

August 2015



# Xerox<sup>®</sup> DocuShare<sup>®</sup> User Guide



©2015 Xerox Corporation. All rights reserved. Xerox®, Xerox and Design®, and DocuShare® are trademarks of Xerox Corporation in the United States and/or other countries. BR15620

Other company trademarks are also acknowledged.

This document supports DocuShare Release 7.0.

Publication Date: August 2015

# Table of Contents

1	Introduction .....	9
	DocuShare product editions.....	9
2	Getting started .....	11
	Overview .....	11
	Accessing DocuShare .....	12
	DocuShare site spaces .....	13
	Navigating DocuShare.....	13
	Logging in and out .....	14
	How to get help .....	14
3	Managing accounts.....	15
	About accounts.....	15
	User accounts .....	15
	Creating a user account .....	15
	Viewing user account properties .....	16
	Changing your user account properties .....	16
	Changing your password .....	17
	Changing your username.....	17
	Viewing your usage quotas.....	17
	Changing your domain.....	18
	Selecting a theme.....	18
	Viewing your activity history.....	18
	Changing federation settings.....	19
	Create a user account on a federated server .....	20
	Remove an account mapping .....	20
	Deleting a user account .....	20
	Group accounts .....	20
	Creating a group.....	21
	Viewing group properties.....	22
	Changing group properties .....	22
	Viewing the usage quotas for a group.....	22
	Changing the members of a group.....	22
	Changing the owner of a group.....	23
	Changing the domain of a group.....	24
	Sending mail to group members.....	24
	Viewing the change history.....	24

	Deleting a group .....	25
	Finding and listing site accounts .....	25
<b>4</b>	<b>DocuShare spaces .....</b>	<b>27</b>
	About spaces.....	27
	Navigating a site with spaces .....	27
	Navigation bar.....	27
	Space menu .....	27
	Page footer.....	27
	Setting the home space .....	27
	Changing space properties.....	28
	Controlling access to a space.....	28
	Changing the users and groups in the membership group.....	29
	Moving space content .....	30
<b>5</b>	<b>Adding and managing content.....</b>	<b>31</b>
	About DocuShare objects .....	31
	Object permissions .....	32
	Adding objects .....	32
	Selecting the objects that appear in the Add menu .....	33
	Viewing objects in containers .....	33
	Viewing and changing object properties.....	34
	Viewing the change history.....	35
	Generating object reports.....	35
	Managing access to objects.....	36
	Viewing the access list of an object .....	36
	Changing the access list of an object .....	36
	Changing the owner of an object .....	37
	Applying permissions to the objects in a container.....	38
	Applying permissions to a document and its versions .....	39
	Changing the location of objects.....	39
	Using Copy, Cut, and Paste to change the location of an object.....	40
	Editing multiple objects in a collection.....	40
	Deleting objects.....	42
<b>6</b>	<b>Working with documents.....</b>	<b>43</b>
	About documents .....	43
	Adding a document .....	43
	Adding documents using the Add menu.....	43
	Adding documents using drag and drop.....	44
	Viewing a document.....	45
	Viewing a document and its properties.....	45
	Viewing an HTML rendition of a document.....	46

Viewing a PDF rendition of a document . . . . .	46
Adding a new document version . . . . .	46
Editing a document . . . . .	46
Uploading a new version of a document . . . . .	47
Managing document versions . . . . .	48
Viewing document versions . . . . .	48
Changing the preferred version . . . . .	48
Viewing the renditions of a version . . . . .	49
Viewing and changing version properties . . . . .	49
Locking and unlocking a document . . . . .	49
Exporting documents . . . . .	50
Adding comments to a document . . . . .	50
Scanning documents . . . . .	51
Scanning documents using scan cover sheets . . . . .	51
Creating a scan cover sheet . . . . .	51
Scanning a document with a scan cover sheet . . . . .	52
Deleting a scan cover sheet . . . . .	52
Scanning documents to a temporary scan collection . . . . .	53
Saving a scanned document to a collection . . . . .	53
<b>7 Setting up notifications . . . . .</b>	<b>55</b>
About notifications . . . . .	55
Adding a notification . . . . .	56
Viewing notifications . . . . .	57
Creating a recipient list for a notification . . . . .	57
Viewing and changing notification properties . . . . .	58
Deleting a notification . . . . .	58
Customizing notifications . . . . .	59
Customizing the subscription.tpl file . . . . .	60
The subscription.tpl file . . . . .	63
<b>8 DocuShare workspaces . . . . .</b>	<b>65</b>
About workspaces . . . . .	65
Adding a workspace . . . . .	65
Controlling access to the workspace . . . . .	66
Changing the users and groups in the membership group . . . . .	66
Re-assigning the membership group . . . . .	67
Adding content to the workspace . . . . .	68
Managing shortcuts . . . . .	68
Using calendars . . . . .	69
Changing portlet properties . . . . .	69

<b>9</b>	<b>Using social computing features.....</b>	<b>70</b>
	About social computing features.....	70
	Adding a discussion.....	70
	Adding topics, attachments, and replies to a discussion.....	71
	Viewing and deleting expired topics.....	72
	Adding a weblog.....	72
	Posting weblog entries.....	73
	Editing weblog entries.....	73
	Deleting weblog entries.....	74
	Approving weblog entries.....	74
	Adding comments to entries.....	74
	Viewing comments.....	74
	Deleting comments.....	75
	Adding a wiki.....	75
	Adding content to a wiki.....	76
	Adding content to the wiki home page.....	76
	Linking pages to a wiki.....	76
	Inserting images.....	77
	Attaching documents.....	77
	Using interwiki links.....	78
	Renaming wiki pages.....	78
	Printing wiki pages.....	78
<b>10</b>	<b>Automating work processes.....</b>	<b>80</b>
	Routing documents.....	80
	Creating a routing task.....	80
	Setting up a collection for routing documents.....	83
	Checking the status of routing tasks you assigned.....	83
	Viewing progress reports.....	85
	Publishing a new version of your routed document.....	85
	Changing the preferred document version when the review is complete..	86
	Viewing the tasks assigned to you.....	87
	Approving or disapproving a document.....	87
	Reviewing a document.....	88
	Acknowledging receipt of a document.....	89
	Removing a document sent for information.....	89
	Viewing your deleted tasks.....	89
	Viewing the routing tasks of a document.....	90
	Using content rules.....	91
	Creating a content rule.....	91
	Changing content rules.....	92
	Deleting a content rule.....	93

Managing site content rules .....	93
Copying content rules .....	94
<b>11 Running searches .....</b>	<b>95</b>
About searches .....	95
Viewing new content on your site .....	95
Searching for objects .....	96
Search options .....	96
Running an advanced search .....	97
Using reserved characters in a search .....	99
Saving a search query .....	99
<b>12 Using your personal home page .....</b>	<b>101</b>
About My DocuShare .....	101
Managing favorites .....	101
Using your personal collection .....	102
Viewing your personal collection .....	102
Using your favorite calendars .....	103
Using your personal trashcan .....	103
Viewing your groups .....	104
Viewing your routing tasks .....	104
<b>13 Archiving content .....</b>	<b>105</b>
About archiving content .....	105
Archiving content .....	105
Archiving content automatically .....	105
Archiving content manually .....	106
Restoring archived content .....	106
<b>A Task Permissions .....</b>	<b>108</b>
<b>B WebDAV folders .....</b>	<b>111</b>
Using WebDAV folders .....	111
Document titles in WebDAV folders .....	111
<b>C DocuShare portal integration .....</b>	<b>112</b>
Accessing DocuShare in a portlet .....	112
<b>Index .....</b>	<b>113</b>

# Introduction

## DocuShare product editions

Fuji Xerox provides several DocuShare product editions. Depending on which product you are using, certain features and add-ons are available.

DocuShare documentation describes all product features and add-ons. Refer to the below table to see which features and add-ons are available for your use.

### Product comparison

	DocuShare Express	DocuShare	DocuShare CPX
Full Text and Metadata Indexing	•	•	•
Document Versions, Check-in/Check-out	•	•	•
Access Control and Permissions	•	•	•
Notifications	•	•	•
Document Routing and Approval	•	•	•
Integrated View of PDF Content and Metadata	•	•	•
Guest Access, My DocuShare, WebDAV	•	•	•
Scan via Cover Sheets to Personal Collection, Documents	•	•	•
Blogs / Wikis / Comments	•	•	•
Themes	•	•	•
Quotas	•	•	•
Change History / Activity History	•	•	•
Document and Permission Reports		•	•
Read-Only User		•	•
CPX User			•
Email Agent		•	•
Federated Search Support		•	•
LDAP Support		•	•
Spaces		•	•
Content Rules			•



**Product comparison**

	DocuShare Express	DocuShare	DocuShare CPX
Document Export			•
Enterprise Workflow (DSDN)			•
Permission Icons			•
Presence Detection (user icon indicates when user is logged in)			•
Workspaces			•
Microsoft SQL Server Support		•	•
Oracle Database Support		•	•
DocuWorks	Add-on	Add-on	Add-on
Archive Server		Add-on	Add-on
Application Connector		Add-on	Add-on

# Getting started

# 2

## Overview

The DocuShare family of products allow you to easily and efficiently manage electronic content using a web browser. Using DocuShare, you can create, organize, and share content, collaborate with other users on projects, search for and retrieve content, and automate work processes.

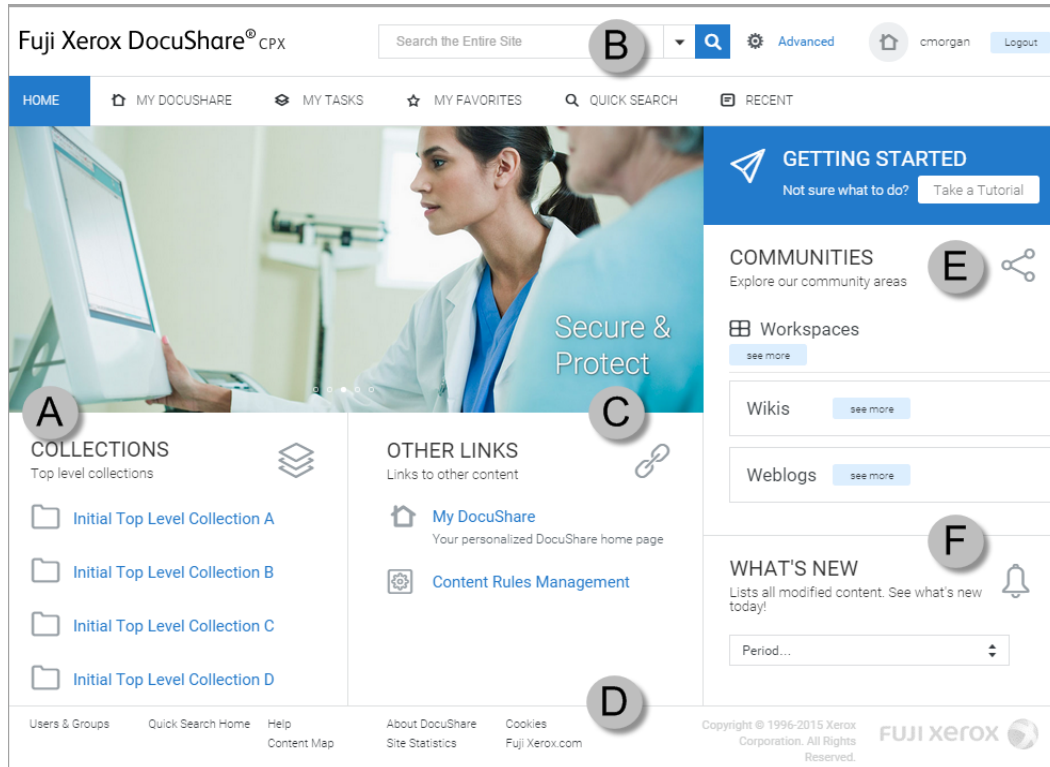
Key features in the products enable you to:

- Create and maintain your own account and personal work area without the assistance of a web master or site administrator.
- Add and control access to site content.
- Maintain multiple versions of a document, track its revision history, and lock a document to prevent simultaneous editing.
- Collaborate on content using wikis and weblogs.
- Scan paper documents to site locations.
- Route documents for approval or review.
- Create project-oriented areas for managing the content, people, and tasks.
- Set up content rules to automate a work process.

# Accessing DocuShare

You access DocuShare by entering the URL of your DocuShare site in a web browser window. Depending on how your site is set up, you may be required to log in or you see the DocuShare home page. From the site home page you can log in, as well as access the content and features on your site.

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.



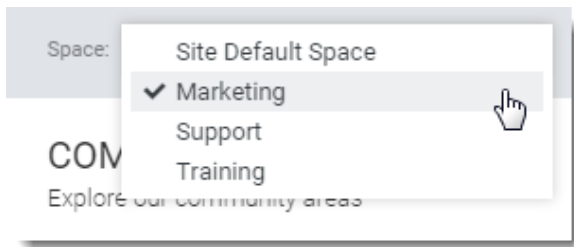
The DocuShare home page includes these features:

- A. The site's top-level collections, which your administrator sets up
- B. Navigation bar, which includes links to frequently used pages and a search area for running simple searches and accessing advanced search features
- C. Other links, which include My DocuShare, your personalized home page, and pages for other features, if available
- D. Page footer, which includes links to other DocuShare pages and help information
- E. Access to community areas
- F. What's New menu, which you can use to see the content that has been recently added or changed

# DocuShare site spaces

DocuShare provides a feature called **spaces**, which enables your administrator to separate users and content within distinct areas on your site. This provides your organization with greater control over access to content and offers customization capabilities for each space. All of the features your administrator set up for DocuShare are available within each space; you access and use these features the same, regardless of whether you are in a space or not.

If your administrator created spaces on your site and added you as a member of one or more spaces, a **Go to** menu appears below the navigation bar. The menu lists the spaces you can access. For more information on how to use spaces, see [DocuShare spaces](#).



## Navigating DocuShare

DocuShare navigation features make it easy to find what you need.

**Navigation bar**—Includes links to pages and features that are used frequently:

- Home—returns to the home page.
- My DocuShare—displays your personal home page, which includes your favorites, a personal collection, calendar and more. The link displays after you log in and on pages other than the DocuShare home page.
- My Tasks—opens in a new window to show the routing tasks assigned to you and the tasks you assigned. The link displays after you log in.
- My Favorites—opens in a new window to show items you have added to the list.
- Recent—lists the new and changed objects on your site.
- Search area—includes an area for running simple searches as well as a link to the Advanced Search page.
- 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.

**Go to menu**—On a site with spaces, enables you to switch among spaces and the main DocuShare site.

**Page footer**—Provides links to related information and:

- Users & Groups—provides links to listing, finding, and creating user and group accounts.

