User Guide

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XEROX DocuShare®

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Getting started

What is DocuShare?

DocuShare is a web-based content management application that lets you use your web browser to store, view, edit, and share information with other users across the Internet. Anyone with access to your DocuShare site can download and upload documents, create and manage repositories called collections, and create calendars, discussions, and other site objects.

With DocuShare, you can:

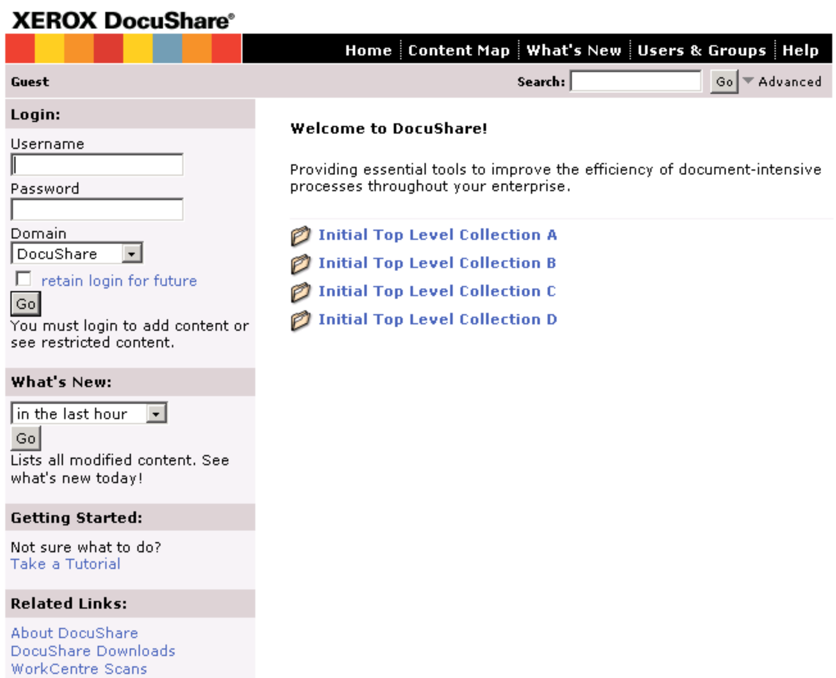
- Create and maintain your own account and workspace without the assistance of a web master or site administrator.
- Create collections in which to store documents, in their original format, and other types of objects.
- Control user access to collections, documents, and other site objects.
- Set up subscriptions for objects to be notified of any changes, additions, and deletions.
- Maintain multiple versions of a document, track its revision history, and lock a document to prevent simultaneous editing.
- View new content on your site.
- Search for objects and content on your site.
- Automate document routing tasks.

Accessing DocuShare

You access DocuShare through a web browser, such as Microsoft Internet Explorer or Netscape Navigator. When you connect to your DocuShare site, the DocuShare home page is the first page you see. From the home page you can access the content on your site and use the navigational links to get to DocuShare features.

When you first access DocuShare, you are a guest. To add content to the site, you must have a user account and be logged in. See Users and groups for more information.

Although your administrator can customize your site home page and different browsers may not display site elements the same, your home page should look similar to the example shown below.



The DocuShare home page includes these features:

- The site's top-level collections, which contain all the content on your site
- Login area
- What's New menu, which you can use to see the content that has been added or changed
- Help on getting started using DocuShare
- Links to related information
- Navigation links to other DocuShare pages: Home, Content Map, What's New, Users & Groups, Help
- Search area used to find objects in a collection or on the site

Navigating your site

The navigation bar at the top of your home page provides links to other DocuShare pages. These links also appear at the top of every page.

- Home—returns to the home page.
- Content Map—displays the objects on your site, based on your current location.
- What's New—lists the new and changed objects on your site.
- Users & Groups—provides links to listing, finding, and creating user and group accounts.
- Help—provides access to user guides, tutorials, and software downloads.
- Username—displays your user account properties. Your username displays after you log into DocuShare.
- Logout—logs you out of DocuShare. The link displays after you log in.
- My DocuShare—displays your personal home page, which includes your favorites and a personal collection and calendar. The link displays after you log in.
- My Tasks—shows the routing tasks assigned to you and the tasks you assigned. The link displays after you log in.
- Advanced—provides advanced search features.

In addition, most DocuShare pages include breadcrumbs, which you can use to navigate your site. The breadcrumbs either provide a path from the home page to your current location or list the last few pages you visited. You can click any link in the breadcrumbs to go to the page. For objects that appear in more than one location, multiple breadcrumbs are displayed when you click the triangle under **Location**.

Breadcrumbs for an open collection are shown below.

Location: Home > Initial Top Level Collection D > My Collection Listing
▲

Managing content

Your DocuShare site consists of collections and objects. A collection is like a folder; you use it to store other collections and objects. Objects can be documents, calendars, discussions, and URLs, and can appear in more than one collection.

You can create any number of collections on your DocuShare site. As the user who created the collection, you are the object's owner and you can control the type of access that users have to it. You can also assign a variety of properties to the collection, which allow you to provide information about the collection to other users and to customize it.

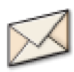
The figure below shows the contents of a collection titled **Training**. The collection contains a number of objects including: other collections, a document, a URL to another web site, and a calendar.

Each DocuShare object is identified by an icon. Table 1–1 shows the current DocuShare icons.

Table 1–1: DocuShare icons

DocuShare object and its icon			
	**User**—A registered DocuShare user.		**Group**—One or more DocuShare users, groups, or both.
	**Collection**—A container for storing DocuShare objects.		**Document**—A document stored on the DocuShare site. The icon can vary, depending on the document's file type.
	**Discussion**—An online forum where topics can be posted.		**Topic**—A posting to a discussion.

Table 1–1: DocuShare icons

DocuShare object and its icon			
	**Calendar**—An online monthly or weekly calendar.		**Event**—A calendar entry.
	**Mail Message**—An email message.		**Saved Query**—Saved search query terms that can be used for a search.
	**Subscription**—Notification after a change occurs to a specified DocuShare object.		**URL**—An Internet address for a web page.

Assigning properties to objects

Every DocuShare object has an assigned set of properties. For example, the properties for all objects include a title, a description, and an owner. Each object has a number of specific properties. For example, the sort order property is unique to collections and documents have a maximum versions property. Your DocuShare administrator also can create custom properties for use at your site. Properties allow you to search for objects.

Controlling access to objects

You can control the level of access users and groups have to DocuShare objects by assigning permissions. A collection and the objects it contains can have the same permissions, or each object in a collection can have its own permissions. DocuShare allows you to assign these access permissions to users and groups:

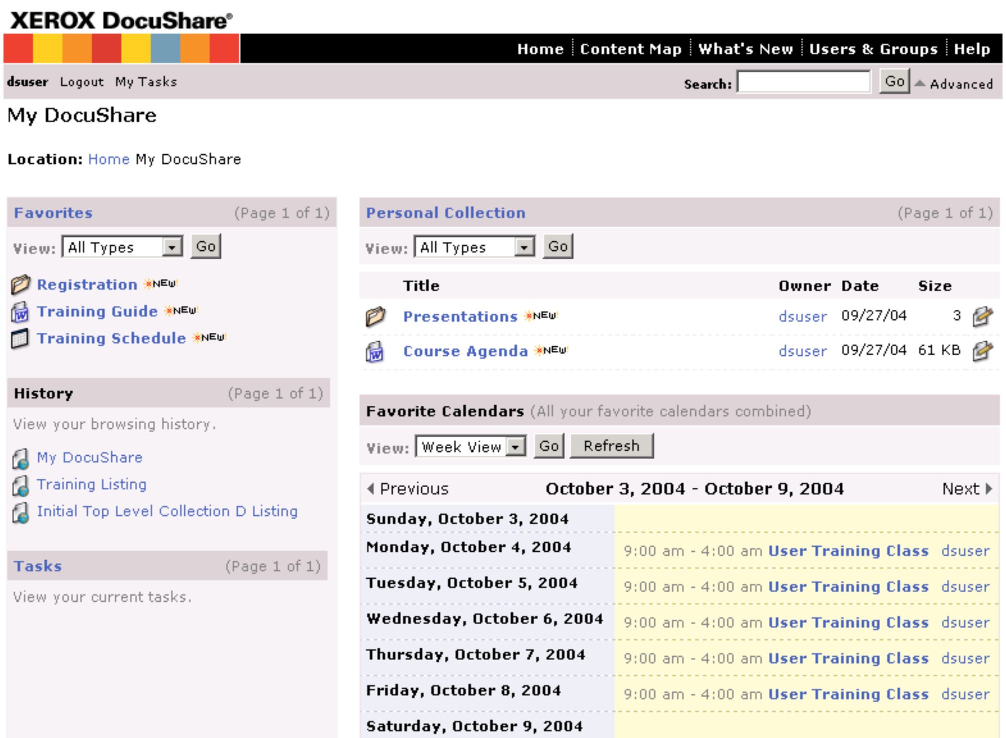
- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object's access permissions and owner.

Your DocuShare administrator has full access permissions to all of the objects on your site.

See Access permissions for an explanation of how to assign permissions to DocuShare objects.

Using My DocuShare

My DocuShare is a personalized home page that allows you to keep your favorite objects in a single location, store objects in a personal collection, view your browsing history and routing tasks, and manage the events from multiple favorite calendars. After logging into DocuShare, My DocuShare is accessible from the site home page and on the navigation bar. For information on how to set up and use My DocuShare, see My DocuShare.



Viewing new content on your site

From any page, you can display a list of the content that has been added or changed on your site. This lets you quickly find any new or recently changed object or content that might be of interest to you.

To find out what's new:

1. Do one of the following:
   - From the home page, select the time period you want under **What's New**. Click **Go**.
   - On the navigation bar, click **What's New**.

   DocuShare displays the list of content that has been added or changed.
2. To change the search query used to display the list of new or changed content, click the **Refine Query** button.

   The Refine Search page appears.
3. Change any of the search properties and click the **Search** button. Click a field name for a description of the property, or see Running an advanced search on page 10–4.

NOTE: If you are a guest user and you click **What's New** on the navigation bar, DocuShare lists the content that has been added or changed during the past 24 hours. If you are a logged-in user and you click **What's New** on the navigation bar, DocuShare lists the content that has been added or changed since you last clicked **What's New**.

Logging in and out

When you are not logged into DocuShare, you have guest access to the objects on your site. As a guest, you can browse and view content, unless access to it is restricted. Logging in enables you to add objects to your site and edit content.

To log into DocuShare:

1. Go to the DocuShare home page.
2. In the Login area, enter your registered username and password in the fields.

   Your password is case-sensitive.
3. If the **Domain** field appears, select your domain name.

NOTE: The **Domain** field appears if your site uses the LDAP (Lightweight Directory Access Protocol) add-on.

4. If the **retain login for future** checkbox appears, click it if you want to remain logged into DocuShare after you close and reopen your browser.

NOTE: The **retain login for future** checkbox appears if your administrator configured your site to use a feature called Persistent Login. For DocuShare to save your password, Internet Explorer's **Do not save encrypted pages to disk** option cannot be enabled. You can check the option's setting by selecting **Internet Options** from the **Tools** menu and then clicking the **Advanced** tab.

5. Click **Go**.

   Your username appears on the navigation bar, indicating that you are logged in.

To log out of DocuShare:

1. Do one of the following:
   - If Persistent Login is not enabled or you did not select the **retain login for future** checkbox, close the browser window.
   - If you selected the **retain login for future** checkbox, click the **Logout** link on the navigation bar.

DocuShare applications

DocuShare provides several applications to extend its functionality.

DocuShare Windows Client—A Windows-based application that seamlessly integrates DocuShare's document management features within your Windows desktop environment. From your Windows desktop you can easily access DocuShare content, drag and drop documents between DocuShare collections and your local and network drives, and open, edit, and save DocuShare documents from a variety of applications.

This application is included with DocuShare. To download it, go the Help page and click the **Downloads** tab.

DocuShare Outlook Client—A Windows-based application that enables you to conveniently manage and share information within Microsoft Outlook. Mapped DocuShare servers and collections appear as mail folders in your Inbox's Folder List. Open a folder to browse the contents of a collection, open documents for editing, and save new versions of documents. You can easily archive and share mail messages and attachments by dragging and dropping them to a collection. When you need to find information quickly, you can perform keyword searches.

This application must be purchased separately.

DocuShare Interact—An easy-to-use editor that enables any number of users to collaborate on a project using the web. An Interact page author creates an Interact page for a specific task or project. Using a web browser, you and other users can add, revise, and share page content. Interact pages can be used for any task that requires or would benefit from a collaborative effort, such as managing project tasks, co-authoring a document, and assigning and tracking action items.

This application must be purchased separately.

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Users and groups

About DocuShare accounts

By default, DocuShare is a community-maintained site, allowing anyone to create user and group accounts. Depending on the needs of your site, the DocuShare administrator can restrict account creation to logged-in users or to an administrator.

Additionally, if your site uses the LDAP (Lightweight Directory Access Protocol) add-on to manage user accounts, an administrator creates an account for you. To find out how your site is configured, see your DocuShare administrator.

