be restricted to any specific
characteristics, features, or aspects of the invention with which that terminology is associated. In general, the terms used in the following claims should not be construed to limit the invention to the specific examples disclosed in the specification, unless the above Detailed Description section explicitly defines such terms. Accordingly, the actual scope of the invention encompasses not only the disclosed examples, but also all equivalent ways of practicing or implementing the invention under the claims.

While certain aspects of the invention are presented below in certain claim forms, the applicant contemplates the various aspects of the invention in any number of claim forms. For example, while only one aspect of the invention is recited as a means-plus-function claim under 35 U.S.C. § 112, sixth paragraph, other aspects may likewise be embodied as a means-plus-function claim, or in other forms, such as being embodied in a computer-readable medium. (Any claims intended to be treated under 35 U.S.C. § 112, ¶ 6 will begin with the words "means for." ) Accordingly, the applicant reserves the right to add additional claims after filing the application to pursue such additional claim forms for other aspects of the invention.
CLAIMS

We claim:

[c1] 1. A method of implementing metadata in a storage system, the method comprising:
   permitting a user to upload a file to a folder in the storage system without requiring the user to enter metadata for the file;
   requesting collaborators of the folder to optionally provide metadata for the file when the collaborators access the folder; and
   enabling the collaborators to access the folder.

[c2] 2. The method of claim 1, wherein a creator of the folder selects preferred metadata attributes for the files uploaded to the folder.

[c3] 3. The method of claim 2, wherein the folder is part of an account on the storage system, and further wherein the selected preferred metadata attributes are limited to global metadata attributes identified by an administrator of the account.

[c4] 4. The method of claim 3, wherein the administrator defines one or more attribute sets, wherein each attribute set comprises a plurality of the global metadata attributes.

[c5] 5. The method of claim 4, wherein the creator of the folder can select metadata attribute sets for the files uploaded to the folder.

[c6] 6. The method of claim 3, wherein the creator of the folder is the administrator.

[c7] 7. The method of claim 3, further comprising requesting the creator of the folder to set a default value for one or more of the selected preferred metadata attributes.
8. The method of claim 3, wherein collaborators of the folder can tag the file with metadata for one or more of the global metadata attributes identified by the administrator even if the one or more global metadata attributes are not selected as preferred metadata attributes by the creator of the folder.

9. The method of claim 1, further comprising performing a search for files in an account based upon provided metadata.

10. The method of claim 1, wherein the collaborators can view and edit the metadata for any file in the folder.

11. The method of claim 1, further comprising:
   recommending metadata terms for the file to the user.

12. The method of claim 11, wherein the recommendation is based on other metadata used for other files in the folder.

13. The method of claim 11, wherein the recommendation is based on metadata that the user previously entered for other files.

14. The method of claim 11, wherein the recommendation is based on the content of the file.

15. The method of claim 1, further comprising:
   synchronizing files in a folder between the storage system and a different storage system; and
   mapping the metadata for the files stored in the storage system and the different storage system.
16. A method of implementing metadata in a storage system, the method comprising:

permitting an administrator of one or more accounts on the storage system to create a plurality of global metadata attributes to be used in the one or more accounts;

permitting a first user to create a workspace within one of the one or more accounts in the storage system and select a plurality of workspace metadata attributes from the plurality of global metadata attributes to be applied to every work item uploaded to the workspace; and

permitting a collaborator of the workspace to upload a work item to the workspace without requiring the collaborator to enter metadata for the selected workspace metadata attributes for the work item.

17. The method of claim 16, further comprising:

requesting collaborators of the workspace to enter metadata for the work item when the collaborators access the workspace, wherein collaborators of the workspace are not required to provide metadata for the work item before accessing the workspace.

18. The method of claim 17, wherein collaborators of the workspace can tag the work item with metadata for one or more of the global metadata attributes created by the administrator even if the one or more global metadata attributes are not selected as workspace metadata attributes for the workspace.

19. The method of claim 16, further comprising requesting the first user to set a default value for one or more of the selected workspace metadata attributes to be applied to every work item uploaded to the workspace.

20. The method of claim 16, wherein the administrator defines one or more attribute sets, wherein each attribute set comprises a plurality of the global metadata
attributes, and further wherein the first user can select one or more of the attribute sets to be applied to every work item uploaded to the workspace.

[c21] 21. The method of claim 16, wherein the collaborators can view and edit the metadata for any work item in the folder.

[c22] 22. The method of claim 16, further comprising synchronizing work items in a workspace between the storage system and a second storage system; and mapping the metadata for the work items stored in the storage system and the second storage system.

[c23] 23. The method of claim 16, further comprising performing a search for work items in one of the one or more accounts based upon metadata associated with the work items in the account.