- **Help**—provides access to user guides, tutorials, and software downloads.
- **Content Map**—a hierarchical display of the objects on your site, based on your current location. You can click any object in the Content Map to open it. Depending on how your site is set up, this link may not appear.

**Breadcrumbs**—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.

**Location:** [Home \ Initial Top Level Collection D \ My Collection Listing](#)

## Logging in and out

Your administrator determines the access policies for your site. Therefore, you may be able to browse and view content without logging in (as a guest) or you may be required to log in before you can access any site content.

To log into DocuShare:

1. In a web browser, enter the URL of your DocuShare site.
2. In the Login area, enter your registered username and password in the fields.  
Your password is case-sensitive.
3. In the **Domain** field, select your internal domain name (if applicable).
4. If the **Retain login for future** checkbox appears, click it if you want your username and password to be retained. This will make logging into DocuShare easier in the future.

**Note:** The **Retain login for future** checkbox only appears if your administrator has configured your site to allow users to do this.

5. Click **Login**.  
Your username appears on the navigation bar, indicating that you are logged in.

To log out of DocuShare:

1. Do one of the following:
  - Close the browser window.
  - Click the **Logout** button on the navigation bar.

## How to get help

In addition to this guide, the Help Desk includes other guides and a tutorial. The Documentation page provides user guides for the features available on your site. The Training page includes a User Tutorial, which helps you get started using DocuShare by following a series of step-by-step exercises.

# Managing accounts

## About accounts

DocuShare provides two types of accounts: individual user accounts and group accounts. Your administrator determines who can create each type of account on your site. For example, your site might allow a guest (someone who can view public content) to create a user account, but require an administrator to create group accounts.

When a user account is created, either by you or an administrator, it is assigned a **user level**. The user level controls the level of access to site content and functions. One of the following user levels is specified when creating a user account:

- **Read-Only**—Allows the user to view content and manage personal content on My DocuShare.
- **DocuShare**—Allows the user to access all DocuShare content management functions.
- **CPX**—Allows the user to access all DocuShare CPX content and process management functions.

After the user account is created, the user level assigned to the account is indicated by the superscript letters appearing after the username: read-only, DS, or CPX.

**Note:** If your site uses the LDAP (Lightweight Directory Access Protocol) feature to manage user accounts, an administrator creates an account for you. To find out how your site is configured, see your DocuShare administrator.

## User accounts

To add and edit content, you must have a DocuShare user account.

### Creating a user account

If your site allows a guest 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 page footer, click **Users & Groups**.
2. Click the **Add User** link.
3. On the Add User page, enter the following information:  
**Username**—The name used to log into DocuShare.

**Password** and **Password Confirm**—The password used to log into DocuShare. Your administrator can specify that passwords adhere to a set of rules. If specified, the rules appear on the page.

Passwords are case-sensitive and must be typed as specified when logging in.

**Domain**—An organization or other entity on your DocuShare site. The menu lists internal domains only.

**User Level**—The level of access to site content and functions.

**Last Name**—The last name of the user. 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 View 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 a user's account properties:

1. Locate and select the user whose properties you want to view. To search for a user, see [Finding and listing site accounts](#) on page 25.

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

## Changing your user account properties

Another user can view, but not change, your user account properties. To change your user account properties, you must first log in.

To change your user account properties:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Edit** link.
3. Change the properties you want. Click a field name for a description of each property.
4. Click **Apply**.

## Changing your password

To change your password you must first log in. Another user cannot change your password.

**Note:** If your site uses the LDAP feature, 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.
2. On the View Properties page, click the **Change Password** link.
3. Enter your current password in the **Old Password** field.
4. Enter your new password in the **New Password** field.

Your administrator can specify that passwords adhere to a set of rules. If specified, the rules appear on the page.

5. Enter your new password in the **New Password Confirm** field.
6. Click **Apply**.

## Changing your username

To change your username, you must first log in. Another user cannot change your username.

**Note:** If your site uses the LDAP feature, 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.
2. On the View Properties page, click the **Change Username** link.
3. Enter your current password in the **Password** field.
4. Enter a new username in the **Username** field.
5. Click **Apply**.

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

## Viewing your usage quotas

Your administrator can restrict the number of documents that you own as well as the maximum size allocated to all of your documents. You can view your quotas and your current usage.

**Note:** Documents include email attachments and documents attached to discussion topics and wiki pages.

To view your usage quotas:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Quotas** link.



If set, the page displays your quotas

**Note:** When Not set (default to highest group setting) is used, DocuShare checks the quotas assigned to all the groups you are a member of and uses the highest. If none of the groups have quotas set, then your quotas default to unlimited.

3. To view your current usage, click the **Show Quota Usage** button.

The meters display your current usage information.

Should you exceed your usage quotas, you will receive an error message when you try to add another document to your site. Contact your administrator should this occur.

## Changing your domain

If your site uses domains, you can change to another internal domain on DocuShare. 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.
2. On the View Properties page, click the **Change Domain** link.
3. Select a new domain from the **Domain** menu.
4. Click **Apply**.

## Selecting a theme

Themes let you personalize the look of your DocuShare site. Four predefined themes are provided; each changes the color scheme used on site pages. The theme you select overrides any theme in use for a space. Therefore, if you want to see the theme used for a space, then do not select a theme for the site.

To select a theme:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Themes** link.
3. Select a theme.

**Note:** If you choose to not use a theme, the default theme is used.

4. Click **Apply**.

## Viewing your activity history

DocuShare keeps track of all user activity on your site, which provides an audit trail of the actions of each user. You can view your site activity only. An administrator can view the activity of all site users.

Your administrator determines whether or not the activity history feature is enabled on your site.

To view activity history:

1. Click your username on the navigation bar.
2. On the View Properties page, click the **Activity History** link.
3. From the **Activity** menu, select the type of activity you want to view.
4. From the **Object Type** menu, select an object to limit the activity displayed to a specific object type.
5. From the **Show Last** menu, select the number of activity events to display.
6. To display the activity during a specific date range, enter start and end dates.
7. Click **Go**.

Information about the activity displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

## Changing federation settings

DocuShare federation enables you to search multiple DocuShare sites to easily access content located on several servers. If your site is a member of a DocuShare federation (a **Federation** icon appears at the bottom of a DocuShare page), you must map your user account information to the other member servers that you want to access.

To map your user account:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Federation Settings** link.  
The Federation Settings page lists the servers in your federation.
3. Click the **Edit Mapping** link that appears to the right of the server to which you want to map.  
The Edit Mapping page appears. If you know your username on the server, continue with step 4. To search for your username, go to step 5.

**Note:** If you do not have an account on the server, see the procedure [Create a user account on a federated server](#) below.

4. To enter your account information, click **Enter manually** and do the following:
  - a. Enter your username, password, and domain (if applicable).
  - b. Click **Apply**.Your username appears on the Federation Settings page.
5. To select your user account from a list, click **Choose from list** and do the following:
  - a. Find your account by doing one of the following:
    - Enter part of your first name, last name, or username in the **Search** field and click the **Go** button.
    - If displayed, click **Show All** to list all user accounts.
    - Click **Show users with my email address** to display the accounts with your email address.
  - b. Select your account.

- c. Enter the password for the account.
- d. Click **Apply**.

Your username appears on the Federation Settings page.

### Create a user account on a federated server

1. On the Edit Mapping page, click the **Create a new user account on this server** link.  
The Add User page on the server on which you are creating the account appears.

**Note:** If the site does not allow guest access, you cannot create an account.

2. Enter your account information and click **Apply**.
3. Click the browser's **Back** button until you return to the Edit Mapping page on the initial server.
4. Click **Choose from list**.
5. Display your account and select it.
6. Enter your password.
7. Click **Apply**.

Your username appears on the Federation Settings page.

### Remove an account mapping

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Federation Settings** link.  
The Federation Settings page lists the servers in your federation.
3. Click the **Edit Mapping** link that appears to the right of the server whose mapping you want to remove.
4. On the Edit Mapping page, click **No user mapping**.
5. Click **Apply**.

Your username does not appear next to the server on the Federation Settings page.

## 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.

# 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 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** link 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 page footer, click **Users & Groups**.
2. Click the **Add Group** link.
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 the name of a domain. The menu lists internal domains only.
5. In the **Spam Control** field, select either **No Restriction**, **Registered Users Only** or **Group Members Only**.
6. 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.

7. Click **Apply**.  
The Pick Members for Group page appears.
8. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
9. 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
10. 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).
11. 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).
12. Click **Update**.  
The group members display on the Members page.
13. To give one or more members manage permission to the group, click the checkbox next to each member's name and click **Apply**. Manage permission allows the member to change the group's properties and membership.

## Viewing group properties

You can view the properties of any DocuShare group.

To view a group's properties:

1. Locate and select the group whose properties you want to view. To search for a group, see [Finding and listing site accounts](#) on page 25.  
The View Properties page for the group appears. Click a field name for a description of each property.

## Changing group properties

Depending on how the group was set up, 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. Locate and select the group whose properties you want to change. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Edit** link.
3. Change the properties that you want. Click a field name for a description of each property.
4. Click **Apply**.

## Viewing the usage quotas for a group

Your administrator can restrict the number of documents that each group member can own as well as the maximum size allocated to all of the documents. You can view the quotas assigned to a group.

**Note: Documents include email attachments and documents attached to discussion topics and wiki pages.**

To view the usage quotas for a group:

1. Locate and select the group whose usage quotas you want to view. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Quotas** link.

If set, the page displays the quotas.

**Note: Any quotas set for a user take precedence over the quotas set for a group the user is a member of.**

## Changing the members of a group

Depending on how the group was set up, either the logged-in owner of the group or a logged-in group member can change the members of the group.

To change a group's members:

1. Locate and select the group whose members you want to change. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Members** link.  
The Members page shows the current group members.
3. To change group members, click the **Change Membership** button.
4. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
5. 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
6. 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).
7. 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).
8. 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 you have manage permission to the group.

To change the owner of a group:

1. Locate and select the group whose owner you want to change. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Edit** link.
3. Click **Change Owner**.  
The Change Owner page appears.
4. 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 list all user accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
5. Select a name from the **New Owner** field.

6. In the **Add Owner to Group** field, click **Yes** to add the new owner to the group.
7. Click **Update Owner**.

## Changing the domain of a group

If your site uses domains, you can change a group's domain to another internal domain on DocuShare. 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. Locate and select the group whose domain you want to change. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Change Domain** link.
3. Select a new domain from the **Domain** menu.
4. 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.

To send email to the members of a group:

1. Locate and select the group that you want to send an email message to. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Email** link.
3. 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.
4. Compose your message and click **Send** to email the message to the members of the group.

## Viewing the change history

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects.

To view the change history:

1. Locate and select the group whose change history you want to view. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Change History** link.
3. From the **Change** menu, select the type of change you want to view.

4. Do one of the following:
  - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
  - If displayed, click **Show All** and then choose the user from the **Select User** menu.
  - Choose **All** from the **Select User** menu.
5. From the **Show Last** menu, select the number of change events to display.
6. To display the activity during a specific date range, enter start and end dates.
7. Click **Go**.

Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

## Deleting a group

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

To delete a group:

1. Locate and select the group that you want to delete. To search for a group, see [Finding and listing site accounts](#) on page 25.
2. On the View Properties page, click the **Delete Group** link.

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

## Finding and listing site accounts

From the User and Group 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 page footer, click **Users & Groups**.
2. On the User and Group List page, select the type of account you want to find in the **Show** field.
3. When searching for a user, you can filter the results by selecting a single user level or all levels from the **User Level** menu. You can also filter by active or inactive status and domain.
4. In the **Search** field, enter any part of a username or group title.
5. Click **Go**.

The search results display, listing the users, groups, or both who match the search text and the filters you set.



To list the accounts on your site:

1. On the User and Group List page, select the type of account you want to list in the **Show** field.
2. Click **Show All** (if displayed).

The list of all registered accounts displays.

When displaying the list of accounts as a CPX user, the User and Group List page enables you to see which users are logged into DocuShare. The user icon next to the user's name indicates whether or not the user is logged in; the icon is grayed when the user is not logged in.

# DocuShare spaces

# 4

## About spaces

Spaces enable your administrator to separate users and content within distinct areas on your site. This provides your organization with greater control over access to content and offers customization capabilities for each space. Your administrator or a user with the necessary permissions can specify the type of content that can be added to a space as well as the look of the web pages within a space.

If your administrator created spaces on your site and added you as a member of one or more spaces, a **Space** menu appears below the Getting Started area. The menu lists the spaces you can access.

## Navigating a site with spaces

A DocuShare site with spaces includes additional links and menus for navigating the site.

### Navigation bar

On a site with spaces, the navigation bar includes two home links: one for the home page of the main DocuShare site (**Home**) and one for the home page of the space you are currently in (**Space**). These links appear when you are in a space.

### Space menu

The space menu is provided below the navigation bar. The menu enable you to navigate among the spaces you are a member of and the main DocuShare site.

- When on a home page (site or space), use the space menu to switch to another home page.
- When on a My DocuShare page, use the space menu to switch to another My DocuShare page.

### Page footer

When in a space, any link for a page in the space is preceded by the word **Space**; for example, Space Content Map. Moving your mouse over the word Space displays the space name.

### Setting the home space


Your user account property **Home Space** lets you set which personal home page, called My DocuShare, appears after you log in. By default the site My DocuShare page appears after logging

in. Click your username on the navigation bar to access your user account properties and to change the **Home Space**.

## Changing space properties

You can change the properties of a space if you are the logged-in owner of the space or a logged-in user with the necessary permission to it. Properties that are unique to a space are the object classes and themes.

To change the properties of a space:

1. Next to the space name, click the **Properties**  icon.
2. On the Properties page, click the **Object Classes** link.
3. On the Object Class List, disable the objects you do not want users to add to the space and click **Apply**.

**Note:** If the object currently appears in the space, you cannot disable it.

4. Click the **Themes** link.
5. On the Themes page, click the color scheme you want to use for the pages in the space and click **Apply**.

**Note:** If you have a theme selected for your main DocuShare site, the theme you select for a space will not take effect. Check your user properties and make sure **Do not use themes** is selected (click your username and then click the Themes link).

## Controlling access to a space

Each space has a membership group, which controls the users and groups that have access to the space. To change who can access the space, you simply change the members of the space membership group. Any user or group that you add to the group is assigned full read and write permissions to the space. You can choose to give the group manage permission to the space.

**Note:** A user who is not a member of a space membership group can be given permission to a space object and can therefore search for and access the space object. However, the user cannot access the space.

## Changing the users and groups in the membership group

If you are a member of the membership group with manage permission, you change the users and groups in the group.