DocuShare user accounts

When you first access DocuShare or until you log in, you are considered a guest user. As a guest, you can browse any unrestricted, or public, content. To add objects and edit content, you must have a DocuShare user account.

Creating a user account

If your site allows guest users to create accounts, you can create a user account. If account creation is restricted, an administrator will need to create a user account for you.

To create a user account:

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add User** tab.
3. On the Add User page, enter the following information:

   Username—The name you want to use to log into DocuShare. When creating objects, the username is specified as the object's owner.

   Password—The password you want to use to log into DocuShare. Your password is case-sensitive and must be typed as specified when logging in.

   Password Confirm—The same password that you typed in the **Password** field.

   Domain—An organization or other entity on your DocuShare site. This field appears if your site uses the LDAP add-on. The menu lists internal domains only.

   Last Name—Your last name. Users are listed on the DocuShare site by their first and last names.
4. Enter any optional information. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The Properties page for the user account appears.

   If DocuShare was unable to create a new account, a message page appears describing the problem.

Viewing user account properties

You can view the properties of any DocuShare user account. To view the properties, you do not need to be logged into DocuShare.

To view a user's account properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Users** in the **Show** field.
3. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
4. From the displayed list, click the name of the user whose properties you want to view.

   The Properties page appears, displaying the user's properties. Click a field name for a description of each property.

Changing your user account properties

You must be logged in as the user whose properties you want to change. You can view, but not change, another user's properties.

To change your user account properties:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Edit** tab.
3. Change the properties you want. Click a field name for a description of each property.
4. Click **Apply**.

   The Properties page appears displaying your new properties.

Changing your password

You must be logged in as the user whose password you want to change. You cannot change another user's password.

NOTE: If your site uses the LDAP add-on, you cannot change your password. Your administrator must change your password on the LDAP server.

To change your current password:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Change Password** tab.
3. Enter your current password in the **Old Password** field.
4. Enter your new password in the **New Password** field.
5. Enter your new password in the **New Password Confirm** field.
6. Click **Apply**.

Changing your username

You must be logged in as the user whose username you want to change. You cannot change another user's username.

NOTE: If your site uses the LDAP add-on, you cannot change your username. Your administrator must change your username on the LDAP server.

To change your username:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Change Username** tab.
3. Enter your current password in the **Password** field.
4. Enter a new username in the **Username** field.
5. Click **Apply**.

   The Properties page appears displaying your new username. The new name also appears on the navigation bar.

Changing your domain

If your site uses the LDAP add-on, you can change your domain to an internal domain on the DocuShare server. You must be logged in as the user whose domain you want to change; you cannot change another user's domain.

To change your current domain:

1. On the navigation bar, click your username.

   The Properties page appears.

2. Click the **Change Domain** tab.
3. Select a new domain from the **Domain** menu.
4. Click **Apply**.

Deleting a user account

Only an administrator can delete an existing user account. Contact your administrator if you want to delete your user account. If you have several user accounts, your administrator can combine any number of the accounts into one account.

DocuShare group accounts

A group consists of any number of DocuShare users, groups, or both. When your site includes groups, you can more easily manage access to collections and objects by assigning permissions to the group instead of to each user.

Creating a group

The DocuShare administrator can choose to allow logged-in users to create group accounts or to have group account creation under administrative control. If after logging into DocuShare, you do not see the **Add Group** tab on the Users and Groups Registry page, then an administrator will need to create a group for you.

To create a group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add Group** tab.
3. In the **Title** field, enter a name for the group. The name can contain spaces and punctuation marks, and can be identical to another group name.
4. In the **Domain** field, select a domain name. This field appears if your site uses the LDAP add-on. However, the menu lists internal domains only.
5. Enter any optional information. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The Change Membership page appears.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).

11. Click **Update**.

    The group members display on the Members page.

Viewing group properties

You can view the properties of any DocuShare group. To view the properties, you do not need to be logged into DocuShare.

To view a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the name of the group whose properties you want to view.

   The Properties page for the group appears. Click a field name for a description of each property.

Changing group properties

Depending on the **Change Membership** setting, either the logged-in owner of the group or a logged-in group member can change the properties of a group.

To change a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose properties you want to change.

   The Properties page for that group appears.
5. Click the **Edit** tab.
6. Change the properties that you want. Click a field name for a description of each property.
7. Click **Apply**.

Changing the members of a group

Depending on the **Change Membership** setting, either the logged-in owner of the group or a logged-in group member can add and remove members from the group.

To change a group's members:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose members you want to change.

   The Properties page for that group appears.
5. Click the **Members** tab.

   The Members page shows the current group members.
6. To change group members, click the **Change Membership** button.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
11. Click **Update**.

    The group members display on the Members page.

Changing the owner of a group

Only the logged-in owner of the group can change its owner. After changing the group's owner to another user, you will no longer be able to change the group's members and properties, unless **Change Membership** is set to **Members**.

To change the owner of an existing group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose owner you want to change.

   The Properties page for that group appears.
5. Click the **Edit** tab.
6. Click **Change Owner**.

   The Change Owner page appears.
7. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
8. Select a name from the **New Owner** field.
9. In the **Add Owner to Group** field, click **Yes** to add the new owner to the group.
10. Click **Update Owner**.

    The Properties page appears.

Changing the domain of a group

If your site uses the LDAP add-on, you can change a group's domain to an internal domain on the DocuShare server. You must be the logged-in owner of the group to change its domain.

NOTE: Changing the group's domain does not change a group member's domain, if one is used.

To change a group's domain:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter any part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose domain you want to change.

   The Properties page for that group appears.
5. Click the **Change Domain** tab.
6. Select a new domain from the **Domain** menu.
7. Click **Apply**.

Sending mail to group members

To easily communicate with a DocuShare group, you can send an email message to the group's members. The message is sent to each member whose user properties include an email address. To send email, your web browser must be correctly configured with a mail client, such as Microsoft Outlook or Netscape Communicator.

To send email to the members of a group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group that you want to send an email message to.

   The Properties page for that group appears.
5. Click the **Mail To** tab.
6. To write your message, click the **here** link.

Your browser launches an untitled message window with each group member's email address entered in the **To** field.

7. Compose your message and click **Send** to email the message to the members of the group.

Deleting a group

You can delete a group if you are the logged-in owner of the group.

To delete a group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter any part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group that you want to delete.

   The Properties page for that group appears.
5. At the bottom of the page, click the **Delete** button.

   The Confirm Delete page appears.
6. Click **Delete** to remove the group from your site.

   If you do not want to delete the group, click **Cancel**.

Finding and listing DocuShare accounts

From the List page, you can quickly search the users and groups registry to determine whether or not a user or group has an account on the DocuShare site. You also can list all of the user and group accounts registered on the site.

To search for a user or group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select the type of account you want to find in the **Show** field.
3. In the **Search** field, enter a complete name or part of a name.
4. Click **Go**.

   The search results display, listing the users, groups, or both who match the search text.

To list the accounts on your site:

1. On the List page, select the type of account you want to list in the **Show** field.
2. Click **Show All**.

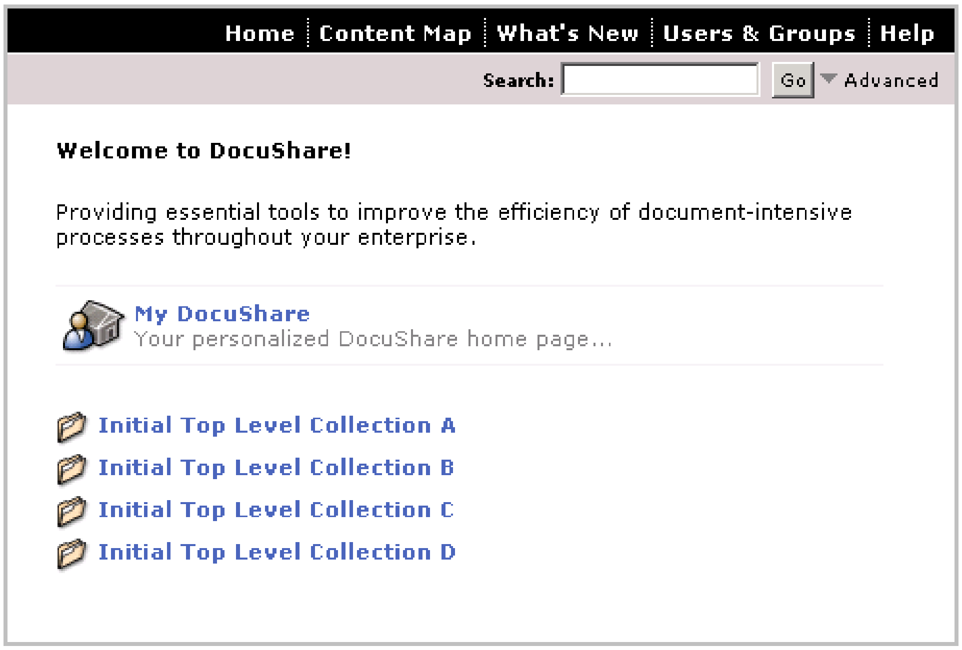
   The list of all registered accounts displays.

3

DocuShare collections

About collections

Your DocuShare site consists of any number of repositories, called collections, in which you store documents and other objects. The administrator determines which initial set of collections appears on the DocuShare home page. As a registered user, you can add collections to your DocuShare site.



Adding a collection

You can add a collection to another collection if you are logged in and have Writer access to the existing collection.

To add a collection:

1. Navigate to and open the collection to which you want to add a collection.

   The collection page opens showing all of the objects in the collection.
2. From the **Add** menu, select **Collection**.

   The Add Collection page appears.
3. In the **Title** field, enter a name for the collection. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Enter any optional information. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The Properties page for the collection appears, displaying information about the new collection.
6. You can click the collection name displayed in the **Location** breadcrumbs to open the collection.

To change the collection's access permissions, see Access permissions.

Viewing and changing collection properties

You do not need to be logged into DocuShare to view a collection's properties. However, only the logged-in owner of a collection or a logged-in user with Writer access to the collection can change the properties.

To view and change a collection's properties:

1. Locate the collection whose properties you want to view and change.
2. Do one of the following:
   - If the collection is open, click the **Edit Properties** link in the upper-right corner of the window.
   - If the collection is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the collection's title.

   The Properties page for the collection displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Changing the location of a collection

You can move a collection to another location or have the collection appear in several locations on your site. Although a collection can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a collection's location, you must be logged in and have Writer access to both the current and new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a collection to another collection. See Editing multiple objects in a collection on page 3–7.

To change a collection's location:

1. Open the collection that contains the collection whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the collection's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the collection's title. On the Properties page for the collection, click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the collection to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the collection to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the collection will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Properties page for the collection appears displaying the collection title(s) in which the collection now appears.

Editing multiple objects in a collection

When viewing an open collection, you can use the **Edit Selected** menu to perform a variety of tasks on one or more objects. For instance, you can add several collection objects to your favorites and copy and paste objects between collections.

To edit multiple collection objects:

1. Navigate to and open the collection.
2. Do one of the following:
   - To edit some of the objects, click the checkbox next to the objects you want.
   - To edit all of the objects, click the checkbox to the left of the **Type** column heading.
3. From the **Edit Selected** menu, select one of the following commands:
   - **Add to Favorites**—Add the object to **Favorites** on My DocuShare.
   - **Copy**—Copy the object to the clipboard.
   - **Paste**—Paste the object from the clipboard. Select the command after copying one or more objects to the clipboard.
   - **Delete**—Remove the object from your site.
   - **Rename**—Change the object's title.
   - **Change Location**—Add the object to another location.
   - **Change Owner**—Change the object's owner.

   A confirm window appears.
4. Click **Confirm** to continue. Depending on which command you selected, additional pages may appear.

NOTE: When using the **Change Location** command, if an object appears in more than one collection, only the current collection is listed in the **Selected Locations** field.

Deleting a collection

You can delete a collection on your DocuShare site if you are the logged-in owner of the collection or have Manager access to it. If the collection contains other objects, you can choose to delete the collection only or the collection and its contents. To delete the collection and its contents, you must be the owner of the objects in the collection or have Manager access permission to them.

NOTE: If you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. Your administrator can relocate orphaned objects in a collection so you can access them again.

To delete a collection:

1. Navigate to the collection that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the collection's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the collection's title. On the Properties page for the collection, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the collection, then you do not have Manager access to the object and cannot delete it.

3. From the **For collections, delete** menu, do one of the following:
   - Select **Collection and Contents** to delete the collection and all of the objects in it.
   - Select **Collection Only** to delete the collection, but not its contents.
4. Click **Delete** to remove the collection from your site.

   If you do not want to delete the collection, click **Cancel**.

Restoring a deleted collection

If you accidentally delete a collection, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted collection.

4

DocuShare documents

About documents

Using DocuShare, you can store, access, and manage documents created in a variety of popular formats. You add documents to DocuShare by uploading them from your computer or a network drive to a collection on your site. With the documents stored in a DocuShare collection, users connected to the network can use their browser to search for, view, edit, and download a document.