[c24] 24. The method of claim 16, wherein the collaborators can view and edit the metadata for any work item in the workspace.

[c25] 25. The method of claim 16, further comprising: recommending metadata terms for the work item to the user.

[c26] 26. A system for implementing metadata in a storage system, the system comprising:

a metadata request module configured to prompt a user uploading a file to a folder in the storage system to provide metadata for selected attributes associated with the folder, wherein the user is not required to provide the metadata to upload the file; and

a metadata tracker module configured to prompt a collaborator of the folder who accesses the folder to provide missing metadata for the selected attributes for files within the folder,
wherein the collaborator is not required to provide the missing metadata before accessing the folder.

[c27] 27. The system of claim 26, further comprising an attribute creation engine configured to receive attributes and attribute sets from an administrator to be used with one or more accounts on the storage system.

[c28] 28. The system of claim 27, further comprising a database configured to store the attributes, attribute sets, and metadata.

[c29] 29. The system of claim 26, further comprising a search engine configured to search for files in the storage system using metadata associated with files.

[c30] 30. A system, comprising:
means for permitting a user to upload a file to a folder in the storage system without requiring the user to enter metadata for the file; and
means for requesting collaborators of the folder to enter metadata for the file when the collaborators access the folder, wherein collaborators of the folder are not required to provide metadata for the file before accessing the folder.
### All attributes

**Show:** All attributes

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<tr>
<td>Strategy</td>
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**Add new attribute set**

**FIG. 4**
Create New Folder

Select up to 5 attributes to be required for all content added to this folder. You can also set default values for these attributes.

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<th>Default Value</th>
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<td>Buyer</td>
<td>Marketing call center</td>
<td>✓</td>
</tr>
<tr>
<td>Buyer information attri...</td>
<td>Enter default or leave blank</td>
<td>✓</td>
</tr>
<tr>
<td>Caller name</td>
<td>Set default value</td>
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Add attribute

Save  Cancel

FIG. 5
**Marketing Active Work**

<table>
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<th>File Name</th>
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<th>Author</th>
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<td>Dec 6, 2010</td>
<td>Hellen Sullivan</td>
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<td>Nov 29, 2010</td>
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**Collaborators**

- jen@pin.net
- You
- Aaron Levy
- ashley@pin.net
- Ravi@pin.net

**Invitation**

Enter email addresses here

---

**FIG. 7**
FIG. 8

810 Request and receive attribute name
815 Request and receive type for attribute
820 Request and receive additional settings for attribute

FIG. 9

910 Request and receive attribute set name
915 Request and receive attributes for the set
920 Yes More attributes for set? No
999 End
FIG. 10
Upload file request?

Yes

Request metadata for attributes associated with the folder

Receive metadata, if any, for the file attributes

Upload file

Analyze file for metadata recommendations

Recommend metadata

Receive user's acceptance of any recommended metadata

FIG. 11
Collaborator accessing workspace?

Any files missing metadata?

Collaborator permitted to add metadata?

Display notice along with files needing metadata

File selected by collaborator?

Receive metadata for file

Update metadata database

End
FIG. 13
INTERNATIONAL SEARCH REPORT

A. CLASSIFICATION OF SUBJECT MATTER
INV. G06F17/30

According to International Patent Classification (IPC) onto both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched [classification system followed by classification symbols]
G06F

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
EPO-Internal, WPI Data

C. DOCUMENTS CONSIDERED TO BE RELEVANT

<table>
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Further documents are listed in the continuation of Box C.

See patent family annex.

* Special categories of cited documents:
  "A" document defining the general state of the art which is not considered to be of particular relevance
  "E" earlier application or patent but published on or after the international filing date
  "L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)
  "O" document referring to an oral disclosure, use, exhibition or other means
  "P" document published prior to the international filing date but later than the priority date claimed

*T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X" document of particular relevance; the claimed invention cannot be considered a novel or cannot be considered to involve an inventive step when the document is taken alone

"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"A" document member of the same patent family

Date of actual completion of the international search: 13 June 2012
Date of mailing of the international search report: 22/06/2012

Name and mailing address of the ISA:
European Patent Office, P.B. 5818 Patentlaan 2
NL - 2280 HV Rijswijk
Tel. (+31-31) 340-2040,
Fax: (+31-70) 340-3016

Authorized officer:
Si odmok, Woj ci ech

Form PCT/ISA/210 (second sheet) (April 2005)
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<td>BRIGITTE KERHERVE: &quot;Models for Metadata or Metamodels for Data?&quot;, 2ND IEEE METADATA CONFERENCE, 1 September 1997 (1997-09-01), pages 1-12, XP55017749, Silver Spring, Maryland, page 3, line 2-line 4; figures 1(b) top-down</td>
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