To change the members of the membership group:

1. On the footer, click **Users & Groups**.
2. In the **Show** field, select **Groups**.
3. Do one of the following:
  - To find the group, enter part of the group's title in the **Search** field. Click the **Go** button.
  - To display all groups, click **Show All**.
4. From the displayed list, click the group title.
5. On the Properties page, click the **Members** link.  
The Members page appears showing the current members.
6. 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 Members page appears.
12. To give one or more members manage permission to the group, click the checkbox next to each member's name and then click **Apply**. Manage permission allows the member to change the group's properties and membership.

# Moving space content

If you have the necessary permissions, you can move content between spaces as well as between a space and the main DocuShare site:

To move space content:

1. Locate the content that you want to move.
  2. Click the checkbox that appears next to the each object's title.
  3. From the **Edit Selected** menu, select **Cut**.
  4. On the Confirm Cut and Add to Clipboard page, choose whether or not to remove any objects from the clipboard *before* the cut.
  5. Click **Confirm**.
  6. Navigate to the space or to the main DocuShare site in which you want to move the content.
  7. Open the container in which to move the content.
  8. From the **Edit Selected** menu, select **Paste (Move) to Space**.
  9. On the Confirm Paste Objects from Space page, click **Confirm**.
- The content you cut appears in the new location.

# Adding and managing content













## About DocuShare objects

You create content on your site by adding different types of DocuShare objects. You organize site content in container objects called collections. Using the CPX feature, you manage the content and resources associated with projects in objects called workspaces. Objects that you can add to collections and workspaces include: documents, collections, calendars, discussions, weblogs, wikis, and URLs.






DocuShare identifies each object on your site with a unique handle (for example, Document-37 and Calendar-102). The type and number of objects on your site are dependent on your organization's needs.

Each DocuShare object is indicated by an icon.

### DocuShare icons

DocuShare object and its icon	
 <b>User</b> —A registered DocuShare user.	 <b>Group</b> —One or more DocuShare users, groups, or both.
 <b>Collection</b> —A container for storing DocuShare objects.	 <b>Document</b> —A document stored on the DocuShare site. The icon can vary, depending on the document's file type.
 <b>Document Storage Workspace</b> —A collaborative workspace for a document-intensive project.	 <b>Team Project Workspace</b> —A collaborative workspace for a team project. It includes a calendar and a collection for online meeting URLs.
 <b>Wiki</b> —A collaborative web site.	 <b>Weblog</b> —A simple web site for frequent postings.
 <b>Discussion</b> —An online forum where topics can be posted.	 <b>Topic</b> —A posting to a discussion.
 <b>Calendar</b> —An online monthly or weekly calendar.	 <b>Event</b> —A calendar entry.

## DocuShare icons

DocuShare object and its icon	
 <p><b>Mail Message</b>—An email message.</p>	 <p><b>Saved Query</b>—Saved search query terms that can be used for a search.</p>
 <p><b>Notification</b>—Email notification after a change occurs to a specified object.</p>	 <p><b>Content Rule</b>—A configurable rule for running an action after a change occurs to a specified object.</p>
 <p><b>URL</b>—An Internet address for a web page.</p>	

## Object permissions

Every DocuShare object has an **access list**, which identifies the users and groups who have permissions to the object and the type of permission each account has. The type of permission controls what a user can do with the object.

DocuShare provides the following six permissions:

Permissions
<b>Read Properties</b> allows the user or group to view the object's properties and permissions.
<b>Read Content</b> allows the user or group to read the content of the object.
<b>Read History</b> allows the user or group to view the object's change history.
<b>Write Properties</b> allows the user or group to change the object's properties.
<b>Write Content</b> allows the user or group to add new objects, including new versions of documents, and change the object, such as its location.
<b>Manage</b> allows the user or group to delete the object, and change the object's permissions and owner.

In addition, the **Search Available To** property controls who can see an object in a search results list.

[Task Permissions](#) on page 108 details the type of permission required for each object task.

## Adding objects

You can add an object to your site if you are logged in and have the required permission to the container. You can add any type of object to collections and workspaces. You can add events to calendars and topics to discussions.

To add an object:

1. Navigate to and open the container to which you want to add an object.
2. From the **Add** menu, select the type of object that you want to add.

The Add page appears.

3. In the **Title** field, enter a name for the object. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Enter any additional required information as well as 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 object is added to the container.

For more information on adding documents, see [Adding a document](#) on page 43. For more information on adding discussions, weblogs, and wikis, see [Using social computing features](#) on page 70.

## Selecting the objects that appear in the Add menu

You can control what type of objects users can add to your collections by adding or removing items from the **Add** menu.

To modify the **Add** menu:

1. Navigate to the collection that you want to change.
2. Click the collection's **Properties** icon.
3. On the View Properties page, click the **Add Menu Objects** link.
4. On the **Add Menu Objects** page there will be a list of the possible objects that can appear in the **Add** menu. Select the ones that you want to appear in the **Add** menu. To select multiple accounts, use the Ctrl key (Windows) or the Command key (Macintosh).
5. Click **Apply**.
6. Navigate back to your collection listing and click the **Add** menu. Only the objects you selected appear in the menu.

## Viewing objects in containers

When viewing objects in a collection or events in a calendar, you can change how the objects are displayed in the container. In addition, you can control the number of objects to display per page.

You can display a collection in any of the following views:

- **List view**—Displays objects in a list.
- **Images view**—Displays image files as thumbnails and all other object types as large icons.



- **Email view**—Displays the properties associated with email messages.

You can display a calendar in any of the following views:

- **Month view**—Use the **31** button to display 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**—Use the **7** button to display 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**—Use the **1** button to display 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.

To set the number of objects to display per page:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Edit** link.
3. In the **Page Size** field, enter the number of objects you want to view on pages with object listings (for example, collections and search results).
4. Click **Apply**.

## Viewing and changing object properties

Every object has a set of assigned 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. You can assign property values to objects, which allows you to categorize objects, provide information about objects to other users, and facilitate searches.

To view and change the properties of an object:

1. Locate the object whose properties you want to view and change.
2. Click the object's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
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**.

## Viewing the change history

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. Your administrator determines whether or not the change history feature is enabled on your site.

To view the change history:

1. Locate the object whose change history you want to view.
2. Click the object's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. To filter the change history results, do one of the following:
  - To view the changes a particular user made, enter part of the user's name in the **Search for User** field and then choose the user from the **Select User** menu.
  - Click **Show All** (if displayed) and then choose the user from the **Select User** menu.
  - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

## Generating object reports

From a collection listing or a Search Results page, you can generate an object report by exporting DocuShare property information. Your administrator determines which properties display in the report. The generated report is in tab-separated values format, which enables you to open the report in a spreadsheet application.

To generate an object report from a collection listing:

1. Open the collection that contains the objects that you want detailed in the report.
2. To select individual objects, click the checkbox next to each object.

**Note:** Do not click any checkboxes if you want all of the objects in the report.

3. From the **Edit Selected** menu, select **Generate Report**.
4. In the file download window, choose the option to save the report.

To generate a object report from a Search Results page:

1. Run a search to find the objects that you want in the report.
2. To select individual objects, click the checkbox next to each object.

**Note:** You can click the checkbox to the left of the **Type** column heading to select all of the objects. If there are multiple search pages, select **Show All** from the **Show** menu first.




- From the **Edit Selected** menu, select **Generate Report**.
- In the file download window, choose the option to save the report.

## Managing access to objects

When you add an object to your site, you set the object's initial permissions. As the user who added the object, you are its owner and have full permission to it. As needed, you can change the users and groups in the access list and the type of permissions each user or group has.

Depending on how your administrator set up your site and if you are a CPX user, colored key icons may appear next to objects indicating who can access the objects. You can click the **key** icon next to an object to display its Permissions page.

### Permission icons

Permission icon and its description	
	<b>Green key</b> —Indicates that the object can be accessed by anyone.
	<b>Yellow key</b> —Indicates that the object can be accessed by one or more groups.
	<b>Gray key</b> —Indicates that the object can be accessed by individual users.

## Viewing the access list of an object

To view an object's access list:

- Locate the object whose access list you want to view.
- From the object's **More Actions** menu, select **Permissions**.

The Permissions page displays the users and groups in the access list and the permissions each account is assigned.

## Changing the access list of an object

To change an object's access list:

- Locate the object whose access list you want to change.
- Do one of the following:
  - From the object's **More Actions** menu, select **Permissions**.
  - If displayed, click the **key** icon that appears to the right of the object's title.

The Permissions page for the object appears.

3. For **Search Available To**, do one of the following:
  - 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 in the object's access list that have at least Reader or Read Properties permission to see the object in a search results list.
4. 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.
5. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
6. 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
7. 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).
8. 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).
9. Click **Update Access List**.

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

**Note:** When you change the access list and permissions of an object, the change occurs in the background. A link to your background jobs appears under the navigation bar; you can click the link to check the status of and delete background jobs.

## Changing the owner of an object

The default owner of an object is the user who initially created the object.

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**.
  - From the object's **More Actions** menu, select **Permissions**. On the Permissions page, 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite user accounts, click **Show Favorites**.
4. Select a username from the **New Owner** field.
5. If the object is a document, see [Applying permissions to a document and its versions](#) on page 39.
6. If the object is a collection, see [Applying permissions to the objects in a container](#) on page 38.
7. 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 full permissions.

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

## Applying permissions to the objects in a container

When you change the permissions of a container 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.

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

1. Locate the container whose permissions you want to change.
2. From the container's **More Actions** menu, select **Permissions**.

The Permissions page for the container appears.
3. Make the changes you want to the access list.
4. 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.
5. 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 objects that appear in multiple locations**—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 objects that appear in multiple locations**—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.
6. Click **Apply**.

## Applying permissions to a document and its versions

Each version of a document has its own access list. Therefore, when you change a document's permissions you can choose how you want to apply the changes to the document's versions.

To apply a document's permissions to its versions:

1. Locate the document whose permissions you want to change.
2. From the document's **More Actions** menu, select **Permissions**.  
The Permissions page for the document appears.
3. Make the changes you want to the access list.
4. 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.
5. Click **Apply**.

## Changing the location of objects

You can move an object to another container or have the object appear in several containers on your site. Although an object can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

**Note:** You can also use the **Copy, Cut, and Paste** commands from the **Edit Selected** menu to change the location of a collection. See [Using Copy, Cut, and Paste to change the location of an object](#) on page 40.

To change the location of an object:

1. Locate the object whose location you want to change.
2. Do one of the following:
  - Click the checkbox that appears next to the object'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 object's title. On the Properties page for the object, click the **Locations** link.  
The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
  - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
  - To list all containers, click **Show All** (if displayed).

- To display your favorite containers, click **Show Favorites**.
- 5. In the **Possible Locations** field, select the containers in which you want the object to appear and click the **Add** button. To select multiple containers, use the Ctrl key (Windows) or the Command key (Macintosh).
- 6. In the **Selected Locations** field, select any containers in which you do not want the object to appear and click the **Remove** button. To select multiple containers, use the Ctrl key (Windows) or the Command key (Macintosh).

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

7. Click **Update Locations**.

## Using Copy, Cut, and Paste to change the location of an object

To copy or cut objects:

1. Locate the object that you want to copy or cut.
2. Click the checkbox next to the object.
3. From the **Edit Selected** menu, select either **Copy** or **Cut**.  
A confirm window appears.
4. Choose whether or not to remove any objects from the clipboard *before* the copy or cut.
5. Click **Confirm**.

**Note:** When using the **Cut** command, the object title is faint until you **Paste** it to another container.

6. Open the container in which you want to paste the object.  
**Note:** To paste a workspace, open the workspace in which you want to paste the object and then click **Content Map**.
7. From the **Edit Selected** menu, select **Paste**.  
A confirm window appears.
8. Choose whether or not to remove any objects from the clipboard *after* the paste.
9. Click **Confirm**.

The object appears in the container.

## 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. The menu includes these commands:

- **Add to Favorites**—Add the object to **Favorites** on My DocuShare.

- **Archive and Restore**—Move the object to and retrieve the object from an Archive Server (commands appear if your site uses an Archive Server). See [Archiving content](#) on page 105 for more information.
- **Change Location**—Add the object to another location.
- **Change Owner**—Change the owner of the object.
- **Copy**—Copy a reference of the object to the clipboard. You have the option of clearing the objects on the clipboard before you copy your selected objects. The clipboard can contain a maximum of 100 objects.
- **Copy Shortcuts**—Copy a reference of the object to the clipboard so it can be pasted to a shortcuts portlet on a workspace. You have the option of clearing the objects on the clipboard before you copy your selected objects.
- **Cut**—Cut the object to the clipboard. You have the option of clearing the objects on the clipboard before you cut your selected objects. The clipboard can contain a maximum of 100 objects.
- **Paste**—Paste the object from the clipboard (command appears when an object has been copied or cut to the clipboard).
- **Paste (Move) to Space**—Paste the object from the clipboard to a space or the main DocuShare site (command appears if your site uses spaces and when an object from a space or the main DocuShare site has been cut to the clipboard). See [DocuShare spaces](#) for more information.
- **Delete**—Remove the object from your site.
- **Rename**—Change the title of the object.
- **Route**—Send the document to users for approval, review, or information. See [Automating work processes](#) on page 80 for more information.
- **Generate Report**—Exports DocuShare property information to a report. See [Generating object reports](#) on page 35.
- **Zip and Download**—Download documents and collections by first zipping them.

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 the command you want.  
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 objects

DocuShare provides both a site-wide trashcan and a personal trashcan for each user. Your administrator determines which trashcans are used on your site. If your site uses both the site-wide trashcan and personal trashcans, your trashcan appears on your My DocuShare page. When you delete an object, it goes to your personal trashcan. You can restore and expunge an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See [Using your personal home page](#) on page 101 for more information.

If your site uses the site-wide trashcan only, then objects you delete go to it. To restore an object from the site-wide trashcan, you need to contact your administrator. If trashcans are not used on your site, deleted objects are expunged immediately.

To delete an object:

1. Locate the object that you want to delete.
2. Do one of the following:
  - Click the checkbox that appears next to the object's title. From the **Edit Selected** menu, select **Delete**.
  - From the object's **More Actions** menu, select **Delete**.

The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the object, then you do not have manage permission to the object and cannot delete it.

3. If you are deleting a collection, select one of the following from the **For collections, delete** menu:
  - **Collection and Contents** to delete the collection and all of the objects in it.
  - **Collection Only** to delete the collection, but not its contents.

**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.

4. Click **Delete** to remove the object from your site.

# Working with 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 documents from your computer or a network drive or by scanning paper documents. With the documents stored on DocuShare, 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 and document locking. 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, edit, and route the document. By default, a document's preferred version is its latest version.

## Adding a document

You add a document to a collection or workspace to make it available to others for viewing or collaborative work. There are several ways to add documents.

### Adding documents using the Add menu

Using the **Add** menu, you can upload a document and make it available immediately, or you can create a placeholder for a document and add it later.