For document management, DocuShare supports version control through its check-out and check-in features. By default, DocuShare saves four versions of a document; you can change the number of versions DocuShare saves on a per-document basis. In addition, you can change a document's preferred version, which is the version that opens when users view, check out, and route the document from a collection. By default, a document's preferred version is its latest version.

Adding a document to a collection

You add a document to a collection by uploading it from a folder on your local drive or a network drive. The upload copies the document to the collection. Once a document is in a collection, it is available to others for viewing or collaborative work.

To add a document, you must be logged in and have Writer access to the collection.

To add a document to a collection:

1. Navigate to and open the collection to which you want to add the document.
2. From the **Add** menu, select **Document**.

   The Add Document page appears.
3. Enter the following information:

   Filename—The complete path and filename of the document you want to upload. You can click the Browse button to navigate to and select the document.

   If you enter the path and filename of a document that does not appear on the drive, DocuShare uploads an empty document.

   Title—The title of the document. The title should be short, but descriptive, and can contain spaces and punctuation marks.

   Max Versions—The maximum number of versions to save. When a new version of a document is saved to DocuShare, the oldest version is deleted, unless it is the preferred version.
4. Enter any optional information. Click a field name for a description of each property.
5. Click **Apply** to upload the document to the collection.

   The Properties page for the document appears, displaying information about the new document. If you chose to route the document, a Routing Slip appears. For information on how to use the Routing Slip, see Routing documents.

NOTE: DocuShare identifies each object on the site with a unique handle (for example, Document-37). Therefore, you can upload a document that has a name identical to a document stored in a collection.

Viewing and changing document properties

Any user can view the properties of a document. You can change a document’s properties if you are the logged-in owner of the document or a logged-in user with Writer access to the document.

To view and change a document’s properties:

1. Open the collection that contains the document whose properties you want to view and change.
2. Click the **Properties** icon that appears to the right of the document’s title.

   The Properties page for the document displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Changing the location of a document

You can move a document to another collection or have the document appear in several collections on your site. Moving a document eliminates the need to delete the document and then upload it again. Although a document can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a document's location, you must be logged in and have Writer access to both the document and the new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a document to another collection. See Editing multiple objects in a collection on page 3–7.

To change a document's location:

1. Navigate to and open the collection that contains the document that you want to move.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the document's title. On the Properties page for the document, click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field and click **Go**.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the document to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the document to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the document will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Locations page appears displaying the collection title(s) in which the document now appears.

Viewing a document

DocuShare provides a repository for your documents; your browser controls how a document is displayed. By design, browsers are able to handle several types of documents and files, such as HTML, GIF, and JPEG. However, for some documents, such as Microsoft Word and Excel, your browser launches a **helper application** (**viewer**) to run or display the document either outside or within the browser window. To play multimedia files, the browser uses a **plug-in**, which opens the file within the browser window.

Your browser is preconfigured to use specific helper applications and plug-ins. Generally, if you try to open a document or file that your browser does not recognize, it displays a window that guides you in finding the application to use for that type of file.

Unless access to a document is restricted, you can view the content of any document on your site.

To view the content of a document:

1. Navigate to and open the collection that contains the document you want to view.
2. Click the document title.
3. To return to the collection page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

NOTE: If you click the X in the top-right corner of the browser or select **Close** from the **File** menu, your browser closes and you lose your connection to the DocuShare site.

Viewing an HTML rendition of a document

DocuShare provides an HTML conversion feature that lets you view supported document types in HTML format. This feature eliminates the need to configure your browser to display certain document types. If a **View** icon appears to the right of a document's title, then you can view an HTML rendition of the document.

NOTE: The HTML conversion feature cannot convert documents that contain encrypted information.

To view an HTML rendition of a document:

1. Open the collection that contains the document you want to view.
2. Click the **View** icon that appears to the right of the document's title.

   DocuShare converts the document to HTML and displays the document.
3. Click the browser's **Back** button to return to the collection page.

Editing a document

DocuShare supports the complete development cycle of a document, allowing users to collaborate on a project. Document check-out and check-in ensures that only one user at a time edits a document. Version control maintains a user-specified number of document versions.

To edit a document and create a new version, you must be either the logged-in owner of the document or a logged-in user with Writer access to it. In addition, the document's **Add Versions** property must be set to **Allowed** (default setting).

NOTE: If DocuShare Windows Client is installed on your computer and you enabled the **Handle checkout from web browser** property in the DocuShare Client Properties window, the DocuShare Client Checkin Wizard displays after you edit and save the document. When using this feature, make sure DocuShare's URL in the browser is the same as the server's address in Windows Client. To check the server's address, right-click the server name and select **Properties**.

To edit a document:

1. Navigate to and open the collection that contains the document that you want to edit.
2. Click the **Check Out** icon that appears to the right of the document's title.

   The document opens in the browser window, or a window appears allowing you to open or download the document. When the document is checked out, it is locked, which prevents other users from editing it.
3. Edit the document.
4. Do one of the following:
   - If the document opened in the browser, click the **Back** button. Click **Yes** to save your edits.
   - If the document opened in its native editor, select **Save As** from the **File** menu.
5. In the **Save As** window, save the document to a location on your local drive.

   Do not change the name of the document.
6. On the collection page, click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
7. At the bottom of the page, click the **New Version** button.
8. On the Add Version page, click the **Browse** button.
9. Navigate to the location on your local drive in which you saved the edited document, select it, and click **Open**.

   The path to the document appears in the **Filename** field.

10. In the **Title** field, you can change the document title. By default, the new version is assigned the original document title.
11. Optionally, enter any comments in the **Version Comments** field.
12. For **Unlock Document**, click **No** if you do not want to unlock the document after adding the new version.
13. When a document version other than the latest is the preferred version, you can click **Yes** in the **Make This The Preferred Version** field to set this version as the preferred one. Otherwise, click **No** to not change the preferred version.
14. Click **Apply**.

Adding a new version of a document

You can add a new version of a document by uploading a document from a folder on your local drive or a network drive. To add a new version, you must either be the logged-in owner of the document or have Writer access to it. In addition, the document's **Add Versions** property must be set to **Allowed** (default setting).

To add a new version of a document:

1. Navigate to and open the collection that contains the document that you want to update with a new version.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **New Version** button.
4. On the Add Version page, click the **Browse** button.
5. Navigate to the location on your local drive that contains the document you want to add as a new version, select it, and click **Open**.

   The path to the document appears in the **Filename** field.
6. In the **Title** field, you can change the document title. By default, the new version is assigned the original document title.
7. Optionally, enter any comments in the **Version Comments** field.
8. If the previous version of the document was locked, the **Unlock Document** field appears. Click **No** if you do not want to unlock the document after adding the new version.
9. When a document version other than the latest is the preferred version, you can click **Yes** in the **Make This The Preferred Version** field to set this version as the preferred one. Otherwise, click **No** to not change the preferred version.
10. Click **Apply**.

Managing document versions

DocuShare's version control feature enables you to maintain a record of a document's history. For each version DocuShare saves, you can view the content, the date and time the version was added to the collection, the user who added the version, and any user-provided comment. You can also view and edit each version's properties and permissions, and route individual versions.

By default, DocuShare saves four versions of a document. You can change the default setting by changing the document's **Max Versions** property. See Viewing and changing document properties on page 4–4.

Viewing document versions

To view a document's version history:

1. Navigate to and open the collection that contains the document whose version history you want to view.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. Click the **Version History** tab.

   The page displays all saved versions of the document.
4. To view a specific version of the document, click its type or version number.
5. To return to the Version History page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

Changing the preferred version

By default, a document's preferred version is the latest version. When there is more than one version of a document, you can change the document's preferred version. This is the version of the document that opens when users view, check out, and route the document from a collection. However, users can route a specific document version from the document's Version History page.

DocuShare always saves the preferred version, regardless of the number of **Max Versions** specified.

To change a document's preferred version:

1. Display a document's Version History page.
2. Click **Change Preferred Version**.

   Radio buttons display next to each version and the **Use Latest Version** option appears.

3. Do one of the following:
   - To select one of the existing versions as the preferred version, click the radio button next to the version you want.
   - To always have the latest version of the document be the preferred version, click the radio button next to **Use Latest Version**.
4. Click **Apply**.

Viewing the renditions of a version

Each version of a document can consist of a number of renditions. A rendition is the version's display format, such as Microsoft Word, Adobe PDF, or HTML, and can be comprised of content files. For example, an HTML rendition of a particular document version would consist of the HTML file and several image files if the rendition contained graphics.

To view a version's renditions:

1. Display a document's Version History page.
2. To view the version renditions, click **Show Renditions**.

   The version renditions display and, if a rendition contains content files, those files display.
3. You can click a rendition or a content file to view it.
4. Click **Hide Renditions** to not view the renditions.

Viewing and changing version properties

Any user can view the properties of a version. You can change a version's properties if you are the logged-in owner of the version or a logged-in user with Writer access to the version.

To view and change a version's properties:

1. Display a document's Version History page.
2. Click the **Properties** icon that appears to the right of the version's title.

   The Properties page for the version displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

To change a version's access permissions, see Access permissions.

Locking a document

If you are the logged-in owner of the document or a logged-in user with Writer access to the document, you can lock it to keep other users from editing the document.

To lock a document:

1. Navigate to and open the collection that contains the document that you want to lock.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **Lock** button.

   On the View page, the **Locked By** property displays your name as the user who locked the document.
4. Return to the collection that contains the document by clicking the collection title displayed after **Appears In**. The **Locked** icon appears to the right of the document title.

   Users can view the document, but they cannot check out the document for editing.

Unlocking a document

If you do not want to add a new version of a document to a collection, you can unlock a locked document. To unlock a document and allow users to edit the document, you must be the logged-in owner of the document or a logged-in user with Writer access to it. A document is locked if a **Locked** icon appears to the right of the document's title.

To unlock a locked document:

1. Navigate to and open the collection that contains the document that you want to unlock.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **Unlock** button.

   On the View page, the **Locked By** property does not display a username.
4. Return to the collection that contains the document by clicking the collection title displayed after **Appears In**. The **Check Out** icon appears to the right of the document's title.

   Users can now check out the document for editing.

Downloading a document

You can download a document from a DocuShare collection to your computer. The download copies the document and keeps the original document in the collection.

To download a document:

1. Navigate to and open the collection that contains the document that you want to download.
2. Click the document that you want to download.

   The document opens.
3. From the **File** menu, select **Save As**.
4. Select a location on your computer where you want to save the document.
5. Click **Save**.

   A copy of the document downloads to your computer.
6. To return to the collection page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

Deleting a document

You can delete a document from a collection if you are the logged-in owner of the document or a logged-in user with Manager access to it.

To delete a document:

1. Open the collection that contains the document that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the document's title. On the Properties page for the document, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the document, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the document from your site.

   If you do not want to delete the document, click **Cancel**.

Restoring a deleted document

If you accidentally delete a document, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted document.

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Access permissions

About access permissions

Every DocuShare object has a set of associated permissions called its **access list**. Permissions are the access rights that a defined set of users and groups has to view, delete, or change a DocuShare object. The object's owner or any user with Manager access to the object can assign and change the permissions.

As the owner of the DocuShare objects that you add to your site, you can control the type of access users and groups have to those objects. When you add an object to a collection, you set the object's initial permissions. At any time you can change the users and groups who have access to the object and the type of access each user or group has.

DocuShare provides the following access permissions that you can assign to users and groups:

- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object's access permissions and owner.

In addition, you can control who can see an object in a search results list.

Viewing the access permissions of an object

As a guest user or a user with Reader access to an object, you can view the object's access permissions.

To view an object's access permissions:

1. Locate the object whose permissions you want to view.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for that object appears.
3. Click the **Permissions** tab.

   The Permissions page displays the object's access list, which includes the object's owner, the site administrator, and three DocuShare groups:

   Content Administrators—The registered users who have full access permissions to all of the objects on your DocuShare site.

   All Users and Guest—All registered DocuShare users and the guest user.

   All Users Except Guest—All registered DocuShare users.

Changing the access permissions of an object

You can change an object's access permissions if you are the logged-in owner of the object or a logged-in user with Manager access to the object.

To change an object's access permissions:

1. Locate the object whose permissions you want to change.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for that object appears.
3. Click the **Permissions** tab.

   The Permissions page for that object appears.
4. For **Search Available to**, click **Anyone** to allow guests and users to view the object in a search results list. Click **Access List Only** to allow only those accounts included in the object's access list to see the object in a search results list.
5. If you want to change the list of users and groups who have access to the object, click the **Change Access List** button.

   The Change Access List page appears.
6. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
7. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
8. In the **Possible Users/Groups** field, select the accounts to add to the access list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. In the **Selected Users/Groups** field, select any accounts that you want to remove from the access list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. Click **Update Access List**.

    The Permissions page appears, displaying the new access list.
11. Check the permission boxes you want for each user and group displayed in the access list.
12. Click **Apply**.

Changing the owner of an object

The default owner of an object is the user who initially created the object. You can change an object's owner if you are the logged-in owner of the object or a logged-in user with Manager access to the object.

NOTE: When you change the owner of a container or a document, only that object's owner is changed; the owners of the container's objects or the document versions are not changed.

To change the owner of an object:

1. Locate the object whose owner you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the object's title. From the **Edit Selected** menu, select **Change Owner**. On the confirmation page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the object's title. Click the **Permissions** tab and then click the **Change Owner** button.

   The Change Owner page appears.
3. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
   - To display your favorite user accounts, click **Show Favorites**.
4. Select a name from the **New Owner** field.
5. Click **Update Owner**.

   The Permissions page for the object appears, displaying the name of the new owner at the top of the access list. The new owner has Reader, Writer, and Manager permissions.

   The name of the previous owner remains in the access list.

Applying permissions to the objects in a container

When you change the access permissions of a collection, calendar, or discussion that includes objects, you can choose how to apply the container's permissions to its contents. You can choose to apply all of the permissions or only the changed permissions to either the container or the container and its contents.

You can change a container's access permissions if you are the logged-in owner of the container or a logged-in user with Manager access to it.

To apply a container's access permission to the objects in it:

1. Locate the container whose permissions you want to change.
2. Click the **Properties** icon that appears to the right of the container's title.

   The Properties page for that container appears, displaying the current properties.
3. Click the **Permissions** tab.

   The Permissions page for that container appears.
4. Make the changes you want to the access list.
5. For **Options**, select one of the following:
   - **Apply all permissions to**—Assigns all of the access permissions.
   - **Apply only changes to**—Assigns only the changed access permissions.
6. Select one of the following:
   - **This container only**—Applies the permissions to the container only. The permissions of the container's objects are not changed.
   - **This container and its objects, including same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers also are changed.
   - **This container and its objects, *excluding* same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers are **not** changed.
7. Click **Apply**.

Applying permissions to a document and its versions

Since each version of a document has its own access list, when you change a document's access permissions you can choose how you want to apply the changes to the document's versions. You can change a document's access permissions if you are the logged-in owner of the document or a logged-in user with Manager access to it.

To apply a document's access permission to its versions:

1. Locate the document whose permissions you want to change.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for that document appears, displaying the current properties.
3. Click the **Permissions** tab.

   The Permissions page for that document appears.
4. Make the changes you want to the access list.
5. For **Apply all permissions to**, select one of the following:
   - **This document and its versions**—Assigns the changed permissions to the document and all of its versions.
   - **This document only**—Assigns the changed permissions to the document only. The document and its versions will have different access permissions.
6. Click **Apply**.

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DocuShare calendars

About calendars

You can add a calendar to a collection to keep track of your appointments, meetings, and other activities. If you and a group of co-workers are responsible for a project, you can share a calendar to manage the tasks and schedules.

The entries you add to a calendar are called events. An event can occur all day or during a specified time period. In addition, an event can occur once or repeatedly, such as a weekly staff meeting or a class.

You can display a calendar in either month, week, or day view.

Month view

Month view displays an entire month with the current day highlighted. From the current month, you can click a link for the previous month and the next month. You can also display calendars for previous and following years.

The start time and title of each calendar event is shown on the date to which it was added.

Week view

Week view displays an entire week with the current day highlighted. From the current week, you can click a link for the previous week and the next week. You can also display calendars for previous and following years.

The duration, title, and owner of each event is shown on the date to which it was added.

Day view

Day view displays the current day. From the current day, you can click a link for the previous day and the next day. You can also display a day from another month or year.

The day view shows the duration, title, and owner of each event added to the date.

Adding a calendar

You can add a calendar to a collection if you are logged in and have Writer access to the collection.

To add a calendar to a collection:

1. Navigate to and open the collection to which you want to add a calendar.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **Calendar**.

   The Add Calendar page appears.

3. In the **Title** field, enter a name for the calendar. The name should be short, but descriptive, and can contain spaces and punctuation marks.

4. Enter any optional information. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The Properties page for the calendar appears, displaying information about the new calendar.

6. You can click the calendar name displayed in the **Location** breadcrumbs to open the calendar.

To change the calendar's access permissions, see Access permissions.

Changing the calendar view

When viewing a calendar, you can change among the three views.

To change the calendar view:

1. Navigate to and open the calendar.
2. From the **View** menu, select either **Month View**, **Week View**, or **Day View**.

Viewing and changing calendar properties

You do not need to be logged into DocuShare to view a calendar's properties. However, only the logged-in owner of a calendar or a logged-in user with Writer access to the calendar can change the calendar's properties.

To view and change a calendar's properties:

1. Locate the calendar whose properties you want to view and change.
2. Do one of the following:
   - If the calendar is open, click the **Edit Properties** link in the upper-right corner of the window.
   - If the calendar is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the calendar's title.

   The Properties page for the calendar displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Changing the location of a calendar

You can move a calendar to another collection or have the calendar appear in several collections on your site. Although a calendar can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a calendar's location, you must be logged in and have Writer access to both the calendar and the new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a calendar to another collection. See Editing multiple objects in a collection on page 3–7

To change a calendar's location:

1. Navigate to and open the collection that contains the calendar whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the calendar's title. On the Properties page for the calendar, click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the calendar to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the calendar to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the calendar will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Properties page for the calendar appears displaying the collection title(s) in which the calendar now appears.

Deleting a calendar

You can delete a calendar if you are the logged-in owner of the calendar or a logged-in user with Manager access to it. When you delete a calendar, all of the events in it are also deleted.

To delete a calendar:

1. Navigate to and open the collection that contains the calendar you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the calendar's title. On the Properties page for the calendar, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the calendar, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the calendar from your site.

   If you do not want to delete the calendar, click **Cancel**.

Restoring a deleted calendar

If you accidentally delete a calendar, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted calendar.

Adding an event to a calendar

You can add an event to a calendar if you are logged in and have Writer access to the calendar. You can set the event so that it occurs on a regular basis, such as every Monday or every two weeks.

To add a calendar event:

1. Open the calendar to which you want to add an event.
2. From the **Add** menu, select **Event**.

   The Add Event page appears.
3. In the **Title** field, enter a name for the event.
4. Optionally, enter a description of the event in the **Description** field.
5. In the **Date** field, select the date on which the event is to occur.
6. For **Time**, do one of the following:
   - Select **No Time** if the event is to occur all day.
   - Select the beginning and ending times if the event is to occur during a specified time period. Be sure to select **am** or **pm** as appropriate.
7. If the event is to occur on a regular basis, select the **Repeat** frequency and number of occurrences.
8. For **Initial Permissions**, select one of the following:
   - **Same as container** assigns the container's access permissions to the object.
   - **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object.
   - **Restricted to owner** assigns full access permissions only to you, the object's owner.
9. Click **Apply** to add the event to your calendar.

   The Properties page for the event appears, displaying information about the new event.
10. You can click the calendar name displayed in the **Location** breadcrumbs to open the calendar.

    The event you added appears in the calendar.

To change the event's access permissions, see Access permissions.

Viewing and changing calendar event properties

You can view and change the properties of a calendar event such as the title or time. If the event is recurring, the change is made to each event in the series. To change the properties, you must be the logged-in owner of the event or a logged-in user with Writer access to the event.

To view and change a calendar event's properties:

1. Navigate to and open the calendar that contains the event you want to view and change.
2. Click the title of the event.

   The Properties page for the event displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

Deleting a calendar event

You can delete a calendar event if you are the logged-in owner of the event or a logged-in user with Manager access to it. However, if the event is one of a recurring series, you need only Writer access to the event to delete it.

To delete a calendar event:

1. Navigate to and open the calendar that contains the event you want to delete.
2. Click the title of the event.

   The Properties page for the event appears.
3. At the bottom of the page, click the **Delete** button.
4. On the Confirm Delete page, do one of the following:
   - If the event is a single occurrence, click the **Delete** button.
   - If the event occurs more than once, click the **Delete All Events in This Series** button to delete all occurrences of the event from the calendar; click the **Delete Just This Event** button to delete the event from the date you selected.

NOTE: Your administrator can restore a deleted non-recurring single event or a deleted recurring event series. However, your administrator cannot restore a single event that was deleted from a recurring event series.

Changing the location of a calendar event

You can move an event to another calendar or have it appear in several calenders. To move an event, you must be logged in and have Writer access to both the event and the new calendar.

Although an event can appear in several calendars, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a calendar event:

1. Navigate to and open the calendar that contains the event you want to move.
2. Click the title of the event.

   The Properties page for the event appears.
3. Click the **Locations** tab.

   The Locations page appears, showing the event's current location(s).
4. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
5. Do one of the following:
   - To find specific calendars, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all calendars, click **Show All**.
   - To display your favorite calendars, click **Show Favorites**.
6. In the **Possible Locations** field, select the calendar(s) in which you want the event to appear and click the **Add** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).
7. In the **Selected Locations** field, select any calendars in which you do not want the event to appear and click the **Remove** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one calendar appears in the **Selected Locations** field. Otherwise, the event will become orphaned, which means it will not appear in any calendar.

8. Click **Update Locations**.

7

DocuShare discussions

About discussions

To facilitate an online exchange of ideas, DocuShare supports threaded discussions. You can add a container to a collection, called a discussion, in which users add topics for other users to read and reply to. As users reply to a topic, their responses are sequentially linked, or threaded, to the original topic. Users can read or reply to any of the topics or replies in a thread.

Adding a discussion

You can add a discussion to a collection if you are logged in and have Writer access to the collection.

To add a discussion to a collection:

1. Navigate to and open the collection to which you want to add a discussion.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **Discussion**.

   The Add Discussion page appears.

3. In the **Title** field, enter a name for the discussion. The name should be short, but descriptive, and can contain spaces and punctuation marks.

4. In the **Topics Expire In** field, select the length of time to retain topics and their message threads in the discussion after they are added.

   When a topic becomes older than the duration you select, it no longer appears in the discussion. You can view and delete expired topics on the discussion's View Expired page.

5. Enter any optional information. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The Properties page for the discussion appears, displaying information about the new discussion.

7. You can click the discussion name displayed in the **Location** breadcrumbs to open the discussion.

To change the discussion's access permissions, see Access permissions.

Viewing and changing discussion properties

You do not need to be logged into DocuShare to view a discussion's properties. However, only the logged-in owner of a discussion or a logged-in user with Writer access to the discussion can change the properties.

To view and change a discussion's properties:

1. Locate the discussion whose properties you want to view and change.
2. Do one of the following:
   - If the discussion is open, click the **Edit Properties** link in the upper-right corner of the window.
   - If the discussion is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the discussion's title.

   The Properties page for the discussion displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Changing the location of a discussion

You can move a discussion to another collection or have the discussion appear in several collections on your site. Although a discussion can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a discussion's location, you must be logged in and have Writer access to both the discussion and the new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a collection to another collection. See Editing multiple objects in a collection on page 3–7.

To change a discussion's location:

1. Navigate to and open the collection that contains the discussion whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the discussion's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the discussion's title. Click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the discussion to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the discussion to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the discussion will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Properties page for the discussion appears displaying the collection title(s) in which the discussion now appears.

Deleting a discussion

You can delete a discussion on your DocuShare site if you are the logged-in owner of the discussion or have Manager access to it. When you delete a discussion, all of its current and expired topics are also deleted.

To delete a discussion:

1. Navigate to and open the collection that contains the discussion you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the discussion's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the discussion's title. On the Properties page for the discussion, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the discussion, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the discussion from your site.

   If you do not want to delete the discussion, click **Cancel**.

Restoring a deleted discussion

If you accidentally delete a discussion, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted discussion.

Adding a topic to a discussion

A topic is the first message added to a discussion and initiates the online conversation. Users can reply to the topic as well as to individual replies. By default, replies are indented, which provides a hierarchical display of the discussion.

You can add a topic to a discussion if you are logged in and have Writer access to the discussion.

To add a topic:

1. Open the discussion to which you want to add a topic.
2. Click the **Add Topic** button.

NOTE: If your administrator created a custom topic, it appears in the **Add** menu.

3. In the **Title** field, enter a name for the topic.
4. In the **Description** field, enter the topic message. The description appears below the title in a discussion. You can include HTML tags in the topic's description.
5. Click **Submit**.

   The topic appears in the discussion.

To change the topic's access permissions, see Access permissions.

Adding replies

If you are logged in and have Writer access to the topic or reply, you can add a reply.

To add a reply:

1. Navigate to and open the discussion.
2. Locate the topic or reply to which you want to reply.
3. Click the **Reply** button.
4. Enter a title and description.
5. If you want to include the previous message and the name of the user who added it, click **Quote Post**.
6. Click **Submit**.

Viewing and changing the properties of a topic or reply

Any user can view the properties of a topic or reply. You can change the properties of a topic or reply if you are logged into DocuShare and have Writer access to the object.

To view and change the properties of a topic or reply:

1. Navigate to and open the discussion that contains the topic or reply you want to change.
2. Click the **Properties** icon that appears to the right of the object.

   The Properties page for the object displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

Deleting a topic or reply

You can delete a topic or reply if you have Manager access to it or you are the object's owner. You also must be logged into DocuShare. When you delete a topic or reply, any message threads also are deleted.