To add a document using the **Add** menu:

1. Navigate to and open the container to which you want to add the document.
2. From the **Add** menu, select **Document**.  
The Add Document page appears.
3. In the **Add Document By** field, select one of the following:
  - **Uploading a document now** to upload a document immediately.
  - **Scanning a document using a cover sheet** to scan a paper document. This option appears if scanning is set up on your site. This will cause a placeholder document to be added. The placeholder does not contain any content; you add content to the placeholder by scanning a document using a cover sheet.

- **Uploading a document later** to upload a document at a later time. This will cause a placeholder document to be added. The placeholder does not contain any content; you add content to the placeholder by uploading a new version.
4. If you are uploading a document now, click the **Choose File** button to navigate to the document and select it.
  5. Enter the following information:
    - Title**—The title of the document. The title can contain spaces and punctuation marks.
    - Max Versions**—The maximum number of versions to save. Once the maximum number of versions is reached, when a new version of a document is saved to DocuShare, the oldest version is deleted, unless it is the preferred version.
  6. Enter any optional information. Click a field name for a description of each property.
  7. Click **Apply**.

If you are uploading a document, it is added to the container. If you are scanning a document, a cover sheet appears. Print the cover sheet. For information on how to use the cover sheet, see [Scanning a document with a scan cover sheet](#) on page 52. If you are uploading a document later, you can add the document content by adding a new version. See [Uploading a new version of a document](#) on page 47.

If you chose to route the document, a Routing Slip appears. For information on how to use the Routing Slip, see [Managing access to objects](#) on page 36.

## Adding documents using drag and drop

You can also add documents by dragging and dropping them into a collection. There are two options available when using this method: upload instantly or fill in properties and then upload.

To add a document using drag and drop:

1. Navigate to and open the collection to which you want to add the document.
2. Using your file manager, locate the document you want to add to DocuShare.
3. Click the document in your file manager and drag it to the collection.
4. Do one of the following:
  - If you would like to add the documents quickly and enter the file information later, drop the document onto the rectangle labeled **Drop files here to instantly upload them as Documents**. The document will be uploaded. The filename will appear as the title of the document.
  - If you would like to add the document and add properties such as Title, Author and the Max Versions, drop the document onto the rectangle labeled **Drop files here to select a type and fill details before uploading**.

**Note:** With either method, you can add several files at once. Use the Ctrl key and drag and drop the group of files to either rectangle.

# Viewing a document

To view a document, you either open the document directly in the browser or first download it and then open it. Downloading the document copies it and keeps the original document on DocuShare.

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, different browsers behave differently. For some documents, such as Microsoft Word and Excel, your browser may launch a **helper application (viewer)** to run or display the document either outside or within the browser window. To play some 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.

To view a document:

1. Locate the document that you want to view.
2. Click the document's title. At this point, depending on your browser:
  - The document will open.
  - A window will appear allowing you to view the document.
  - A window will appear allowing you to download the document. Once it has downloaded, you will need to open it.
3. To return to the container page after opening the document, 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 a document and its properties

For PDF documents, a variety of image documents (GIF, JPEG, PNG, TIFF), and other document formats, you can view the document content while viewing and editing the document's properties.

**Note:** To view Microsoft Word and PowerPoint documents, you should use Internet Explorer. Also, make sure your Folder Options are configured to open each document type within the same browser window.

To view a document and its properties:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View Document & Properties**.  
Both the document and its properties display in a separate window.
3. Change any of the properties and click **Update**.

4. Click **Close** to close the window.

## 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.

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

To view an HTML rendition of a document:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View in HTML**.  
DocuShare converts the document to HTML and displays the document.
3. Click the browser's **Back** button to return to the container page.

## Viewing a PDF rendition of a document

DocuShare provides a PDF conversion feature that lets you view supported document types in PDF format. This feature eliminates the need to configure your browser to display certain document types.

**Note: The PDF conversion feature cannot convert documents that contain encrypted information. You must have Adobe® Reader® installed on your computer.**

To view a PDF rendition of a document:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View in PDF**.  
DocuShare converts the document to PDF and displays the document.

## Adding a new document version

There are two ways to add a new document version:

- Check out and edit an existing document, and check in the revised document as a new version.
- Upload a document as a new version of an existing document.

## Editing a document

DocuShare supports the complete development cycle of a document, allowing users to collaborate on a project. Document check out and locking 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 the appropriate permission to it. In addition, the DocuShare administrator must have set the **Add Versions** property to **Allowed**.

To edit a document:

1. Locate the document that you want to edit.
2. Click the document's **Check Out** icon.  
A window appears allowing you to open or download the document.
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 container page, click the document's **Upload a New Version** icon.  
The Add Version page appears.
7. Click the **Browse** button.
8. 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.
9. In the **Title** field, you can change the version title. By default, the new version is assigned the original document title.
10. Optionally, enter any comments in the **Version Comments** field.
11. If you locked the document, choose whether or not you want to unlock the document after adding the new version in the **Unlock Document** field.
12. 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.
13. Click **Apply**.

## Uploading 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 of a document:

1. Locate the document that you want to update with a new version.
2. From the document's **More Actions** menu, select **Upload a New Version**.  
The Add Version page appears.
3. Click the **Choose File** button.

4. Navigate to the location that contains the document you want to add as a new version, select it, and click **Open**.
5. In the **Title** field, you can change the document title. By default, the new version is assigned the original document title.
6. Optionally, enter any comments in the **Version Comments** field.
7. 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.
8. 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, 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.

### Viewing document versions

To view a document's version history:

1. Locate the document whose version history you want to view.
2. Click the document's **Properties** icon.  
The View Properties page appears.
3. Click the **Version History** link.  
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, edit, and route the document. 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 the **Change Preferred Version** button.  
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 close the renditions view.

## Viewing and changing version properties

To view and change a version's properties:

1. Display a document's Version History page.
2. Click the document version's **Properties** icon.  
The View Properties page appears.
3. Click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

# Locking and unlocking a document

You can lock a document when you want to keep other users from editing it. To allow users to edit a locked document, you need to unlock the document. To unlock a document, you must be the



logged-in user who locked the document. A document is locked if a **Lock** icon appears next to the document icon.

To lock a document:

1. Locate the document that you want to lock.
2. From the document's **More Actions** menu, select **Lock**.

A **Lock** icon appears next to the document icon. Users can view the document, but they cannot edit it.

To unlock a locked document:

1. Locate the document that you want to unlock.
2. From the document's **More Actions** menu, select **Unlock**.

A **Lock** icon no longer appears next to the document icon. Users can now edit the document.

## Exporting documents

Your administrator can set up locations on external servers to which you can export documents. You can export a single document or several documents at a time.

To export a document:

1. Locate the document that you want to export.
2. Click the checkbox that appears next to the document's title.
3. From the **Edit Selected** menu, select **Export Document**.  
The Confirm Export Document page appears.
4. In the **Location** field, select the external location for the document.
5. Click the **Confirm** button.

## Adding comments to a document

You can post comments to a document to maintain an informal commentary on it. For instance, when co-authoring a document, you can add helpful comments for the other document authors.

To post a comment on a document:

1. Locate the document on which you want to post a comment.
2. From the document's **More Actions** menu, select **Comments**.
3. If there are current comments on the document, click the **Add a comment** link.

The Add Comments page appears.

4. In the **Title** field, enter a name for the comment.
5. In the **Description** field, enter the comment text.

6. Click **Apply**.

You can view the comments on a document by clicking its **Comments** icon. To edit a comment, click the comment's **Edit** icon.

## Scanning documents

You can add documents to your DocuShare site by scanning them. DocuShare provides two methods for scanning documents:

- You can use a scan cover sheet to scan documents to specific locations and as new document versions. At a multifunction device, you scan a cover sheet with a document to convert it to PDF format and add the digital document to DocuShare as specified in the cover sheet.
- You can scan documents to a temporary scan collection that your administrator sets up on your site. Using an ApeosPort with the Scan to PC feature, you scan a document to convert it to TIFF format and add the digital document to the temporary scan collection. You then save the scanned document to a permanent collection on your site.

Your administrator determines which method you can use for scanning documents. Therefore, check with your administrator to find out how your site is set up.

### Scanning documents using scan cover sheets

You can scan documents to specific locations and as new document versions using scan cover sheets. You can create scan cover sheets for these types of objects:

- documents—to scan a document as a new document version
- collections—to scan a document to a collection
- workspaces—to scan a document to the content portlet of a workspace
- user—to scan a document to your personal collection

A scan cover sheet includes a **DataGlyph**, which encodes machine-readable information about the scan location and the cover sheet owner. You place the cover sheet on top of a document and scan both to add the resulting PDF document to DocuShare.

In addition, you can choose to create a cover sheet for a document when using the Add Document page to upload a document. For more information, see [Adding a document](#) on page 43.

### Creating a scan cover sheet

To create a scan cover sheet:

1. Do one of the following:
  - To create a cover sheet for a document, collection, or workspace, locate the object. Then click the object's **Properties** icon.

- To create a cover sheet for your personal collection, click your username on the navigation bar.

**Note:** On a site with spaces, you cannot create a scan cover sheet from your View Properties page. Instead, go to My DocuShare in the space and open your personal collection. From the More Actions menu, click Scan Cover Sheet.

2. On the View Properties page, click the **Scan Cover Sheet** link.
3. Click the **Create Scan Cover Sheet** link.  
The cover sheet is created and opens in a separate window.
4. Print the cover sheet. Then close it.  
The Scan Cover Sheet page lists the cover sheet and provides the date and time at which it was created.

## Scanning a document with a scan cover sheet

If you have access to a multifunction device that supports Scan to File, you can scan a cover sheet with a document to add a PDF version of the document to DocuShare.

**Note:** Since the user interface for multifunction devices can vary, the following procedure provides general steps for scanning a document to DocuShare.

To scan a document:

1. Put the cover sheet on top of a document and place the pages in the document feeder.
2. Display the scan to file screen.
3. Follow any instructions specific to the type of device.
4. Press the **Start** button.

The device scans the document and then adds it to DocuShare as specified in the cover sheet.

## Deleting a scan cover sheet

When you no longer want a cover sheet to be used to scan a document, you can delete it. Deleting the cover sheet invalidates any printed copies of it. You might want to delete a cover sheet if you misplace it and do not want anyone else to use the cover sheet.

To delete a scan cover sheet:

1. Locate the object whose cover sheet you want to delete.
2. Click the object's **Properties** icon.
3. On the View Properties page, click the **Scan Cover Sheet** link.
4. Click the **Trashcan** icon that appears to the right of the cover sheet.

## Scanning documents to a temporary scan collection

If you have access to an ApeosPort with the Scan to PC feature enabled, you can scan documents to DocuShare. Your ApeosPort administrator must set up an address before you can scan documents to DocuShare.

**Note:** Depending on which ApeosPort model you use, the steps for scanning a document can vary.

To scan a document:

1. Place a document on the document glass or in the document feeder.
2. Press the **Scan to PC** button.
3. Press **Address Book**.
4. Select a **Server for DocuShare Scan** and then press the **Save** button.

**Note:** Contact your administrator if you cannot find a **Server for DocuShare Scan** in the **Address Book**.

5. In the **File Format** area, press the **More** button, select **Multi-page TIFF**, and then press the **Save** button.
6. Press the **Start** button.

**Note:** If ApeosPort is set up with a folder for documents scanned to the **Watched Folder**, the scanned document is not stored in the **ApeosPort Scan Repository**.

The ApeosPort scans the document and then sends it to the temporary scan collection on your DocuShare site. The document is stored in this collection for a designated time period. You can check the time period by clicking **ApeosPort Scan Repository** 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:

1. Go to the DocuShare home page.
2. Click **ApeosPort Scan Repository**.
3. Locate your scanned document.
4. 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.

5. If you want to rotate the document, select the number of degrees from the **Rotate Image** menu and click **Go**.
6. 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.

7. 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.
8. In the **Sort By** field, select **Title** to display the collections in alphabetical order or select **Handle** to display the collections in numerical order.
9. Do one of the following:
  - To find specific collections, enter any part of a collection title in the **Search** field. Click the **Go** button.
  - To list all collections, click **Show All** (if displayed).
  - To display your favorite collections, click **Show Favorites**.
  - To display your personal collection, click **Show Personal Collection**.
10. In the **Possible Locations** field, select the collection to which you want to save the document.
11. Click **Apply**.
12. In the **Title** field, enter a title for the document.
13. Enter any additional information. Click a field name for a description of each property.
14. 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.

# Setting up notifications

## About notifications

A notification allows you to receive an email message when a change occurs to an object. You can add a notification for any object on your site. For example, you can add a notification for a document to have DocuShare email you when a new version of the document is uploaded. You might want to add a notification for a collection to know when new content is added to the collection.

To use notifications, your administrator must enable and set up the feature. In addition, your user account properties must include an email address.

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

- **Any change**—Any change to the object.
- **Something added**—A new object is added to a container.
- **New document version added**—A new version of a document is added.
- **Something deleted**—An object is deleted from a container.
- **Properties edited**—The properties of the object are changed.
- **Permissions edited**—The permissions of the object are changed.
- **Change in ownership**—The owner of the object is changed.
- **Location edited**—The location of the object 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:** DocuShare offers feeds to site collections and other types of containers. If you are using a browser with built-in feed support or you have a feed reader installed on your computer, you can add a feed to a DocuShare container. This enables you to view updated content in the container, provided you have the necessary permissions, without having to go to the DocuShare site in your browser.

# Adding a notification

You can quickly add a simple notification to have DocuShare email you when new content is added to an object, or you can choose advanced options to customize the notification.

To add a notification:

1. Locate the object for which you want to add a notification.
2. Do one of the following:
  - From the **More Actions** menu, click the object's **Notifications** icon.
  - Click the object's **Properties** icon. Then click the **Notifications** link.
3. On the Notifications page, click **Create a New Notification**.
4. 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.
5. To select advanced options, click **Show Advanced Options** and choose from the following:
  - Events of Interest**—The event or events of which you want to be notified. To select multiple events, use the Ctrl key (Windows) or the Command key (Macintosh).
  - Include Recipient Activity**—Specifies whether or not to also notify the user whose action caused the notification. Select **Yes** to notify the user; otherwise, select **No**.
  - External Recipients**—The email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma. This field is optional.
  - Sender**—The username that appears in the email message **From** field: **Admin** or **Owner**.
  - Notification Applies To**—If the object is a collection or a workspace, specifies how to apply the notification to the collection and the objects in it.
  - Initial Permissions**—Specifies the permissions for the notification.

**Note:** If you are an administrator, additional fields appear enabling you to have a script run when an event of interest occurs. Before entering information in the fields, you must create a script and place it in the extension folder of your DocuShare directory. In the **Script** field, enter the name of the script that you want to run when the event of interest occurs. In the **Script Data** field, enter any string values that you want to pass to the script when it is called.
6. Click **Apply**.