To delete a topic or reply:

1. Navigate to and open the discussion that contains the topic or reply you want to delete.
2. Do one of the following:
   - Click the **Properties** icon that appears to the right of the object's title. At the bottom of the Properties page, click the **Delete** button.
   - Select the checkbox that appears next to the object's title. From the **Edit Selected** menu, select **Delete**.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the topic or reply, then you do not have Manager access to the object and cannot delete it.

3. On the Confirm Delete page, click the **Delete** button.

   If you do not want to delete the object, click **Cancel**.

Changing the location of a topic

You can move a topic and its message thread to another discussion or have it appear in several discussions. To move a topic, you must be logged in and have Writer access to both the topic and the new discussion.

Although a topic can appear in several discussions, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a topic:

1. Navigate to and open the discussion that contains the topic you want to move.
2. Click the **Properties** icon that appears to the right of the topic's title.

   The Properties page for the topic appears.
3. Click the **Locations** tab.

   The Locations page appears, showing the topic's current location(s).
4. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
5. Do one of the following:
   - To find specific discussions, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all discussions, click **Show All**.
   - To display your favorite discussions, click **Show Favorites**.
6. In the **Possible Locations** field, select the discussion(s) in which you want the topic to appear and click the **Add** button. To select multiple discussions, use the CTRL key (Windows) or the Command key (Macintosh).
7. In the **Selected Locations** field, select any discussions in which you do not want the topic to appear and click the **Remove** button. To select multiple discussions, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one discussion appears in the **Selected Locations** field. Otherwise, the topic will become orphaned, which means it will not appear in any discussion.

8. Click **Update Locations**.

Viewing and deleting expired topics

If you set an expiration for the topics added to a discussion, you can view and delete the expired topics. To delete expired topics, you must be logged in and have Manager access to the topics.

To view and delete expired topics:

1. Navigate to and open the collection that contains the discussion whose expired topics you want to view.
2. Click the **Properties** icon that appears to the right of the discussion's title.

   The Properties page for the discussion appears.
3. Click the **View Expired** tab.

   The page displays all of the expired topics that no longer appear on the discussion.
4. Do one of the following:
   - Select the individual topics that you want to delete.
   - Click **Select All** to select all of the topics.
5. Click **Delete Selected**.

8

DocuShare URLs

About DocuShare URLs

A DocuShare URL is a link to a web page. Adding a URL to a collection enables you to easily share useful and interesting web pages with other DocuShare users and guests.

Adding a URL

You can add a URL to a DocuShare collection if you are logged in and have Writer access to the collection.

To add a URL to a collection:

1. Navigate to and open the collection to which you want to add a URL.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **URL**.

   The Add URL page appears.

3. In the **URL** field, enter the Internet address of the web page (for example, http://docushare.xerox.com).

   While viewing the web page in a browser, you can copy the URL from the **Address** or **Location** field and paste it into the **URL** field.

4. In the **Title** field, enter a name for the URL. The name should be short, but descriptive, and can contain spaces and punctuation marks.

5. Enter any optional information. Click a field name for a description of each property.

6. Click **Apply**.

   The Properties page for the URL appears, displaying information about the new URL.

7. You can click the collection name displayed in the **Location** breadcrumbs to see the URL object.

To change the URL's access permissions, see Access permissions.

Viewing and changing URL properties

You do not need to be logged into DocuShare to view a URL's properties. However, only the logged-in owner of a URL or a logged-in user with Writer access to the URL can change its properties.

To view and change a URL's properties:

1. Navigate to and open the collection that contains the URL whose properties you want to view and change.
2. Click the **Properties** icon that appears to the right of the URL's title.

   The Properties page for the URL displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want. Click a field name for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Changing the location of a URL

You can move a URL to another collection or have the URL appear in several collections on your site. Although a URL can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a URL's location, you must be logged in and have Writer access to both the URL and the new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a URL to another collection. See Editing multiple objects in a collection on page 3–7.

To change a URL's location:

1. Navigate to and open the collection that contains the URL whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the URL's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the URL's title. Click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the URL to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the URL to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the URL will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Properties page for the URL appears displaying the collection title(s) in which the URL now appears.

Deleting a URL

You can delete a URL on your DocuShare site if you are the logged-in owner of the URL or a logged-in user with Manager access to it.

To delete a URL:

1. Navigate to and open the collection that contains the URL that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the URL’s title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the URL’s title. On the Properties page for the URL, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the URL, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the URL from your site.

   If you do not want to delete the URL, click **Cancel**.

Restoring a deleted URL

If you accidentally delete a URL, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted URL.

9

DocuShare subscriptions

About subscriptions

A subscription allows you to be notified of a change to a DocuShare object. You can add a subscription for any object on your site. For example, you can add a subscription for a document to have DocuShare notify you when a new version of the document is added to a collection. You might want to add a subscription for a collection to know when new content is added to the collection.

DocuShare notifies you by email when a change occurs. You can choose to receive immediate notification or receive a summary report on a daily or weekly basis.

You can add a subscription for any of the following changes to an object:

Any change—Any change to an object.

Something added—A new object is added to a collection, calendar, or discussion.

New document version added—A new version of a document is added to a collection.

Something deleted—The object is deleted.

Properties edited—The object's properties are changed.

Permissions edited—The object's permissions are changed.

Change in ownership—The object's owner is changed.

Location edited—The object's location is changed.

Document locked or checked out—The document is locked or checked out.

Document unlocked—The document is unlocked after being locked, but a new version of it was not added.

NOTE: To use DocuShare subscriptions, your administrator must configure the server with an SMTP mail gateway for outgoing mail. Your user account properties must include an email address.

Adding a subscription

You can add a subscription for an object if you are logged in and have Reader access to the object. If the object is a collection, you can choose how to apply the subscription to the collection and the objects in it. If the object is a calendar or discussion, the subscription applies to the container and all of the objects in it.

To add a subscription:

1. Navigate to the object for which you want to add a subscription.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.
4. In the **Events of Interest** field, select one or more events. To select multiple events, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Period** field, select one of the following time periods:
   - **Immediate** provides notification immediately after the event occurs.
   - **Daily** provides notification in a daily summary report.
   - **Weekly** provides notification in a weekly summary report.
6. In the **Include Recipient Activity** field, select **Yes** to also notify the user whose action caused the subscription notification. Otherwise, select **No**.
7. In the **Sender** field, select the username that appears in the email message **From** field: **Admin** or **Owner**.
8. Enter any optional information. Click a field name for a description of each property.
9. Click **Apply**.

   The subscription does not appear as an object in a collection. Subscriptions appear on the object's Subscriptions page.

Viewing subscriptions

You must be logged into DocuShare and have Reader access to the object to view its subscriptions.

To view an object's subscriptions:

1. Navigate to the object whose subscriptions you want to view.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.

Viewing and changing subscription properties

To view an object's subscription properties, you must be logged-in and have Reader access to the object. You must be the logged-in owner of a subscription or a logged-in user with Writer access to the subscription to change the subscription's properties.

To view and change an object's subscription properties:

1. Navigate to the object whose subscription properties you want to view and change.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to change.

   The Properties page for the subscription displays the read-only properties.
5. Click the **Edit** tab.
6. Change the properties you want. Click a field name for a description of each property.
7. Click **Apply**.

Creating a recipient list for a subscription

You can create a recipient list for a subscription to have DocuShare notify others when a change occurs to an object. For example, you may want co-workers to know when a new version of a document is added to a collection or when an object is moved to another location.

You must be the logged-in owner of a subscription or a logged-in user with Writer access to the subscription to create a recipient list.

To create a recipient list for a subscription:

1. Navigate to the object that has the subscription for which you want to create a recipient list.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to change.

   The Properties page for the subscription appears.
5. Click the **Recipients** tab.
6. Click **Change Recipients**.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the recipient list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the recipient list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
11. Click **Update**.

Deleting a subscription

You can delete a subscription if you are the logged-in owner of a subscription or a logged-in user with Manager access to the subscription.

To delete a subscription:

1. Navigate to the object whose subscription you want to delete.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to delete.

   The Properties page for the subscription appears.
5. Click the **Delete** button.

   The Confirm Delete page appears.
6. Click **Delete**.

Restoring a deleted subscription

If you accidentally delete a subscription, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted subscription.

10

DocuShare searches

About DocuShare searches

DocuShare search features enable you to quickly find objects on your site. You can perform simple word searches by having DocuShare find the objects that contain the text you specify. You also can combine several search terms to find specific objects, such as all documents authored by one user that contain the word DocuShare in their titles. When searching for objects, you can search all of the collections on the site or a single collection.

When an object is added to a collection, DocuShare indexes and stores in a database the object's properties (also called metadata) and, if the object is a document, its content. A search checks the database to find the objects that match your search terms. In addition, DocuShare uses a process called stemming to find objects that contain variations of the word you specify. For example, a search for the word **bath** will find the words **baths** and **bathes**.

Searching for objects

From the home page or any collection page you can search for objects and content. You do not need to be logged into DocuShare to run a search.

To run a quick search:

1. On the home page or a collection page, enter one or more words in the **Search** field.

   If you want DocuShare to search for an exact phrase or a phrase that includes a search operator, enclose the phrase in quotation marks (for example, “war and peace”).

2. If you are running the search from a collection page, do one of the following:
   - Click **This Collection** to search the current collection only.
   - Click **Entire Site** to search all collections.

3. Click **Go**.

   DocuShare displays the search results. For documents, DocuShare either provides a snippet of the document content with the search term highlighted or displays the document’s abstract if the search term is not found in the content. You can click the **Show/Hide Details** button to control this display.

Search options

When running a quick search, you can specify several options to narrow the search and to control how the search results are displayed.

To run a quick search using search options:

1. Enter the search words in the **Search** field and, if the **In** field appears, select the search scope.

2. Click the small triangle next to the **Go** button and specify any of the following information:

   Search Text Contained In—Specifies the location of the search words. **Any Text** searches the object’s content and properties.

   Last Modified—Limits the search to objects that were last changed within a specific time period.

   Object Types—Specifies the type of objects to search.

   Document Types—Searches for all types of documents or a specific type. The **Object Types** must be set to **All Object Types** or **Documents Only**.

   Maximum Results—The maximum number of objects to display in the search results list. DocuShare orders the results by displaying the most relevant objects first.

   Sort Results—The order in which to display the search results.

3. Click **Search**.

   DocuShare displays the search results.

Running an advanced search

Using the Advanced Search page, you can further narrow a search by combining search terms, specify ranges, and search for specific objects and documents.

To run an advanced search:

1. On the home page or a collection page, click the **Advanced** link.
2. If you are running the search from a collection, select the search scope in the **Search Within** field.
3. In the **Maximum Results** field, select the maximum number of objects to display in the search results list. DocuShare orders the results by displaying the most relevant objects first.
4. In the **Sort Results** field, select the order in which to display the search results.
5. Under **Search Text Contained In**, enter the search term. Create a search term by selecting where the search words should occur, selecting an operator, and then entering the search word or words. If you want DocuShare to search for an exact phrase or a phrase that includes a search operator, enclose the phrase in quotation marks (for example, “war and peace”).

   You can click **+ add search term** to create another search term using a logical operator. See Table 10–1 for a description of each logical operator.

NOTE: For information on how to use wildcard and nonalphanumeric characters in a search term, see Using reserved characters in a search on page 10–7.

6. Under **Limit Search to Date Range**, enter the date range to use when searching for objects. Create a date range by selecting options from the menus and entering a date.

   You can click **+ add date range** to create a second date range.
7. Under **Find Results with Numeric Range**, enter the numeric range to use when searching for objects whose properties have numeric values.

   You can click **+ add numeric range** to create a second numeric range.

NOTE: This field appears if an object has a numeric property that is searchable.

8. Under **Object Types to Search**, do one of the following
   - To search all of the objects on the site, click **Search all object types**.
   - To search specific objects only, click **Limit search to selected object types** and select the objects to search from the list.

9. If you searching all object types or documents only, under **Document Types to Search**, do one of the following
   - To search all types of documents, click **Search all document types**.
   - To search specific types of documents, click **Limit search to selected document types** and select the types of documents to search from the list. Each document type is specified by its MIME type.
10. Click the **Search** button.

    DocuShare displays the search results. For documents, DocuShare either provides a snippet of the document content with the search term highlighted or displays the document's abstract if the search term is not found in the content. You can click the **Show/Hide Details** button to control this display

Table 10–1: Logical operators

Logical operator	Meaning
And	**Searches for objects that contain all of the search terms.** For example: Search for objects where "Title contains Training **And** Summary contains Basic Product." The search would return only objects that have the word "Training" in the Title, and the phrase "Basic Product" in the Summary.
Or	**Searches for objects that contain one of the search terms.** For example: Search for objects where "Title contains Advanced **Or** Summary contains Administrator." The search would return objects that have either the word "Advanced" in the Title or the word "Administrator" in the Summary, or both the word "Advanced" in the Title and "Administrator" in the Summary.
Accrue	**Searches for objects that contain at least one of the search terms, and relevance ranks the results by displaying the objects that contain the largest number of search terms first.** For example: Search objects where "Title contains Advanced **Accrue** Summary contains Administrator." The search would first return objects that have both Advanced in the Title and Administrator in the Summary, then objects that contain just one of the search terms (either Advanced in the Title or Administrator in the Summary).