**Note:** If you are receiving too many email messages from notifications, you can choose to not receive messages for one or more types of events for all of your notifications. Click your username on the navigation bar and use the **Suppress Notification Messages** menu on the **Edit** page to turn off the events you want.

## Viewing notifications

You can easily view the notifications added for an object as well as the notifications you own for site objects.

To view an object's notifications:

1. Locate the object whose notifications you want to view.
2. Do one of the following:
  - From the **More Actions** menu, click the object's **Notifications** icon.
  - Click the object's **Properties** icon. Then click the **Notifications** link.

The object's current notifications display.

To view your notifications:

1. On the navigation bar, click your username.
2. On the View Properties page, scroll to locate the **Subscribed To** property.

The notifications you added for objects display in the field. You can click a notification to view its properties.

## Creating a recipient list for a notification

You can create a recipient list for a notification 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 uploaded or when an object is moved to another location.

To create a recipient list for a notification:

1. Locate the object that has the notification for which you want to create a recipient list.
2. Do one of the following:
  - From the **More Actions** menu, click the object's **Notifications** icon.
  - Click the object's **Properties** icon. Then click the **Notifications** link.

The object's current notifications display.

3. Click the **Properties** icon that appears to the right of the notification you want to change.

The View Properties page appears.

4. Click the **Recipients** link.
5. Click **Change Recipients**.
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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
8. 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).
  9. 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).
  10. Click **Update**.

## Viewing and changing notification properties

When you add a notification, a default name is assigned to it. You may want to change the name to something more descriptive as well as change other properties.

To view and change an object's notification properties:

1. Locate the object whose notification properties you want to view and change.
2. Do one of the following:
  - From the **More Actions** menu, click the object's **Notifications** icon.
  - Click the object's **Properties** icon. Then click the **Notifications** link.

The object's current notifications display.

3. Click the **Properties** icon that appears to the right of the notification you want to change.  
The View Properties page appears.
4. Click the **Edit** link.
5. Change the properties you want. Click a field name for a description of each property.
6. Click **Apply**.

## Deleting a notification

Depending on how your site is set up, a deleted notification can go to either your personal trashcan on My DocuShare or the site-wide trashcan. Contact your administrator to find out which trashcans are used on your site. If you have a personal trashcan, you can restore an object from it as long as your administrator has not expunged the object from the site-wide trashcan. See [Using your personal home page](#) on page 101 for more information.

To delete a notification:

1. Locate the object with the notification you want to delete.
2. Do one of the following:

- From the **More Actions** menu, click the object's **Notifications** icon.
- Click the object's **Properties** icon. Then click the **Notifications** link.

The object's current notifications display.

3. From the **More Actions** menu that appears to the right of the notification you want to delete, select **Delete This Notification**.

The Confirm Delete page appears.

4. Click **Delete**.

## Customizing notifications

You can customize the content and layout of the email notification message that is sent when a change occurs to an object. You do this by editing the subscription email templates. When you add notifications for site objects, you select the template to use.

To customize a notification email template:

1. Locate the object whose notifications you want to view.
2. Do one of the following:
  - From the **More Actions** menu, click the object's **Notifications** icon.
  - Click the object's **Properties** icon. Then click the **Notifications** link.The object's current notifications display.
3. Click the notification you want to customize.
4. Click Edit Email Template.
5. Set **Enable Email Template** to Yes.
6. Set the **Email Format: HTML** or **Plain Text**.
7. From the **Select an Email Template** combo box, select the template you would like to customize.
8. Customize the file using the information below.
9. Once you are done customizing the template, click **Apply** to save your changes.

## Customizing the subscription.tpl file

The DocuShare-provided subscription.tpl file consists of 11 sections; the section headings are enclosed within square brackets. Each section defines a part of the email message and is used for either plain text-formatted email messages, HTML-formatted email messages, or both.

### subscription.tpl section headings

Template File Section	Definition	Email Format of Section
[subscription.obj.props]	Object properties other than the default set of object properties.	Plain Text & HTML
[subscription.parent.props]	Container properties other than the default set of container properties.	Plain Text & HTML
[subscription.mail.subject]	The subject of a subscription message.	Plain Text & HTML
[subscription.mail.header]	The header of a subscription message.	Plain Text
[subscription.mail.body]	The body of a subscription message.	Plain Text
[subscription.mail.footer]	The footer of a subscription message.	Plain Text
[subscription.misc]	A miscellaneous section of a subscription message that appears after the footer.	Plain Text & HTML
[subscription.mail.header.html]	The header of a subscription message.	HTML
[subscription.mail.body.html]	The body of a subscription message.	HTML
[subscription.mail.footer.html]	The footer of a subscription message.	HTML

The lines following a section heading apply to that section. Each line can contain a comment, preceded with a pound character (#), or hard coded text, named parameters, and HTML tags without leading/trailing whitespace characters.

The format of each named parameter that you can include in the lines is as follows:

### Formats of parameters

Parameter	Format
{<property_name>}	Substitute <property_name> with object's property value.
{parents.<property_name>}	Substitute <property_name> with property value of object's parent container.
{label.<property_name>}	Substitute <property_name> with label of object property.
{label.parent.<property_name>}	Substitute <property_name> with label of parent container's property.
{subscription.<property_name>}	Substitute <property_name> with subscription object's property value.
{event.message.<section_tag>}	Substitute <section_tag> with subscription object's property value.
{emitter.<property_name>}	Substitute <property_name> with emitter's property value.

## Formats of parameters

Parameter	Format
{owner.<property_name>}	Substitute <property_name> with property value of object's owner.
{<site_property_name>}	Substitute <site_property_name> with site property value.

The Subscription Service provides a default set of object and parent container properties. For a property other than one of the default properties listed below, define it in either the **[subscription.obj.props]** or the **[subscription.parent.props]** section.

### Object properties

classname, handle, handle\_url, props\_view\_url, title, description, summary, keywords, create\_date, modified\_date, entry.title

### Parent container properties

parent.handle, parent.handle\_url, parent.title

### Subscription properties

subscription.handle, subscription.handle\_url, subscription.title

### Object owner and emitter properties

owner.handle\_url, owner.username, emitter.username

### Site properties

icon, domain, sitename, server\_url, event\_time

### Object property labels

label.title, label.description, label.summary, label.keywords, label.create\_date, label.modified\_date

### Other property labels

label.parent.title, label.domain, label.emitter.username, label.link\_type

**Event messages** (uses messages from **SubscriptionMessage.properties** based on the event type)

**event.message.subject**—Substitutes with the messages prefixed with **subject.text.<type>**, where **<type>** is the event type.

**event.message.header**—Substitutes with the messages prefixed with **intro.text.<type>**, where **<type>** is the event type.

**event.message.header.html**—Substitutes with the messages prefixed with **intro.text.<type>**, where **<type>** is the event type. <p> tag precedes the message.

**event.message.footer**—Substitutes with the messages prefixed with **footnote.text.<type>**, where **<type>** is the event type.

**event.message.footer.html**—Substitutes with the messages prefixed with **footnote.html.<type>**, where **<type>** is the event type.

**Note:** **{event.message.subject}** can be changed to some hard coded text. However, appending the value to **{event.message.subject}** is not supported. The site administrator must enable **Update Email Template** in the administration page to load keys each time.

The following example shows a section of the template file:

```
[subscri ption. obj . props]
#obj ect propert ies : eq. <property_name>, . . .
i nvoi ce_ amount

[subscri ption. mai l . header]
# Comment 1 for header secti on
Li ne 1 text for header secti on
Li ne 2 text for header secti on

[subscri ption. mai l . body]
# Comment 2 for body

[subscri ption. mai l . body. html ]
#message body secti on i n html form
<br><TABLE CELLPADDI NG=4><TR VALI GN="TOP">
<TD ALI GN="CENTER"><i mg src="{i con} " ><br></TD>
<TD><A HREF="{handl e_ url } ">{ti tl e}</A>
  <font col or=' bl ue' ><br>{l abel . i nvoi ce_ amount}
  {i nvoi ce_ amount}</font>
  <br>{summary}
  <br>{descri ption}
  <br><l >Appears I n: </l > <A
  HREF="{parent. handl e_ url }">{parent. ti tl e}</A>
<br></TD>
<TD><A HREF="{owner. handl e_ url }">{owner. username}</A></TD>
<TD>{create_ date}</TD>
<TD><A HREF="{parent. handl e_ url }">Props</A></TD>
</TR></TABLE><br>

[subscri ption. mai l . footer]
# Comment 3 for footer secti on
Li ne 3 text for footer secti on
Li ne 4 text for footer secti on
```

**Note:** The **[subscription.mail.body]** section does not include any parameters.

## The subscription.tpl file

This section provides a copy of the contents of the template file.

```
#---- extra properties of dsubject or parent container dsubject-----
-----

[subscription.obj.props]
#object properties : e.g. <property_name>, <property_name>, etc.

[subscription.parent.props]
#parent container properties : e.g.
<property_name>, <property_name>, etc.
#---- in plain Text -----

[subscription.mail.subject]
#subject section
{event.message.subject}

[subscription.mail.header]
#header section in plain text form
{event.message.header}

[subscription.mail.body]
#message body section in plain text form
URL: {handle_url}
{label.title} : {title}
{label.summary} : {summary}
{label.description} : {description}
{label.abstract} : {abstract}
{label.summary} : {revision_comments}
{label.handle} : {handle}
{label.create_date} : {create_date}
Owner : {owner.username}

[subscription.mail.footer]
#footer section in plain text form
{event.message.footer}

[subscription.misc]
#appendix after footer section
#---- in HTML -----

[subscription.mail.header.html]
#header section in html form
<p>{event.message.header.html}
```

**[subscri ption. mai l . body. html ]**

```
#message body section in html form
<br><TABLE CELLPADDI NG=4><TR VALI GN="TOP">
<TD ALI GN="CENTER"><i mg src="{i con} "><br></TD>
<TD><A HREF="{handl e_url } ">{ti tl e}</A>
  <br>{summary}
  <br>{descri ption}
  <br><l>Appears In: </l>&nbsp;<A
HREF="{parent. handl e_url }">{parent. ti tl e}</A>
  <br></TD>
<TD><A HREF="{owner. handl e_url }">{owner. username}</A></TD>
<TD>{create_date}</TD>
<TD><A HREF="{parent. handl e_url }">Props</A></TD>
</TR></TABLE><br>
```

**[subscri ption. mai l . footer. html ]**

```
#footer section in html form
#<br><P>{event. message. footer. html }
<br><P>Thi s noti fi cation was generated by &nbsp;<A
HREF="{subscri ption. handl e_url }">{subscri ption. handl e}</A>. <BR>
```

10. Once you are done customizing the template, click **Apply** to save your changes.



# DocuShare workspaces

## About workspaces

A workspace provides a shared area for project and team collaboration. From a single page within DocuShare you and other workspace members can gather and manage shared content, access collaboration tools to facilitate your work, and communicate with each other.

A workspace consists of four distinct areas called portlets; each portlet has a different use.

- **Content portlet**—The area in which you add and manage shared content.
- **Shortcuts portlet**—Displays frequently used objects.
- **Calendar portlet**—Shows a combination of the calendars in the content portlet.
- **Membership portlet**—Lists the users who are members of the workspace membership group.

You can close a portlet and reopen it by clicking the small triangle next to the portlet title.

## Adding a workspace

You can add a workspace to another workspace or you add a workspace to My DocuShare. To guide you in creating a workspace, DocuShare provides templates and a wizard.

When adding a workspace, a **membership group** is created automatically and initially includes you as its member. You can add members to the group after the workspace is added. The members are listed in the membership portlet on the workspace home page.

**Note:** If you are a Site Administrator or a Content Administrator, an **[add]** link appears on the home page. This allows you to add a workspace to your site home page.

To add a workspace:

1. To add a workspace to another workspace, do one of the following and then go to step 3:
  - On the DocuShare home page, click **See More** under Workspaces. Search for the workspace to which you want to add a workspace. Open the workspace and select **Workspace** from the **Add** menu.
  - Go to My DocuShare. In the workspaces portlet, search for the workspace to which you want to add a workspace. Open the workspace and select **Workspace** from the **Add** menu.



- Navigate to and open the workspace to which you want to add a workspace. In the content portlet, select **Workspace** from the **Add** menu.
2. To add a workspace to My DocuShare, do one of the following:
    - On the DocuShare home page, click **See More** under Workspaces. Then click **Add a Workspace**.
    - Go to My DocuShare. In the workspaces portlet, click **Add a Workspace**.
  3. On the Add a New Workspace page, select one of the following templates:
    - **Document Storage**—includes four workspace collections in the content portlet.
    - **Team Project**—includes two workspace collections and a calendar in the content portlet.
  4. Click **Next**.
  5. In the **Title** field, enter a name for the workspace.
  6. Enter any optional information. Click a field name for a description of each property.
  7. Click **Done**.

The workspace home page appears.

## Controlling access to the workspace

To change the users and groups that have access to the workspace, you simply change the members of the workspace membership group. Any user or group that you add to the group is assigned full read and write permissions to the workspace. You can choose to give the group manage permission to the workspace.

In addition to listing the group members, the membership portlet enables you to see which users are logged into DocuShare. The user icon next to the user's name in the portlet indicates whether or not the user is logged in; the icon is grayed when the user is not logged in.

Like other DocuShare objects, a workspace has an access list, which you can use to give users and groups access to the workspace. However, any users and groups that you add to the access list are not listed in the membership portlet.

## Changing the users and groups in the membership group

If you are the workspace owner or a member of the membership group (and the group is assigned manage permission to the workspace), you change the users and groups in the group.

**Note:** The membership portlet lists users only. Therefore, individual group members are listed and not the group titles.

To change the members of the membership group:

1. On the workspace home page, do one of the following:
  - Click the **Membership** heading.
  - Click the **Properties** icon. On the Properties page, click the **Membership** link.

The Membership page appears showing the current members.

2. Click the **Change Membership** link.
3. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
4. 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
5. 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).
6. 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).
7. Click **Update**.

The Members page appears.
8. To give one or more members manage permission to the group, click the checkbox next to each member's name and then click **Apply**. Manage permission allows the member to change the group's properties and membership.
9. To assign manage permission to the membership group, display the Permissions page for the workspace. Click the **Manage** box for the group and click **Apply**.

## Re-assigning the membership group

As needed, you can change the membership group that is associated with the workspace by assigning a different group to the workspace.

To re-assign the membership group:

1. On the workspace home page, click the **Properties** icon.
2. On the Properties page, click the **Permissions** link.
3. Click the **Re-assign Membership Group** button.