Table 10–1: Logical operators

Logical operator	Meaning
And Not	**Searches for objects that contain one search term and not the other.** For example: Search objects where “Title contains Technology **And Not** Title contains Marketing.” The search would return only those objects where Technology was in the Title, but not return objects if Marketing was also in the Title.

Using reserved characters in a search

You can use these wildcard characters when building a search:

Question mark ?—Specifies any single alphanumerical character.
For example: **?an** returns ban, can, dan, fan, etc.

Asterisk *—Specifies any number of alphanumerical characters.
For example: **corp*** returns corporate, corporation, corporal, corpulent, etc.

NOTE: To find objects that include a wildcard character, select the specific property name, use the equals operator, and precede the character with two backslashes (\\). For example, to search for a document named *ReadFirst enter: **Title equals *ReadFirst**.

To find objects that include nonalphanumeric characters, such as at signs (@) and equal signs (=), or nonalphanumeric and wildcard characters, select the specific property name, use the equals operator, and enclose the search text within single quotation marks.

Example: To search for jbrown@mycompany.com, enter:

(User) Email Address equals ‘jbrown@mycompany.com’

Example: To search for jbrown@* enter:

(User) Email Address equals ‘jbrown@*’

NOTE: Three nonalphanumeric characters, the ampersand (&), dash (-), and underscore (_), are considered alphanumeric characters and do not require any special treatment. For example, to search for my_document.doc, enter **my_document.doc**.

Saving a search query

A saved search query consists of a defined set of search terms. You can save a search in a collection to reuse it or to share it with other users. You can save a search query after running a search, or you can define a search query and save it.

To save a search query, you must be logged in.

To save the query used in a search:

1. Define your search terms and run a search.

   The search results display.

2. From the **Add** menu, select **Saved Query**.

   The Add Saved Query page appears.

3. In the **Title** field, enter a title for the saved query.
4. Enter any optional information. Click a field name for a description of each property.
5. Click **Save Search**.

   The Properties page for the query appears. You need to add the saved query to a collection.

6. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
7. In the **Possible Locations** field, select the collection(s) in which you want the saved query to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
8. In the **Selected Locations** field, select any collections in which you do not want the saved query to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
9. Click **Update Locations**.

   DocuShare adds your search query to the collection. When you click the saved query, DocuShare runs the search using the saved search terms and displays the results.

Changing saved query properties

You can change the properties and search terms of a saved query if you are the logged-in owner of the query, or you are logged in and have Writer access to it.

To change a saved query's properties:

1. Open the collection that contains the saved query whose properties you want to change.
2. Click the **Properties** icon that appears to the right of the saved query's title.

   The Properties page for the saved query displays the read-only properties.
3. Click the **Edit** tab.
4. Change the properties you want.
5. Click **Apply**.
6. Click the **Edit Query** tab.
7. Change the search terms you want.
8. Click **Apply**.

   DocuShare saves the changes to the saved query.

Changing the location of a saved query

You can move a saved query to another collection or have the saved query appear in several collections on your site. Although a saved query can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a saved query's location, you must be logged in and have Writer access to both the saved query and the new collection.

NOTE: You can also use the **Copy** and **Paste** commands to copy a saved query to another collection. See Editing multiple objects in a collection on page 3–7.

To change a saved query's location:

1. Navigate to and open the collection that contains the saved query whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the saved query's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the saved query's title. Click the **Locations** tab.
3. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
4. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
   - To display your favorite collections, click **Show Favorites**.
5. In the **Possible Locations** field, select the collection(s) in which you want the saved query to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any collections in which you do not want the saved query to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the saved query will become orphaned, which means it will not appear in any collection.

7. Click **Update Locations**.

   The Properties page for the saved query appears displaying the collection title(s) in which the saved query now appears.

Deleting a saved query

You can delete a saved query if you are the logged-in owner of the query or a logged-in user with Manager access to it.

To delete a saved query:

1. Open the collection that contains the saved query that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the saved query's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the saved query's title. On the Properties page for the saved query, click the **Delete** button.

   The Confirm Delete page appears.
3. Click **Delete** to remove the saved query from your site.

   If you do not want to delete the saved query, click **Cancel**.

Restoring a deleted saved query

If you accidentally delete a saved query, your administrator can restore it if the trashcan is enabled on your site. The trashcan holds deleted objects until your administrator expunges or restores the trashcan contents. See your administrator to restore a deleted saved query.

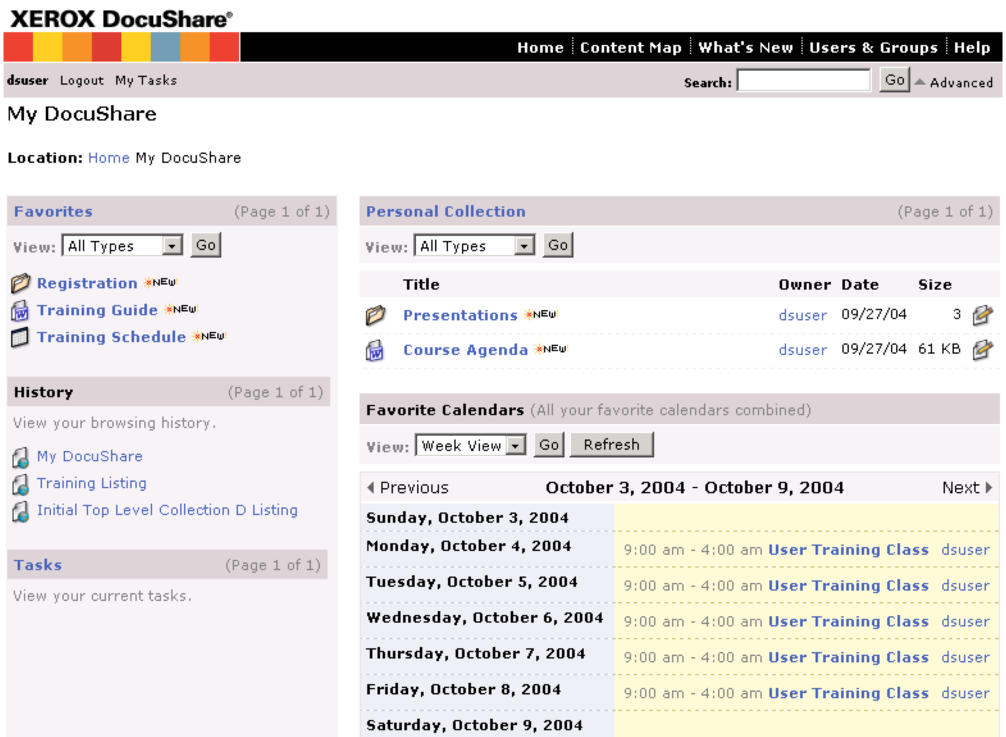
11

My DocuShare

About My DocuShare

My DocuShare lets you easily manage personal content from a single page. Your favorite objects, personal collection, favorite calendars, browsing history, and routing tasks are all accessible from My DocuShare.

After logging into DocuShare, a link to My DocuShare appears on the site home page and on the navigation bar. The figure below shows a My DocuShare page.



Managing favorites

To conveniently access frequently used objects from a single location, you can add them to your favorites. Any object you add as a favorite is a link to the original object, not a copy. If the original object is deleted, it will no longer appear in your favorites.

To add an object to your favorites:

1. Navigate to the object that you want to add to favorites.
2. Do one of the following:
   - Click the checkbox that appears next to the object's title. From the **Edit Selected** menu, select **Add to Favorites**. On the Confirm Add to Favorites page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the object's title. At the bottom of the Properties page for the object, click **Add to Favorites**.
3. On the navigation bar, click **My DocuShare**.

   The object you added appears under **Favorites**. The **View** menu lets you display one type of favorite object, such as favorite documents. You can click the **Favorites** heading to display your favorites in a collection listing. In this view you can use standard collection features.

To remove an object from your favorites:

1. Open **My DocuShare**.
2. Click the **Favorites** heading.
3. From the **Edit Selected** menu, select **Remove Favorite**.
4. On the Confirm Remove from Favorites page, click **Confirm**.

   The object no longer appears in favorites. However, the object still appears in its original location(s).

Using your personal collection

Your personal collection on My DocuShare is a private repository for your objects. By default, only you and a group of administrators called Content Administrators have full access to the collection.

To add an object to your personal collection:

1. Open **My DocuShare**.
2. Click the **Personal Collection** heading.
3. From the **Add** menu, select the type of object you want to add.
4. On the Add page, enter the required information and click **Apply**.
5. On the navigation bar, click **My DocuShare**.

   The object you added appears under **Personal Collection**. The **View** menu lets you display one type of object, such as documents.

To view your personal collection in full page:

1. Open **My DocuShare**.
2. Click the **Personal Collection** heading.

   The objects display in a collection listing. In this view you can use standard collection features such as adding new objects and changing the collection's properties.

NOTE: When you click the **Delete** button on the Properties page for the collection, you can delete the collection and, optionally, its contents. However, the next time you access **My DocuShare** your personal collection appears.

Using your personal calendar

Your personal calendar is a combination of all your favorite calendars. This allows you to merge the events from separate calendars into a master calendar. For example, you can add individual vacation calendars to your favorites to create a single vacation calendar for a group.

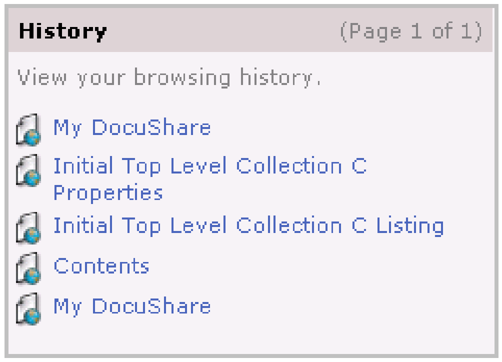
To create a personal calendar:

1. Navigate to the calendar that you want to add to favorites.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Add to Favorites**. On the Confirm Add to Favorites page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the calendar's title. At the bottom of the Properties page for the object, click **Add to Favorites**.
3. Repeat steps 1 and 2 to add additional calendars to favorites.
4. On the navigation bar, click **My DocuShare**.

   The single, personal calendar appears under **Favorite Calendars**.
5. Using the **View** menu, you can switch between daily and weekly views of the calendar.

Viewing your browsing history

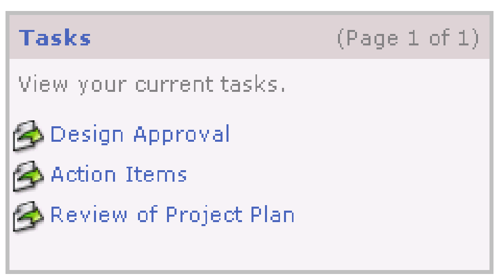
Under the **History** heading, you can view the twenty most recent DocuShare pages you have visited while logged into DocuShare. Each page is linked, allowing you to click it to go to that page. Your browsing history restarts each time you log into DocuShare.



Viewing your routing tasks

All of the routing tasks assigned to you are listed under the **Tasks** heading. This provides you with a quick view of the tasks to which you need to respond. You can click a task to open its window.

In addition, clicking the **Tasks** heading displays the My Tasks window. You can view both the tasks assigned to you and the tasks you assigned, and your routing task history in this window. For more information on document routing, see Routing documents.



12

Routing documents

About routing documents

During a document's development cycle, you often need to solicit feedback from others, receive approval of the document's content, or simply share the information in the document. DocuShare enables you to automate the routing of documents to users and request a specific action after the users receive the documents.

On a form called a Routing Slip, you indicate the users to whom the document should be sent, the type of action you want the users to take, and a message describing the document task. You then submit the Routing Slip; DocuShare notifies the specified users of the document task. While a task is in progress, you can monitor its status.

Routing a document

You can route a document that is stored in a collection on your site or you can choose to route a document when adding it to a collection. In addition, you can route an individual document version. On the Routing Slip that accompanies the document, you can request users to approve the document, review the document and provide changes, or acknowledge receipt of the document, or you can provide the document for information only.

When creating a routing task, you can define a single routing step or several sequential steps. A single routing step consists of one type of action, such as sending a document to users for approval. A multi-step routing task enables you to automate a document process. For example, you can create a routing task to send a document to a group of users for their review and comment before sending the revised document for approval.

Routing a document

You can route a document that is stored in a collection or you can choose to route a document immediately after adding it to a collection.

To route a document:

1. Do one of the following:
   - Locate the document or document version that you want to route. Click the **Route** icon that appears to the right of the document's title. A **Route** icon does not appear if the document is locked
   - In a collection, select **Document** from the **Add** menu. Enter the required information and click **Publish and then route the document** before clicking **Apply**.

   The Route Document window appears.
2. If you want to use a saved Routing Slip, do one of the following and then go to step 17:
   - Select one of your saved Routing Slips and click **Load**.
   - Click **All Saved Routing Slips** to display the public Routing Slips saved by all site users. Select a Routing Slip.
3. Under **Routing Action**, choose one of the following:
   - **Approve or Disapprove**—Requires users to approve or not approve the document.
   - **Review and Make Changes**—Allows users to provide comments and a revised version of the document. Click **Share Changes with Recipients** if you want each recipient to see the previous recipient's changes.
   - **Acknowledge Receipt**—Provides the document to users for information and requires the users to confirm receiving the document.
   - **Information**—Provides the document to users for information only.

4. Depending on the routing action you selected, choose one of the following **Routing Orders**:
   - **In Order**—Routes the document to users in the order in which they are listed in the **Selected Users/Groups** field. If a user does not approve the document, it is not routed to subsequent users.
   - **At the Same Time-Single Reply**—Routes the document to all users simultaneously and only one user's reply is needed to complete the routing task.
   - **At the Same Time-All Reply**—Routes the document to all users simultaneously and all users must reply to complete the routing task.
   - **At the Same Time-Majority Reply**—Routes the document to all users simultaneously and more than half of the users must reply to complete the routing task.
5. Under **Message**, do the following:
   - In the **Subject** field, enter a brief topic that appears in the notification or email that the user receives.
   - In the **Comments** field, enter a message.
6. Click **Next** to go to the Add Recipients page.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
9. In the **Possible Users/Groups** field, select the accounts to add to the list of recipients and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the list of recipients and click the **Remove** button.
11. To show the members in a group, select the group in the **Selected Users/Groups** field and click **Show Group Members**. The group members replace the group title and the routing task is sent to each user and not to the group.
12. To reorder the recipients in the **Selected Users/Groups** field, select an account and do one of the following:
    - To move the recipient before another recipient, click **Move Up**.
    - To move the recipient after another recipient, click **Move Down**.
13. Click **Next** to go to the Choose Escalation and Notification page.
14. Under **Escalation**, choose any of the following:
    - **If Not Completed By**—Specifies a completion date for the routing task. Either enter a date in the field or click the **Calendar** icon and select a date.
    - **Then Escalate**—If the routing task is not complete by the specified date, choose the type of action you want to take.

15. Under **Notify Me**, choose any of the following:
    - **Of Escalation**—Notifies you of the escalation action.
    - **Of Task Progress**—Notifies you of the routing status after each user action.
    - **When Task Is Complete**—Notifies you when each routing step is complete.

    To check for notifications, click the **My Tasks** link on the navigation bar and select **Tasks Assigned to Me**.
16. Click **Done** to go to the Routing Summary page.
17. Review the routing information for the task and then do one of the following:
    - Click **Submit** to start the routing task.
    - Click **Back** to change any of the routing information.
    - Click **Add Step** to add another step to the routing task.

NOTE: Before submitting the routing task, you can save the Routing Slip. Click **Save Routing Slip**. Enter a name for the Routing Slip and keep **Save as private** selected if you do not want to share the Routing Slip with other users. Then click **OK**.

Routing a document before adding it to a collection

When routing a document from the Add Document page, you can choose to route the document before adding it to the collection. When the routing task is complete, you must publish the document to add it to the collection. For information on how to publish the document, see Checking the status of routing tasks you assigned on page 12–7.

To route a new document:

1. Navigate to and open the collection to which you want to add a document.
2. From the **Add** menu, select **Document**.

   The Add Document page appears.
3. Enter the required and any optional information.
4. For **Document Routing**, select **Route the document and publish it later**.
5. Click the **Apply** button.

   The Route Document window appears.
6. Follow steps 2 through 17 in Routing a document on page 12–3.

NOTE: If the type of routing task requires a recipient to be added to the access list, DocuShare will display two messages on the Routing Summary page: one message refers to the document and the other refers to the document version.

Adding documents to the Routing Slip

Before submitting a Routing Slip, you can include additional documents to be routed. You can add a document from a collection and from the Add Document page.

To add a document to a Routing Slip:

1. Do one of the following:
    - Navigate to the collection that contains another document that you want to route and click the document's **Route** icon.
    - In an Add Document window, enter the document filename and title, and then select either **Route the document and publish it later** or **Publish and then route the document**.
2. In the confirmation window, click **OK**.

    The document you added appears on the Routing Slip's Routing Summary page. On the Routing Summary page, you can remove a document from the Routing Slip by selecting the document and clicking the **Remove** button.

Checking the status of routing tasks you assigned

You can check the status of completed and pending routing tasks that you assigned to other users. Once a task is complete, you can choose to delete it, keep a record of it, or publish the document to add it to the collection.

To check the status of a routing task:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. The click **Tasks**.

   The My Tasks window appears.
2. From the **Show** menu, select **Tasks Assigned by Me**.

   The page lists the routing tasks, under Description, the date the task began, and the status. Table 12–1 describes the status information.

Table 12–1: Task status

Status	Description
Approved	The single-step task or one step of a multi-step task is complete and the recipient(s) approved the document(s).
Disapproved	The single-step task or one step of a multi-step task is complete and the recipient(s) did not approve the document(s).
Reviewed	The single-step task or one step of a multi-step task is complete and the recipient(s) reviewed the document(s).
Acknowledged	The single-step task or one step of a multi-step task is complete and the recipient(s) acknowledged receiving the document(s).
Delivered	The single-step task or one step of a multi-step task is complete and the recipient(s) received the document(s) for their information.
All Steps Completed	The multi-step task is complete.
Started	The task is pending. It is currently being routed to all recipients at the same time for approval, review, or acknowledgement.
Username	The task is pending. It is currently being routed to all recipients in order; the user whose name is displayed has received the document, but has not taken any action.
Step #	The task is pending and is on a specific step of a multi-step task.

Table 12–1: Task status

Status	Description
Step #: Username	The task is pending and is on a specific step of a multi-step task. It is currently being routed to all recipients in order; the user whose name is displayed has received the document, but has not taken any action.
Overdue	For a single-step task or one step of a multi-step task that is overdue, the word Overdue appears after the task's description.
Terminated	The task is stopped because it cannot continue. This can occur when **Cancel Task** is set for **Then Escalate** or when a document or user is deleted from your site.

3. To view more information about the task, click the task's description.

   A Report on Routing window appears, which shows the status of each user assigned the task.

4. Do one of the following:

   - To view an individual recipient's comments, click the user's name.
   - To view all recipient comments, click **Show all User Comments**. If you want, you can save the comments to a text file.

   Close the window after viewing the comments.

5. To view the user's changes to the document, click the document's title.
6. Close the document after viewing the changes. Then close the Response to Routing window.
7. If the task is complete, do one of the following:

   - To move a task from the **Tasks Assigned by Me** list to your **Deleted Tasks**, click **Delete This Job**.
   - To complete the task later, click **Keep for Later**. The task remains in the **Tasks Assigned by Me** list.
   - To publish a document that has not been added to a collection (the word Unpublished appears after the document's title), click the **Properties** icon that appears to the right of the document's title. At the bottom of the Properties page, click the **Publish This Version** button.

Viewing progress reports

If you chose to be notified of a task's progress, completion, or overdue status on the Routing Slip, you can view the notifications in the Routing Tasks window.

To view a task's progress report:

1. Do one of the following:

   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. The click **Tasks**.

The My Tasks window appears.

2. From the **Show** menu, select **Tasks Assigned to Me**.

   The page lists the routing tasks, under Description, the date the task was assigned, and the type of report. Table 12–2 describes the report types.

Table 12–2: Report type

Type	Description
Response	The recipient responded to the task.
Completion	The task is complete.
Overdue	The task is in progress past the completion date.
Termination	The task is stopped because it cannot continue. This can occur when a document or user is deleted from your site.

3. To view a task's progress report, click its Description.

   A Response to Routing window appears, which includes the routed document and shows the user's comments.

4. To view the user's changes to the document, click the document's title.

   You can save the user's revised document as a new version of your routed document. See the next section, Publishing a new version of your routed document on page 12–9.

5. Close the document after viewing the changes.

6. In the Response to Routing window, do one of the following:

   - To schedule a new due date for an overdue task, enter a new date in the **Due Date** field and click the **Acknowledged** button.
   - To confirm reviewing the report, click the **Acknowledged** button.
   - To review the report at a later time, click the **Acknowledge Later** button.

Publishing a new version of your routed document

If you routed a document for review, you can save a document that a recipient changed as a new version of your routed document. In the For Your Review window, the word New appears after the title of a document that a recipient changed.

To publish a new version of your routed document:

1. In the My Tasks window, select **Tasks Assigned by Me**.
2. Under **Description**, click the task that includes the changed document.
3. In the Report on Routing for Review window, click the name of the recipient who provided the changed document.
4. Click the document title to open it.
5. Save the document to a location on your computer, and then close the document window.
6. In the Report on Routing for Review window, click the **Close** button.

7. Click the **Properties** icon that appears to the right of the document's title.
8. At the bottom of the Properties page, click the **Publish New Version** button.
9. On the Add Version page, click the **Browse** button.
10. Navigate to the location on your local drive in which you saved the document in step 5, select it, and click **Open**.

    The path to the document appears in the **Filename** field.
11. Optionally, change the document title and add a version comment.
12. Click **Apply**.
13. If a document version other than the latest is the preferred version, you are asked if you would like to set this version as the preferred version. Click **Yes** to change the preferred version; otherwise, click **No**.

    For more information on document versions and the preferred version, see Managing document versions on page 4–12.
14. Click the **Report on Routing for Review** link in the **Location** path.
15. In the Report on Routing for Review window, do one of the following:
    - To move the task from the **Tasks Assigned by Me** list to your **Deleted Tasks**, click **Delete This Job**
    - To remove the task later, click **Keep for Later**. The task remains in the **Tasks Assigned by Me** list.

Viewing the tasks assigned to you

The tasks assigned to you display in the My Tasks window or on My DocuShare. If you chose to receive an email message when a new task is assigned to you, the message includes a URL to the task.

NOTE: To receive an email message when a new task is assigned to you, your user account property **Routing Task Notification** must be set to **Email** and your email address must appear in the **Email Address** field.

To view the tasks assigned to you:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**. From the **Show** menu, select **Tasks Assigned to Me**. Any task marked **Request** is a task assigned to you.
   - On the navigation bar, click **My DocuShare**. The tasks assigned to you display under **Tasks**.
2. Click a task to view it.

   A window appears displaying your task. The following sections describe how to respond to routing tasks.

Approving or disapproving a document

1. In the For Your Approval window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

NOTE: If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. Review the document.
3. When your review is complete, close the document.
4. You can repeat steps 1 through 3 for each routed document.
5. In the **Comments** field, enter an optional message.
6. Click **Save as private** if you do not want other recipients to view your comments.

7. Do one of the following:
   - To complete the task and approve the document, click the **Approved** button. The task is removed from the Tasks Assigned to Me list.
   - To complete the task but not approve the document, click the **Disapproved** button. The task is removed from the Tasks Assigned to Me list.
   - To not complete the task at this time, click the **Respond Later** button. The task remains in the Tasks Assigned to Me list.

Reviewing a document

1. In the For Your Review window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

NOTE: If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. Review the document and make any changes you want.
3. Close the document and, if you made changes, save it to a location on your computer.
4. If you changed the document, do the following:
   a. Click the **Properties** icon that appears to the right of the document's title.
   b. At the bottom of the Properties page, click the **Add Draft Version** button.
   c. On the Add Version page, click the **Browse** button.
   d. Navigate to and select the document you changed, and then click **Open**.
   e. Optionally, change the document title and add a version comment.
   f. On the Add Version page, click **Apply**.
   g. If a document version other than the latest is the preferred version, you are asked if you would like to set this version as the preferred version. Click **Yes** to change the preferred version; otherwise, click **No**.
   h. On the Properties page, click the **For Your Review** link in the **Location** path.
5. You can repeat steps 1 through 4 for each routed document.
6. In the **Comments** field, enter an optional message.
7. Click **Save as private** if you do not want other recipients to view your comments.
8. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Reviewed** button.
   - To not complete the task at this time, click the **Review Later** button. The task remains in the Tasks Assigned to Me list.

Acknowledging receipt of a document

1. In the For Your Acknowledgement window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

NOTE: If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. When you are finished viewing the document, close it.
3. You can repeat steps 1 and 2 for each routed document.
4. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Acknowledged** button.
   - To not complete the task at this time, click the **Acknowledge Later** button. The task remains in the Tasks Assigned to Me list.

Removing a document sent for information

1. In the For Your Information window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

NOTE: If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. When you are finished viewing the document, close it.
3. You can repeat steps 1 and 2 for each routed document.
4. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Remove** button.
   - To not complete the task at this time, click the **Remove Later** button. The task remains in the Tasks Assigned to Me list.

Viewing your deleted tasks

After you delete a completed task that you assigned by clicking the **Delete This Job** button, DocuShare saves the task in your Deleted Tasks. This provides you with a record of the completed routing tasks you assigned.

To view your deleted tasks:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. The click **Tasks**.

   The My Tasks window appears.
2. From the **Show** menu, select **Deleted Tasks**.

   Your deleted routing tasks display.

Viewing the current routing tasks of a document

The routing task owner and each recipient can view the routing status of a document or any of its versions on the Properties page for the document.

To view a document's routing tasks:

1. Do one of the following:
   - Open the collection that contains the document whose tasks you want to view.
   - Open a routing report or request window that contains the document whose tasks you want to view.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. Click the **Routing** tab.