The Re-assign Membership Group page appears.
4. Do one of the following:
  - To find a specific group, enter part of the group's title in the **Search** field. Click the **Go** button.
  - To list all groups, click **Show All** (if displayed).
  - To display your favorite groups, click **Show Favorites**.
5. In the **New Membership Group** field, select the group you want to associate with the workspace.
6. Click **Save**.

The previous membership group remains in the workspace's access list.

## Adding content to the workspace

You can add any type of object, including another workspace, to a workspace.

To add content to the workspace:

1. In the content portlet, select the type of object that you want to add from the **Add** menu.
2. On the Add page, enter the required information and click **Apply**.

The object appears in the content portlet.

To use workspace view features:

1. From the **Show** menu, select the type of object you want to display.
2. Click a **View** icon to switch between the icon and list views.

## Managing shortcuts

To conveniently access frequently used objects from a workspace, you can add shortcuts to them. Any object you add as a shortcut is a link to the original object, not a copy. If the original object is deleted, it will no longer appear as a shortcut.

To add a shortcut to a workspace:

1. Locate the object that you want to add as a shortcut.
2. Click the checkbox that appears next to the object's title.
3. From the **Edit Selected** menu, select **Copy Shortcuts**.
4. On the Confirm Copy Shortcuts page, click **Confirm**.
5. Navigate to and open the workspace to which you want to add the shortcut.
6. In the shortcuts portlet, click the **Paste Shortcuts** icon.
7. On the Confirm Paste Shortcut page, click **Confirm**.

The object you added appears in the shortcuts portlets. You can use the **Show** menu to display one type of object, such as documents. The **View** icons let you switch between the icon and list views.

To remove a shortcut from a workspace:

1. Navigate to and open the workspace that contains the shortcut that you want to remove.
2. In the shortcuts portlet, click the **List View** icon to display the shortcuts in a list.
3. Click the **Remove Shortcut** icon that appears next to the object you want to remove.
4. On the Confirm Remove Shortcut page, click **Confirm**.

The object no longer appears in shortcuts. However, the object still appears in its original locations.

## Using calendars

The calendars portlet shows all of the calendars from the content portlet. This allows you and other workspace members to quickly access individual calendars as well as to view the events from all calendars.

To use the calendars portlet:

1. From the **Show** menu, select the calendar that you want to view or select **All Calendars** to view all calendars.
2. Using the **View** icons, you can switch between daily and weekly calendar views.

## Changing portlet properties

Each portlet has default display properties that you can change. For example, you can set the default view to list view to display objects in a collection-style listing.

To change the properties of a portlet:

1. Click the portlet's **Edit** button.
2. Depending on which portlet properties you are changing, do one or all of the following:
  - a. In the **Page Size** field, enter the number of objects to show on each page.
  - b. In the **Sort Order** field, enter the order in which to display objects.
  - c. In the **View Type** field, enter the type of view used to display objects.Click a field name for a description of each property.
3. Click **Apply**.

# Using social computing features

## About social computing features

DocuShare enables you and other users to discuss, share, and collaborate regardless of location using its social computing features:

- **Discussions**—A discussion is an online forum that allows users to interact by posting topics and replies to topics.
- **Weblogs**—A weblog allows a user to create and share a personal website on a particular subject. The weblog includes postings in reverse chronological order and allows others to comment on the postings.
- **Wikis**—A wiki enables a group of users to collaborate on a website by creating, editing, and linking web pages.

## Adding a discussion

To facilitate an online exchange of ideas, DocuShare supports threaded discussions. You can add a container, 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 as well as attach a document to a topic or reply.

You can add a discussion to a collection or workspace.

To add a discussion:

1. Navigate to and open the container to which you want to add a discussion.
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 discussion is added to the container.

## Adding topics, attachments, and replies 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.

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 body of the topic.
5. Click **Submit**.

The topic is added to the discussion.

6. If you want to attach a document to the topic, do the following:

- a. Click the **Attach** button.

The Add Document page appears.

- b. Enter the complete path and filename of the document in the **Filename** field or click the **Browse** button to navigate to and select the document.
- c. In the **Title** field, enter a document name.
- d. Click **Apply**.

The document appears on the topic.

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**.
7. If you want to attach a document to the reply, do the following:
  - a. Click the **Attach** button.

The Add Document page appears.

- b. Enter the complete path and filename of the document in the **Filename** field or click the **Browse** button to navigate to and select the document.
- c. In the **Title** field, enter a document name.
- d. Click **Apply**.

The document appears on the reply.

## 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 view and delete expired topics:

1. Locate 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 View Properties page appears.

3. Click the **View Expired** link.

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**.

## Adding a weblog

A weblog is a simple web site on which you post entries about a specific topic on a regular basis. Entries are displayed in reverse chronological order and include the name of the user who posted the entry.

When adding a weblog, you can choose to have it moderated. A moderated weblog requires a user with manage permission to the weblog to approve its entries before they are posted for all users to read.

You can add a weblog to a collection or workspace. By default, when you add a weblog, you are the only user who can post entries to it (**Initial Permissions** is set to **Same as container except write restricted to owner**). If you want other users and groups to add entries to the weblog, either change the **Initial Permissions** setting when adding the object or change the object's permissions after adding it.

To add a weblog:

1. Navigate to and open the container to which you want to add a weblog.
2. From the **Add** menu, select **Weblog**.

The Add Weblog page appears.

3. In the **Title** field, enter a name for the weblog. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Change any of the default property values and 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 weblog is added to the container.

**Note:** When you create a weblog using a custom theme, that theme is used to display weblog pages. Any theme you select on your User Properties page has no effect on the weblog pages. When you create a weblog using a default or clean theme, the theme you select on your User Properties page is used to display weblog pages.

## Posting weblog entries

To add content to a weblog, you post entries to it. By default, entries appear in reverse-chronological order.

To post an entry:

1. Locate and open the weblog to which you want to post an entry.
2. Click the **Add Entry** link.

The Add Weblog Entry page appears.

3. In the **Title** field, enter a name for the entry. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. In the **Description** field, enter the body of the entry.
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 entry appears in the weblog and includes the date the entry was posted and your username. If the weblog is moderated, **Approval Pending** precedes your username. Users cannot read the entry until a user with manage permission to the weblog approves it.

## Editing weblog entries

To edit an entry:

1. Locate and open the weblog that contains the entry you want to edit.
2. Click the **Edit** icon next to the entry.
3. Make the changes you want.
4. Click **Apply**.



## Deleting weblog entries

To delete a weblog entry:

1. Locate and open the weblog that contains the entry you want to delete.
2. Click the weblog entry title.
3. From the weblog entry's **More actions** menu, select **Delete**.  
The Confirm Delete page appears.
4. Click **Delete** to remove the object from your site.

## Approving weblog entries

If you are a user with manage permission to a weblog that is moderated, you must approve an entry before it is posted for all users to read.

To approve an entry:

1. Do one of the following:
  - Locate and open the weblog that contains the entry you need to approve. Click the check mark next to the entry.
  - On the navigation bar, click **My Tasks**. From the **Show** menu, select **Tasks Assigned to Me**. Click the weblog entry title.
  - On the navigation bar, click **My DocuShare**. The tasks assigned to you display under **Tasks**. Click the weblog entry title.A For Your Approval window appears.
2. Click the title of the entry to review the text.
3. Click the **Approved** button.

## Adding comments to entries

To provide feedback or commentary on a weblog entry, you can add a comment to it.

To add a comment:

1. Locate and open the weblog entry to which you want to add a comment.
2. Click the **Add a Comment** link.
3. In the **Title** field, enter a comment title.
4. In the **Description** field, enter the comment text.
5. Click **Apply**.

## Viewing comments

To view comments:

1. Locate and open the weblog.

The weblog entries display. A **Comments** link appears for an entry that includes comments.

2. Click a **Comments** link.

The comments display in reverse chronological order and include the name of the user who posted the comment.

## Deleting comments

If you are the user who added the comment or the user who added the entry, you can delete the comment.

To delete a comment:

1. Locate and open the weblog entry that includes the comment you want to delete.
2. Click the comment title.
3. From the **More Actions menu**, select **Delete**.

The Confirm Delete page appears.

4. Click **Delete** to remove the comment.

## Adding a wiki

A wiki allows you and other users to quickly and easily publish content on the web. Using a web browser and either the built-in WYSIWYG (What You See Is What You Get) editor or simple wiki syntax, you can add and link web pages and edit content instantly. Wikis are well-suited for any type of project that requires collaborative writing.

By default, you use the WYSIWYG editor to create wiki content. Your user account property **Text Composition Format** specifies whether or not to use the WYSIWYG editor (**Rich Text**) or wiki syntax (**Plain Text**). Should you want to use wiki syntax, change the **Text Composition Format** property or, after adding the wiki, deselect the **wysiwyg** checkbox on the Add WikiPage. Once you have selected the editing method, you should continue to use it after adding the page.

To get started, you first add a wiki to a collection or workspace and then add content to it.

To add a wiki:

1. Navigate to and open the container to which you want to add a wiki.
2. From the **Add** menu, select **Wiki**.  
The Add Wiki page appears.
3. In the **Title** field, enter a name for the wiki. The name can contain spaces and punctuation marks.
4. Enter any optional information. Click a field name for a description of each property. To add interwiki links, see [Using interwiki links](#) on page 78.

**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 wiki is added to the container.

**Note:** When you create a wiki using a custom theme, that theme is used to display wiki pages. Any theme you select on your User Properties page has no effect on the wiki pages. When you create a wiki using a default or clean theme, the theme you select on your User Properties page is used to display wiki pages.

## Adding content to a wiki

You add content to the wiki by editing the wiki home page, creating and linking additional wiki pages, inserting images, and attaching documents.

By default, each wiki page includes a WYSIWYG editor for easy formatting of content. Alternatively, you can use the wiki syntax provided in a sidebar on a wiki page. However, when editing a wiki page, you should use the same method you used to create the page.

### Adding content to the wiki home page

After adding the wiki, your first step is to add content to the home page.

To add content to the home page:

1. Locate and open the wiki to which you want to add content.  
The Add WikiPage appears and the page is titled HomePage.
2. In the **Description** field, enter the page content using one of the following methods:
  - Use the WYSIWYG editor. The editor appears when your user account property **Text Composition Format** is set to **Rich Text** and the **wysiwyg** checkbox is selected on the Add WikiPage.
  - Deselect the **wysiwyg** checkbox. Use the wiki syntax displayed in the sidebar.

**Note:** When using wiki syntax, HTML tags are used on the page. When you want to include angle brackets on the page, either use the WYSIWYG editor or type `&lt;text>` to have the angle brackets and text appear. Similarly, to have the ampersand character (&) appear, type `&amp;`.

3. Click **Apply**.  
The wiki home page appears with your content.

### Linking pages to a wiki

You can add any number of web pages to the wiki. You first add the link to the page and then enter content on the page.

To link a page to the wiki:

1. Open a wiki page and click **Edit This Page**.
2. On the Edit Wiki page, enter the new page name between double square brackets.  
**Example:** `[[New Wiki Page]]`
3. Click **Apply**.

The page appears showing the page name you entered followed by a question mark.

4. Click the page name.

The Add WikiPage appears.

5. In the **Description** field, enter the page content using either the WYSIWYG editor or wiki syntax.
6. Click **Apply**.

The pages are linked.

**Note:** To list the pages linked to a wiki page, view the wiki page and click **Backlinks**. The linked pages are listed on the **Search Results** page.

## Inserting images

On a wiki page you can insert an image that is located on an external URL or on the same DocuShare server.

To insert an image on a wiki page using the WYSIWYG editor:

1. Do one of the following:
  - To insert an image located on an external URL, select the text to link to the image and click the **Insert/Edit Link** button on the WYSIWYG bar. Enter the complete URL to the image and click **Insert**.
  - To insert an image located on the same DocuShare server, enter {image:Document-#}. The pound symbol (#) represents a number.
2. Click **Apply**.

To insert an image on a wiki page using wiki syntax:

1. Do one of the following:
  - To insert an image located on an external URL, enter {image:url}.
  - To insert an image located on the same DocuShare server, enter {image:Document-#}. The pound symbol (#) represents a number.
2. Click **Apply**.

## Attaching documents

On a wiki page you can add a link to a document that you upload to DocuShare.

To attach a document to a wiki page:

1. Open a wiki page and click **Attach**.

The Add Document page appears.
2. Enter the complete path and filename of the document in the **Filename** field or click the **Browse** button to navigate to and select the document.
3. In the **Title** field, enter a document name.
4. Click **Apply**.

5. On the wiki page, click **Edit This Page**.
6. On the Edit Wiki page, enter the document name that you used in step 3 between double square brackets.  
**Example:** For more information, see our `[[brochure]]`.
7. Click **Apply**.

## Using interwiki links

The use of interwiki links allows you to create links to external wiki sites on your wiki pages without typing or pasting URLs. Before adding the links to your wiki pages, you must map each wiki name to its URL.

To use interwiki links:

1. Locate the wiki and click its **Properties** icon.
2. Click the **Edit** link.
3. Under **Inter Wiki Links**, enter the following:
  - **Inter Wiki Name**—The name to enter when creating the link on the wiki page.  
Example: wikipedia.
  - **Inter Wiki Link Prefix**—The URL of the wiki. Example: `http://en.wikipedia.org/wiki/`.
4. To add another interwiki link, click the **plus sign (+)**.
5. If you need to remove an interwiki link, click the **trashcan** located to the right of the link.
6. To create a link on a wiki page, edit the page by entering `[[page title@wiki name]]`. Example: `[[Italy@wikipedia]]`.

## Renaming wiki pages

To rename a wiki page:

1. Locate and open the wiki page that you want to rename.
2. Click **Rename This Page**.
3. In the **Title** field, enter a new name; then click **Rename**.
4. On the confirmation page, click **OK**.

**Note:** You cannot rename the wiki home page.

## Printing wiki pages

You can print some or all of your wiki pages to review the content on the pages or to have a printed copy of the wiki.

To print wiki pages:

1. Locate and open the homepage of the wiki that you want to print.
2. Click **Printable View**.

The view shows the top two levels of the wiki, with the homepage as the top level, or level one.

3. To view other wiki pages, do any of the following:
  - To remove one level of pages from the view, click **Subtract One Level**.
  - To add one level of pages to the view, click **Add One Level**.
  - To display all levels of pages, click **Show All Levels**. When viewing all levels, you can click **Show Two Levels** to view the top two levels of the wiki.
4. Use the **Print** command from the **File** menu to print the wiki view.

# Automating work processes

## 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.

### Creating a routing task

You can route an existing document on your site or you can choose to route a document when adding it to DocuShare. 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.

To route a document:

1. Do one of the following:
  - **To route a single document**, locate the document that you want to route and select **Route** from the **More Actions** menu. The **Route** command does not appear if the document is locked.
  - **To route a single document version**, go to the document's Version History page, locate the document version that you want to route and click its **Route** icon. The **Route** icon does not appear if the document is locked.
  - **To route several documents**, locate the documents and click the checkbox next to each document. From the **Edit Selected** menu, select **Route**. On the Confirmation page, click **Confirm**.