   The tasks and their status display.

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Scanning documents

About scanning documents

If you have access to a Xerox WorkCentre with the Scan to File feature enabled, you can scan documents to DocuShare. The WorkCentre converts your printed documents to TIFF format and stores the digital documents in a temporary collection on your DocuShare server. You can save your scanned documents to a permanent collection on your site.

Scanning a document at a WorkCentre

Your WorkCentre administrator must set up a scan template before you can scan documents to DocuShare. When setting up a scan template, the administrator can choose to save each document page to a TIFF file or to save all of the document pages to a single TIFF file. Check with your administrator to find out which template you should use and whether or not a password is required.

NOTE: Depending on which WorkCentre model you use, the steps for scanning a document can vary. DocuShare does not support scanning color images on a WorkCentre Pro 40 using JPEG compression (JPEG-in-TIFF).

To scan a document:

1. Place a document on the document glass or in the document feeder.
2. Press the **Features** button.
3. On the touch screen, press the **Scan** tab.
4. Press **Scan to File**.
5. Select the scan template.
6. If the template requires a password, do the following:
    a. Press **Added Features**.
    b. Press **Filing Setups**.
    c. Press **Login Name/Password**.
    d. Press **Password**.
    e. Type your password and press **Save**.
    f. Press **Save**.
7. Press the **Start** button.

The WorkCentre scans the document and then sends it to the temporary scan collection on your DocuShare server. The document is stored in this collection for a designated time period. You can check the time period by clicking **WorkCentre Scans** on the DocuShare home page. To keep the document, you need to save it to a permanent collection.

Saving a scanned document to a collection

To save a scanned document to a collection, you must be logged in and have Writer access to the collection.

To save a scanned document to a collection:

1. Go to the DocuShare home page.
2. Under **Related Links**, click **WorkCentre Scans**.
3. If the **Passcode** field appears, enter the password you entered at the WorkCentre to scan the document and then click **Enter Passcode**.
4. Locate your scanned document.
5. Click **Save**.

   If you do not want to save the document to a collection, click **Delete** to remove the document from the temporary scan repository.
6. If you want to rotate the document, select the number of degrees from the **Rotate Image** menu and click **Go**.
7. From the **Document Type** menu, select the type of document to save the scanned document as.

   The menu contains types in addition to **Document** if your administrator created custom documents on your site.
8. If your administrator specified a default collection in which to save scanned documents, its title appears in the **Destination** field. Do one of the following:
   - If you want to use the default collection, go to step 13.
   - If you want to change the collection, click **Select**. The Select Destination page appears.
9. In the **Sort By** field, select **Name** to display the collections in alphabetical order or select **Handle** to display the collections in numerical order.
10. Do one of the following:
    - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
    - To display all collections, click **Show All**.
    - To display your favorite collections, click **Show Favorites**.
    - To display your personal collection, click **Show Personal Collection**.
11. In the **Possible Locations** field, select the collection to which you want to save the document.
12. Click **Apply**.
13. In the **Title** field, enter a title for the document.
14. Enter any additional information. Click a field name for a description of each property.

15. Click **Save**.

    The document is saved to the collection you specified.

NOTE: Your administrator may have given you access to a collection named **Temporary Scan Repository**. Alternatively, you can open this collection to move or delete your scanned document.

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Archiving content

About archiving content

The DocuShare Archive Server enables your organization to conveniently increase document storage capacity while providing a safe location for archived content. If your site includes an Archive Server, you can move content from your collections to a secondary server. When you need to retrieve your archived content, you can search for the object and, if needed, restore it to a collection.

Check with your DocuShare administrator to find out if your site uses an Archive Server.

Archiving content

You can archive documents, Interact pages, and mail messages with attachments. When you archive a document, all of its versions also are archived. To quickly archive the contents of a collection, you can select the collection and archive it. However, only the documents, Interact pages, and mail messages in the collection and its subcollections are archived; the collection is not archived and remains on the DocuShare server.

There are two ways to archive content: Specify a date on which to have objects archived automatically, or select the objects you want to archive and use the **Archive** command. After an object is archived, it retains its properties, access list, and previous location on the DocuShare server.

You can archive an object if you are the logged-in owner of the object or a logged-in user with Manager access to it.

Archiving content automatically

By default, DocuShare uses the object's **Expiration Date** property to archive content automatically. Your DocuShare administrator can specify a different date property to use for archiving, so check with your administrator to find out which property you should use.

To archive content automatically:

1. Locate the object (document, Interact page, mail message) that you want to archive.
2. Click the **Properties** icon that appears to the right of the object’s title.
3. Click the **Edit** tab.
4. In the appropriate date field, enter the date on which you want the object archived.
5. Click **Apply**.

   DocuShare archives the object on the date you specified.

Archiving content manually

To archive content manually:

1. Do one of the following:
   - Navigate to and open the collection that contains the objects you want to archive.
   - Run a search to find the objects you want to archive.
   - Navigate to the collection that contains the objects you want to archive.
2. Do one of the following:
   - To archive objects in an open collection or from a search, click the checkbox that appears next to the title of each object.
   - To archive the contents of a collection, click the checkbox that appears next to the title of the collection.
3. From the **Edit Selected** menu, select **Archive**.

   The Confirm Move to Archive page appears.

NOTE: If a minus sign appears in the checkbox that precedes an object, then you do not have Manager access to the object and cannot archive it.

4. Click the **Confirm** button to move the objects to the Archive Server.

   If you do not want to archive the objects, click **Cancel**.

Restoring archived content

You can restore any object that you moved to the Archive Server to its previous location on DocuShare. If the DocuShare collection in which the object was located was deleted, you can add the object to another collection after restoring it. An object is restored with its associated properties and access list. However, if a user who previously appeared in the object's access list was deleted from the DocuShare site, the user will not appear in the restored object's access list. Also, if you are restoring an object that was owned by another user whose DocuShare account was deleted, you will become the new owner.

You can restore an object if you are the logged-in owner of the object or a logged-in user with Manager access to it.

To restore an archived object:

1. On the home page or a collection page, click the **Advanced** link.

   The Advanced Search page displays.

2. If you are running the search from a collection, select the search scope in the **Search Within** field.

NOTE: The search scope you select is used on the Archive Server. When an object is archived, it retains its original location path. If you know any part of the object's location path, you can narrow the search scope to speed the search.

3. In the **Server to Search** field, select **Archive Server**.
4. Specify the search terms and options you want.
5. Click **Search**.

   The Search Results page displays. The words **Appeared In** followed by the collection name display under each object whose collection exists on DocuShare. If **Appeared In** and the collection name do not display, then the object's collection was deleted. You can restore the object as an orphan and then add it to another collection.

6. Select the objects to restore.
7. From the **Edit Selected** menu, select **Restore**.
8. On the Confirm Restore From Archive page, click **Confirm**.

   The Archive Restore Results page displays.

9. If the object is an orphan, do the following:

   a. Click the checkbox that precedes it.
   b. From the **Edit Selected** menu, select **Change Location**.
   c. On the Confirm Change Location page, click **Confirm**.
   d. Use the Change Location page to relocate the orphaned object.

   The Archive Restore Results page displays and lists the new collection in which the object appears under the object's title.

15

FAQs

Answers to frequently asked questions

This section provides answers to some frequently asked questions about DocuShare.

Table 15–1: FAQs

Problem	Solution
Why am I unable to create an account on DocuShare?	Your administrator may have restricted account creation to either registered users or an administrator. Check with your DocuShare administrator.
Why am I unable to log into DocuShare?	Make sure you are using a browser that supports logging into a system. Check with your DocuShare administrator to find out which browsers support logging. Also, make sure your browser is set to accept cookies. This problem can also occur when your browser is not set to refresh the page with every visit to it. In this case, you are actually logged in, but are seeing an out-of-date page.
I forgot my DocuShare username. What should I do?	On the navigation bar, click the **Users & Groups** link. On the List page click **Show All** to display all the users on your site. Locate and then click your name. The **Username** field on the Properties page displays your username.
I forgot my DocuShare password. What should I do?	Do not create another user account. Contact your DocuShare administrator, who can set another password for you.
Why does a newly added object not display when I search for it?	After adding an object to your site, wait a few seconds before searching for it as DocuShare needs to finish indexing the object and its properties.
Why does DocuShare find objects that contain a property value I did not specify?	When a property is assigned several comma-separated values, DocuShare treats the comma like a space. Therefore, DocuShare will find objects that contain adjacent property values. For example, if a document's Author property value is Susan George, Taylor Jones, DocuShare will find the document if you search for Author or Any Part contains Susan George, Taylor Jones, or George Taylor.

Table 15–1: FAQs

Problem	Solution
Why does Netscape Navigator hang when I try to upload a document to DocuShare?	Check to see if the document is open in its associated application (for example, Word or PowerPoint). If it is, close the document and try the upload again. (This is a suspected bug in the Netscape-Windows interaction.)
Why am I unable to see a document I uploaded to DocuShare? I did not have any problems during the upload.	Check your browser's proxy settings. You should not be using a proxy server to access your DocuShare server.
I uploaded a document to DocuShare and received an error saying it had an invalid index or was unable to open the collection. What should I do?	If you return to the collection to which the document was added, you should find that it was correctly uploaded. If so, the problem was with the search indexing step that occurs after your document has been uploaded. The document is stored but not indexed. Report the problem to your administrator.
When I click the title of a document in DocuShare, I get the message “Unknown File Type - You have started to download a file of type application/....” What should I do?	Make sure your browser is configured to use a helper application to view this type of document.
I am using Internet Explorer. When I click a PDF document in DocuShare, I just get a blank page. Why does the file not open?	This is a known interaction problem between Internet Explorer and Acrobat (PDF) files. Contact your administrator for help.
Why does the page does not display properly after I add HTML tags to the object's properties?	DocuShare allows you to add HTML tags to text-based properties such as an object's Description or Summary. You should limit use of HTML to simple formatting commands like font changes and lists. Including header commands like <HTML>, <HEAD>, or <BODY> will most likely interfere with DocuShare's own HTML commands, leaving a page that is either blank or very poorly formatted. You should also avoid using any tags in Title and Summary properties that affects the vertical layout, such as IMG and list directives, because those two properties are displayed in contexts that assume simple strings.
What should I do if I cannot find an object or a document?	DocuShare provides a variety of search features to help you quickly find objects. See DocuShare searches for information on how to run a search.

Table 15–1: FAQs

Problem	Solution
I am logged into DocuShare and when I try to access an object, I receive a message that says "Not Authorized." What should I do?	Contact the object's owner, who can give you access.
I accidentally deleted a collection without deleting the objects it contained. Now I cannot find those objects. What should I do?	When you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. However, the objects are still stored on your site. Your administrator can relocate orphaned objects in a collection so you can access them again. Or, you can access an orphaned object if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Document-128).
After moving a collection to a new location, why am I unable to find it in either the new or the old location?	You accidentally orphaned the collection, which means you cannot access it from another collection. The collection is still stored in DocuShare. Your administrator can recover the orphaned collection by relocating it in a collection. Or, you can access the collection if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Collection-12).
I deleted an object from a collection. Why can I still see it when I navigate to the collection page?	If you used the browser's Back button, Favorites, or Bookmarks to navigate, you may have accessed a cached version of the collection page. Click the browser's Refresh or Reload button to display the latest version of the page.
I logged into DocuShare, navigated the site, and then used my browser's Back button a few times. Why am I now logged in as a Guest?	You have accessed a cached version of the page. Click the browser's Refresh or Reload button to display the latest version of the page. You should see your username on the navigation bar.
I use Netscape Navigator to access DocuShare. After rotating a scanned image, why does it not appear rotated?	You need to change the browser's cache setting. Open the Preferences window, and click **Advanced** then **Cache**. Under **Compare the page in the cache to the page on the network**, select **Everytime I view the page**.

Table 15–1: FAQs

Problem	Solution
Why can changing the permissions of a collection and its objects take longer than expected or time out?	The time it takes to change the permissions of a collection and its objects is dependent on the number of collection objects, which includes all nested collections and their contents. When changing the collection's permissions, DocuShare must examine each object's access list and either merge the changes or replace the access list. It is important to note that even if your browser times out, DocuShare is processing and will complete the permissions change. As an alternative, your administrator can use a command line utility to change the permissions of a collection that contains a large number of objects.

A

WebDAV folders

Using WebDAV folders

DocuShare supports the WebDAV (Web Distributed Authoring and Versioning) protocol, which enables you to access DocuShare collections and documents through a WebDAV-compliant folder. You do not need client software installed on your computer. If you are a Windows 2000 or XP user, simply go to **My Network Places** to add a DocuShare server as a network place. If you are using a Macintosh with OS X, select **Connect to Server** to add the URL for a DocuShare server.

NOTE: In both Windows and OS X, you must append the DocuShare server's URL with **/webdav**. When you are prompted to log in, use your DocuShare username and password.

Document titles in WebDAV folders

Your DocuShare administrator controls how document titles are displayed in collections. For example, a title might have a file extension appended to it. If you have any questions about how document titles are displayed, see your administrator.

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