- **To route a document after adding it to DocuShare**, select **Document** from the **Add** menu. Enter the required information and click **Publish and then route the document** before clicking **Apply**.
- **To route a document before it appears in DocuShare**, select **Document** from the **Add** menu. Enter the required information and click **Route the document and publish it later** before clicking **Apply**.

A Routing Slip appears.

2. If you want to include another document, click the **Add** button. Locate the document and click its **Route** command; then confirm adding the document to the Routing Slip.
3. If you want to use a saved Routing Slip, do one of the following and then go to step 19:
  - Select one of your saved Routing Slips and click **Load**.
  - Click **View all Saved Routing Slips** to display your saved Routing Slips and the public Routing Slips saved by all site users. Select a Routing Slip.
4. Under **Routing Action**, choose one of the following:
  - **Approve or Disapprove**—Requires users to approve or not approve the document. Click **Allow recipients to make changes** if you want to let a recipient upload a new document to replace the original one. Click **Make version approved by all the preferred version** if you want the version all recipients approved to be the new preferred version.
  - **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. Click **Return to initiator after review** if you want to publish a revised document as the preferred version when the review is complete.
  - **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.
5. 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. However, if one user does not approve the document, it is not routed to other users.
  - **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.
6. Under **Routing 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.
7. Click **Next** to go to the Add Recipients page.



8. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
9. 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 list all accounts, click **Show All** (if displayed).
  - To display your favorite accounts, click **Show Favorites**.
10. 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).
11. In the **Selected Users/Groups** field, select any accounts that you want to remove from the list of recipients and click the **Remove** button.
12. 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.
13. 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**.
14. Click **Next** to go to the Choose Escalation and Notification page (the page does not appear if you are routing the document for information).
15. Select **If Not Complete** and do the following:
  - To specify a completion date, select **By** and enter a date or select **Within** and specify a time period.
  - To specify an escalation action if the routing task is not complete by the specified date, choose an action from the **Then Escalate** menu.
16. 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**.
17. Click **Done** and review the routing information for the task on the Routing Step Review page.
18. To 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**.
19. 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:** If you chose **Route the document and publish it later in step 1**, you must publish the document for it appear in DocuShare. For information on how to publish the document, see [Checking the status of routing tasks you assigned on page 83](#).

## Setting up a collection for routing documents

You can have any document added to a collection automatically routed by associating one of your saved, private Routing Slips with the collection.

To use a Routing Slip with a collection:

1. Locate the collection you want to use for routing documents.
2. Click the **Properties** icon that appears to the right of the collection's title.
3. Click the **Edit** link.
4. In the **Route Before Publishing** field, select **Yes** to route the document before it is added to the collection.
5. In the **Use Routing Slip** field, select the Routing Slip that you want to use.
6. Click **Apply**.

## 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 DocuShare.

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**. Then 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. The Task status table below describes the status information.

### Task status

Status	Description
Approved	The single-step task or one step of a multi-step task is complete and the recipients approved the documents.
Disapproved	The single-step task or one step of a multi-step task is complete and the recipients did not approve the documents.
Reviewed	The single-step task or one step of a multi-step task is complete and the recipients reviewed the documents.

## Task status

Status	Description
Acknowledged	The single-step task or one step of a multi-step task is complete and the recipients acknowledged receiving the documents.
Delivered	The single-step task or one step of a multi-step task is complete and the recipients received the documents 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 acknowledgment.
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.
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 <b>Cancel Task</b> is set for <b>Then Escalate</b> 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.
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 DocuShare (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 View 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**. Then 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. The Report type table below describes the report types.

### 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 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 85.
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 View 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 48.

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.

## Changing the preferred document version when the review is complete

If you routed a document for review and selected **Return to initiator after review**, you can change the preferred version to a document that a recipient uploaded or to a new document that you upload.

To change the preferred document version:

1. In the My Tasks window, select **Tasks Assigned to Me**.
2. Under **Description**, click the task name.
3. 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.

4. Review the document.

5. To upload a new document, do the following:
  - a. Click the **Add Draft Version** icon that appears to the right of the title of the document you routed.
  - b. On the Add Version page, click the **Choose File** button.
  - c. Navigate to and select the document you want, and then click **Open**.
  - d. Optionally, change the document title and add a version comment.
  - e. On the Add Version page, click **Apply**.
  - f. On the View Properties page, click the **For Your Review** link in the **Location** path.
6. Under **Next Version**, click the radio button next to the document you want to set as the preferred version.
7. Click the **Make This the Preferred Version** checkbox.
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.

## 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**. 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, do one of the following:
  - Click the document's title to view it. The document opens in its native editor or a window appears allowing you to download the document. When your review is complete, close the document.

- Click the **Check Out and Download** icon to edit the document. Download the document, make the changes you want, and then upload a new version. Unlock the document by clicking the **Unlock** icon.
- Click the **Add Version** icon to add a new version of the document. In the Add Version window, choose the document you want to add and click **Apply**.

**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. You can repeat step 1 for each routed document.
3. In the **Comments** field, enter an optional message.
4. Click **Save as private** if you do not want other recipients to view your comments.
5. 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 View 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. On the View 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 Acknowledgment 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. This provides you with a record of the completed routing tasks you assigned.



In addition, you can view the deleted routing tasks of a specific document. See [Viewing the routing tasks of a document](#) on page 90.

To view all of your deleted tasks:

1. Do one of the following:
  - On the navigation bar, click **My Tasks**.
  - On the navigation bar, click **My DocuShare**. Then click **Tasks**.
2. In the My Tasks window, select **Deleted Tasks**.  
Your deleted routing tasks display.

## Viewing the 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 Routing page for the document. The page displays both tasks in progress and deleted tasks.

To view a document's routing tasks:

1. Do one of the following:
  - Locate 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 View Properties page appears.
3. Click the **Routing** link.  
The tasks and their status display.

## Using content rules

A content rule allows you to have an action run automatically when a specific event occurs. For example, you can create a content rule for a collection to route any document added to the collection. Or, you can create a content rule for a document to have an email message sent when a new version of the document authored by a specific user is added. You can add a content rule for any object on your site.

You can have an action run when any of the events described in the Events table below occur.

### Events

Event Name	When Event Occurs
<b>Any change</b>	Any one of the changes listed in this table.
<b>Document locked or checked out</b>	The document is locked or checked out for editing.
<b>Document unlocked</b>	The document is unlocked.
<b>Lifecycle management</b>	A policy event occurs. For more information on creating content rules for lifecycle management events, see the <i>Xerox DocuShare Lifecycle Manager Guide</i> .
<b>Location edited</b>	The location of an object is changed, using either the Locations page or copy/cut and paste.
<b>New document version added</b>	A document is updated with a newer version.
<b>Owner changed</b>	The owner of an object is changed.  <b>Note:</b> When changing the owner of a document, you can optionally change the owner of the document versions; when changing the owner of a container, you can choose how to change the owner of the container and its contents. Therefore, the owner change can be the result of how the change is applied.
<b>Permissions changed</b>	The permissions of an object are changed.  <b>Note:</b> When changing the permissions of a document, you can optionally change the permissions of the document versions; when changing the permissions of a container, you can choose how to change the permissions of the container and its contents. Therefore, the permissions change can be the result of how the change is applied.
<b>Properties edited</b>	The properties of an object are changed.
<b>Routing</b>	A change occurred to the status of a routing task.
<b>Something added</b>	A new object is added to a container, using either the Add menu or copy/cut and paste.

## Creating a content rule

DocuShare provides a wizard to guide you in creating a content rule. Using the wizard, you provide a brief description of the content rule, select the event that triggers the action, select the action to run, and enter settings specific to the selected action.

To create a content rule:

1. Locate the object for which you want to create a content rule.
  2. Do one of the following:
    - Click the object's **Content Rules** icon.
    - Click the object's **Properties** icon. Then click the **Content Rules** link.
  3. On the Content Rules page, click **Create a New Content Rule**.

The Create a New Content Rule wizard appears. The following steps describe the required fields. For information about any of the optional fields in the wizard, click the appropriate field name.
  4. On the Description page, enter a **Title** for the content rule and click **Next**.
  5. On the Event Triggers page, select the event that will cause the action to run.
  6. If the object is a container (collection, calendar, etc.), select one of the following choices from the **Event Applies To** menu. Then click **Next**.
    - **This container and immediate contents**—Triggers the action when the event occurs to the container and only its first nested level of objects.

For example, if a collection contains several objects and a subcollection, the action is triggered when the event occurs to any of the objects and the subcollection; the action is not triggered when the event occurs to an object in the subcollection.
    - **This container and all levels of contents**—Triggers the action when the event occurs to the container and all of the objects under it.

For example, when the event occurs to any object in a collection regardless of its nested level, the action is triggered.
- Note:** Your administrator sets the maximum number of objects DocuShare examines to determine if the event occurred. The default is 30,000 objects.
7. On the Content Property Conditions page, refine the event trigger by specifying property conditions. Then click **Next**.
  8. On the Action Performed page, select the action to run when the event occurs and click **Next**.

The Action Settings page appears. The options on the page vary depending on the action you selected in the previous step. Click an option name for a description of its usage.
  9. Enter the appropriate information and click **Next**.
  10. On the Completion Settings page, you can choose to set a property value on the object when the content rule completes. In addition, you can append the property value to any existing property values. Then click **Done**.

The View Properties page for the content rule appears and provides a summary of the content rule.

## Changing content rules

At any time after creating a content rule, you can change its settings.

To change a content rule:

1. Locate the object whose content rule you want to change.
2. Do one of the following:
  - From the object's **More Actions** menu, select **Content Rules**.
  - Click the object's **Content Rules** icon.

The Content Rules page lists the object's current content rules.
3. Do one of the following:
  - Click the **Properties** icon that appears to the right of the content rule.
  - Click the title of the content rule.

The View Properties page provides a summary of the content rule.
4. Click the **Edit** link.
5. On each Edit Content Rule page, make the changes you want and click **Next**.
6. On the last page, click **Done**.

## Deleting a content rule

Depending on how your site is set up, a deleted content rule can go to either your personal trashcan on My DocuShare or the site-wide trashcan. Contact your administrator to find out which trashcans are used on your site. If you have a personal trashcan, you can restore an object from it as long as your administrator has not expunged the object from the site-wide trashcan. See [Using your personal home page](#) on page 101 for more information.

To delete a content rule:

1. Locate the object whose content rule you want to delete.
2. Do one of the following:
  - From the object's **More Actions** menu, select **Content Rules**.
  - Click the object's **Content Rules** icon.

The Content Rules page lists the object's current content rules.
3. Click the **Delete** icon for the content rule that you want to delete.

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

## Managing site content rules

From a single location, the Content Rules Management page, you can view, edit, delete and copy site content rules.

To access, edit and delete content rules on your site:

1. On the DocuShare home page, click **Content Rules Management** under **Other Links**.

All the content rules on your site display.

2. To view the settings of a specific content rule, do one of the following:
  - Click the title of the content rule.
  - Select **Properties** from the content rule's **More Actions** menu.
3. To change the settings of a specific content rule, do the following:
  - a. Click the title of the content rule.
  - b. Click the **Edit** link and then make the changes you want.
4. To delete a specific content rule, select **Delete This Content Rule** from the content rule's **More Actions** menu.

## Copying content rules

You can easily copy a content rule to another object of the same type. For example, you can copy a content rule that a user created for a collection to use for one of your collections. This eliminates the need to manually replicate a content rule.

To copy a content rule:

1. On the Content Rules Management page, click the **Duplicate Content Rule** icon for the content rule that you want to copy.
2. In the **Sort By** field, select **Title** to display the possible objects in alphabetical order or select **Handle** to display the possible objects in numerical order.
3. Do one of the following:
  - To find specific objects, enter any part of an object title in the **Search** field. Click the **Go** button.
  - To list all objects, click **Show All** (if displayed).
4. In the **Possible Objects** field, select the objects that you want to copy the content rule to and click the **Add** button. To select multiple objects, use the Ctrl key (Windows) or the Command key (Macintosh).
5. In the **Selected Objects** field, select any objects that you do not want to copy the content rule to and click the **Remove** button. To select multiple objects, use the Ctrl key (Windows) or the Command key (Macintosh).
6. Click **Duplicate Content Rule**.

The copied content rules displays on the Content Rules Management page.

# Running searches

## About 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 choose the scope of a search.

When an object is added to a container, DocuShare stores the object's properties (also called metadata) in a database. If your administrator has enabled content indexing, the content of document will also be stored. When content indexing has been enabled, you can also search on the content of the documents.

DocuShare provides another type of search called quick search. If your site is set up to use this search, refer to the *DocuShare Quick Search Supplement* on the Help Desk.

## 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. On the navigation bar, click **Recent**.  
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 Search** link.  
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 97.

**Note:** If you are a guest and you click **Recent** 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 **Recent** on the navigation bar, DocuShare lists the content that has been added or changed since you last clicked **Recent**.

# Searching for objects

The navigation bar provides a search area that lets you quickly search for objects and content. You do not need to be logged into DocuShare to run a search.

To run a simple search:

1. On the navigation bar, enter a word or phrase in the **Search** field. If you want to find objects that include any one of several words, separate each word with a comma. You can exclude common words such as from, it, and where.

DocuShare searches are not case-sensitive. If you want to search for a word with exact capitalization, precede the word with a tilde character. For example, to search for HTML, enter ~HTML.

**Note:** You can combine search words using the logical operators **AND**, **NOT**, and **OR**. Type the operator in uppercase letters and type a space before and after the operator (for example, fruits **AND** vegetables; fruits **AND** vegetables **NOT** produce).

2. If you are running the search from a page other than the site home page, select a search scope from the **In** menu.
3. Click **Search**.

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** link to control this display. You can also review the search criteria by clicking **Query Details**.

If you searched all federated sites, DocuShare displays the search results from the site on which you ran the search. To display the results from the other sites in the federation, click each site name under **Select a Federation Site**.

## Search options

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

To run a simple search using extended search options:

1. Enter the search words in the **Search** field.
2. Click the small **Gear** icon next to the **Search** field to open the Extended Search section. Specify any of the following information:
  - Search Text Contained In**—Specifies the location of the search words. **Any Part** 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**, **Documents & Collections** 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, specifying ranges, and searching for specific objects and documents.

To run an advanced search:

1. On the navigation bar, click the **Advanced** link.
2. In **Search Text Contained In**, enter the search term. Create a search term by selecting an operator, entering the search word or words (separate each word with a space) or the search character or characters, and then selecting where the search words or characters should occur.

If you want to search for a word with exact capitalization, precede the word with a tilde character. You can click **+ add search term** to create another search term using a logical operator. See the table [Logical operators](#) on page 98 for a description of each logical operator.

**Note:** For information on how to use wildcard and non alphanumeric characters in a search term, see [Using reserved characters in a search](#) on page 99.

3. If you are running the search from a page other than the site home page, select a search scope from the **Search Within** menu.

**Note:** To search for notifications and content rules, the search scope must be set to **The entire site**.

4. 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.
5. In the **Sort Results** field, select the order in which to display the search results.
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 Using Relative Date**, create a search relative to today's date by doing one of the following:
  - To create a relative search without a start or end date, select a date property, select an operator, enter the number of days, and then select **Days Ago** or **Days from Now**. You can click **+ add range** and create another search term.
  - To create a search with start and end dates, select a date property, select an operator, enter the number of days, and then select **Days Ago** or **Days from Now**. Then click **+ add range** and create another search term and enter **0** in the days field.

**Note:** When you save a search query that uses a relative date and then run the search at a later time, the query uses the date on which the search is run.



8. 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.

9. Under **Find Results Using Menu Values**, select the menu and value to use when searching for objects.

You can click **+ add search term** to create a second search term.

10. 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.

11. If you are searching for documents, 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.

12. 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** link to control this display.

If you searched all federated sites, DocuShare displays the search results from the site on which you ran the search. To display the results from the other sites in the federation, click each site name under **Select a Federation Site**.

### Logical operators

Logical operator	Meaning
And	<p><b>Searches for objects that contain all of the search terms.</b></p> <p>For example: Search for objects where "Title contains Training <b>And</b> Summary contains Basic Product."</p> <p>The search would return only objects that have the word "Training" in the Title, and the phrase "Basic Product" in the Summary.</p>

## Logical operators

Logical operator	Meaning
Or	<p><b>Searches for objects that contain one of the search terms.</b></p> <p>For example: Search for objects where “Title contains Advanced <b>Or</b> Summary contains Administrator.”</p> <p>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.</p>
And Not	<p><b>Searches for objects that contain one search term and not the other.</b></p> <p>For example: Search objects where “Title contains Technology <b>And Not</b> Title contains Marketing.”</p> <p>The search would return only those objects where Technology was in the Title, but not return objects if Marketing was also in the Title.</p>

## Using reserved characters in a search

You can use these wildcard characters when building a search:

**Question mark (?)**—Specifies any single alphanumeric character.

For example: **?an** returns ban, can, dan, fan, etc.

**Asterisk (\*)**—Specifies any number of alphanumeric characters in one word.

For example: **corp\*** returns corporal, corporate, corporation, corpulent, etc.

To find objects that include a wildcard character, tilde (~), or double quotation mark (“), use the equals operator, precede the character with one backslash (\), and select the specific property name.

**Example:** To search for a document named “**ReadFirst**” enter:

**equals \“ReadFirst In Title.**

To find objects that include other non alphanumeric characters, such as a parenthesis or an equal sign (=), use the equals operator and select the specific property name.

**Example:** To search for (650) 123-4567, enter:

**equals (650) 123-4567 In (User) Phone**

**Note:** The ampersand (&), at sign (@), and dash (-) 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

After running an advanced search, you can save the search query so you can run the same search again at a later time or share it with other users. 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 **SavedQuery**.  
The Add SavedQuery 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 Locations page appears.
6. Do one of the following:
  - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
  - To display all containers, click **Show All** (if displayed).
  - To display your favorite containers, click **Show Favorites**.
7. In the **Possible Locations** field, select the containers in which you want the saved query to appear and click the **Add** button. To select multiple containers, use the Ctrl key (Windows) or the Command key (Macintosh).
8. In the **Selected Locations** field, select any containers in which you do not want the saved query to appear and click the **Remove** button. To select multiple containers, use the Ctrl key (Windows) or the Command key (Macintosh).
9. Click **Update Locations**.  
DocuShare adds your search query to the container. When you click the saved query, DocuShare runs the search using the saved search terms and displays the results.

# Using your personal home page

## About My DocuShare

My DocuShare provides a single location from which you can conveniently manage personal content as well as access the content on your site. A link to My DocuShare appears on the site home page and on the navigation bar, as a tab and as the house icon next to your username.

My DocuShare consists of areas called portlets; each portlet has a different use. You can open and close a portlet by clicking the small triangle next to the portlet title.

- **Personal Collection**—A collection for private content.
- **Workspaces**—The workspaces you have access to and own.
- **Site Home**—The top level collections on your site.
- **Favorite Calendars Combined**—A combination of the calendars in your Favorites.
- **Personal Trashcan**—Your deleted objects.
- **Favorites**—Links to your frequently used objects.
- **My Groups**—The groups of which you are a member.
- **Tasks**—The routing tasks assigned to you.

On a site with spaces, you also have a My DocuShare page for each space you are a member of. The portlets that are specific to the space are preceded by the word **Space**; for example, Space Favorites. Moving your mouse over the word Space displays the space name. Two portlets are site-wide: My Groups and Tasks.

## 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. Locate the object that you want to add to favorites.
2. Click the checkbox that appears next to the object's title.
3. From the **Edit Selected** menu, select **Add to Favorites**.
4. On the Confirm Add to Favorites page, click **Confirm**.

5. Go to **My DocuShare**.

The object you added appears under **Favorites**. The **Show** 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.

**Note:** Another way to add an object to your favorites is by clicking the object's **Add to Favorites icon**. The icon is the outline of a star. Once you have made an object a favorite, the star will turn yellow.

To remove an object from your favorites:

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

**Note:** You can remove an object from your favorites by clicking the object's **Add to Favorites icon**. The icon will turn from yellow star to the outline of a star.

Once you have removed the object from your favorites, the object will still appear in its original locations.

## 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.

**Note:** Your administrator can choose to set up your site to not use personal collections.

To add an object to your personal collection:

1. Go to **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. Go to **My DocuShare**.

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

There are other ways to add objects to your personal collection: see [Changing the location of objects](#) on page 39 and [Adding documents using drag and drop](#) on page 44.

### Viewing your personal collection

To view your personal collection in full page:

1. Go to **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:** You can delete your personal collection and, optionally, its contents. However, the next time you access My DocuShare your personal collection appears.

## Using your favorite calendars

All of your favorite calendars are combined and displayed in one calendar under the **Favorite Calendars** heading. 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 add favorite calendars:

1. Locate the calendar that you want to add to favorites.
2. Do one of the following:
  - Click the calendar's **Add to Favorites** icon.
  - 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**.
3. Repeat steps 1 and 2 to add additional calendars to favorites.
4. Go to **My DocuShare**.

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

## Using your personal trashcan

Your personal trashcan holds both the objects you delete as well as the objects you own that other users delete. You can use your personal trashcan to restore and expunge deleted objects, provided your administrator has not expunged the objects from the site-wide trashcan.

**Note:** Your administrator can choose to set up your site to not use personal trashcans.

To restore or expunge a deleted object:

1. Go to **My DocuShare**.
2. Under **Personal Trashcan**, select the object that you want to restore or expunge.
3. From the **Action** menu, do one of the following:
  - Select **Restore** to restore the object to the location from which it was deleted.

- Select **Expunge** to remove the object from your site.

**Note:** If the location is a collection or workspace and it was deleted, then the object is restored to your personal collection. If the location is a non-collection type of container (such as a calendar or a discussion) and it was deleted, then the object becomes an orphaned object; your administrator can relocate an orphaned object.

## Viewing your groups

All of the groups of which you are a member display under the **My Groups** heading. You can click a group name to display its Properties page.

## 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 [Automating work processes](#) on page 80.

# 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 site to a secondary server. When you need to retrieve your archived content, you can search for the object and, if needed, restore it.

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

## Archiving content

You can archive documents and email 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 and email 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.

### 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 or email message) that you want to archive.
2. Click the object's **Properties** icon.
3. Click the **Edit** link.
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 (but do not open) 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 manage permission to the object and cannot archive it.
4. Click the **Confirm** button to move the objects to the Archive Server.

## 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.

To restore an archived object:

1. On the navigation bar, click the **Advanced** link.  
The Advanced Search page displays.
2. Specify the search terms and options you want.
3. Depending on the page from which you are running the search, select a search scope from the **Search Within** menu.  
**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.
4. In the **Server to Search** field, select **Archive Server**.
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.



# Task Permissions

**Permissions required for tasks** lists the permissions required for user tasks. The permission required for each task is generally the “highest” needed. It assumes lower permissions are assigned as needed.

## Permissions required for tasks

User Task	Read Properties	Read Content	Read History	Write Properties	Write Content	Manage
<b>All Objects</b>						
Add object					•	
View object content		•				
View object properties	•					
Change object properties				•		
View object change history			•			
View object permissions	•					
Change object permissions						•
Change object owner						•
Change object location						
object	•					
current location (for copy)		•				
current location (for move)					•	
new location					•	
Delete object						•
<b>Document</b>						
View document and versions		•				
Add new document version					•	
Edit document					•	

**Permissions required for tasks**

User Task	Read Properties	Read Content	Read History	Write Properties	Write Content	Manage
Lock document				•		
Unlock document*						
Export a document	•	•				
Route a document	•	•				
Approve or Disapprove Review and Make Changes					•	
Acknowledge Receipt Information		•				
Archive document, email message	•					•
Restore archived document, email message						•
<b>Comment</b>						
Add comment to document, weblog entry	•					
View comment on document, weblog entry	•					
<b>Content Rule</b>						
Create content rule						•
View content rule	•					
Change content rule						•
Copy content rule						•
<b>Notification</b>						
Add notification to object	•					
View object notifications	•					
Create recipient list for notification	•					
<b>Scan Cover Sheet</b>						
Create and use scan cover sheet for object				•	•	

**Permissions required for tasks**

User Task	Read Properties	Read Content	Read History	Write Properties	Write Content	Manage
<b>Weblog</b>						
Add weblog entry text					•	
Edit weblog entry text				•		
Approve weblog entry						•
<b>Wiki</b>						
Add wiki page					•	
Edit wiki page text				•		
Rename wiki page				•		
Delete wiki page						•
<b>Workspace</b>						
Re-assign membership group						•

\* Not controlled by permissions; user who locked the document and content administrators can unlock the document.



# WebDAV folders

## Using WebDAV folders

DocuShare supports the WebDAV (Web-based 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. Depending on your operating system, do one of the following:

- If you are a Windows XP user, simply go to **My Network Places** to add a DocuShare server as a network place.
- If you are a Macintosh OS X user, 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.



# DocuShare portal integration

## Accessing DocuShare in a portlet

If you use a desktop portal application, you can access DocuShare in a portlet. Before you can use this feature, your DocuShare administrator and a portal administrator must set up your site to support the feature.

To access DocuShare in a portlet:

1. Set up your browser to accept cookies from your DocuShare server. Refer to your browser documentation for details.
2. Launch your desktop portal application.  
DocuShare appears in a portlet.
3. To change the view in the portlet, click the **Edit** button located in the upper-right corner of the portlet.
4. From the **Show** menu, select the collection or workspace that you want to view.
5. In the **Portlet Height (px)** field, enter a number to change the height of the portlet. The height is measured in pixels.
6. Click **Submit**.

The collection or workspace appears in the portlet. You can navigate the container to view the content to which you have access.

# Index

## A

abstract (document), showing and hiding in search results, 98

access list, 32

    changing, 36

    viewing, 36

access permissions, See permissions

accounts, See group account, user account

activity history, viewing, 18

Add to Favorites (Edit Selected menu), 40

adding comments to a document, 50

adding objects

    calendars, 32

    collections, 32

    content rules, 91

    discussions, 70

    documents, 43

    events to calendars, 33

    group accounts, 21

    notifications, 56

    topics to discussions, 71

    URLs, 33

    user accounts, 15

    weblogs, 72

    wikis, 75

    workspaces, 65

And Not operator, using in searches, 99

And operator, using in searches, 98

ApeosPort, and scanning documents, 53

Archive (Edit Selected menu), 40

Archive Server, 105

    archiving content to, 106

    restoring content from, 106

archiving content

    about, 105

    automatically, 105

    manually, 106

asterisk, using in searches, 99

## B

background jobs, 37

blog, See weblog

booleans, See logical operators

## C

calendar

    See also favorite calendars

    adding to a container, 32

    applying permissions to contents, 38

    changing access list, 36

    changing its location, 39

    changing owner, 37

    changing properties, 34

    changing views, 34

    deleting, 42

    viewing change history, 35

    viewing properties, 34

calendar portlet (workspace), 65

    changing properties, 69

    changing views, 69

calendar view

    day view, 34, 69

    month view, 34

    week view, 34, 69

change history, viewing for objects, 24, 35

Change Location (Edit Selected menu), 40

Change Owner (Edit Selected menu), 40

changing location of object, 39

    using copy, cut, and paste, 40

changing properties

    content rule, 93

    group account, 22

    notification, 58

    object, 34

    space, 28

    user account, 16

    version, 49

checking in an edited document, 47

checking out a document, 47

collection

    See also personal collection

    about, 31

    adding, 32

    adding document to, 43

    applying permissions to contents, 38

    changing access list, 36

    changing its location, 39

    changing owner, 37

    changing properties, 34

    changing views, 33

    deleting, 42

    editing multiple objects in, 40

    setting up for routing documents, 83

    viewing change history, 35

    viewing properties, 34

    zip and download, 41

collection view

    email view, 33

    images view, 33

    list view, 33

comments



- adding to a document, 50
- adding to weblog entry, 74
- deleting from weblog entry, 75
- viewing for document, 50
- viewing for weblog entry, 74
- content portlet (workspace), 65
  - changing properties, 69
- content rule
  - about, 91
  - about disabled content rules, 93
  - changing, 93
  - creating, 91
  - deleting, 93
  - event triggers, 91
  - restoring after deleting, 93
- Copy (Edit Selected menu), 40, 41
- Copy Shortcuts (Edit Selected menu), 41
- cover sheet, *See* scan cover sheet
- CPX user, 15
- creating accounts
  - group account, 21
  - user account, 15
- Cut (Edit Selected menu), 40, 41

## D

- DataGlyph, 51
- day view, calendar, 34, 69
- Delete (Edit Selected menu), 41
- deleted routing tasks
  - viewing all, 89
  - viewing for document, 90
- deleting
  - completed routing tasks you assigned, 84
  - content rule, 93
  - expired topics, 72
  - group account, 25
  - notification, 58
  - object, 42
- discussion
  - about, 70
  - adding to a container, 70
  - adding topics, 71
  - applying permissions to contents, 38
  - changing access list, 36
  - changing its location, 39
  - changing owner, 37
  - changing properties, 34
  - deleting, 42
  - setting expiration date for topics, 70
  - viewing change history, 35
  - viewing properties, 34
- document
  - about, 43

- adding comments to, 50
- adding new version of existing, 47
- adding to collection, 43
- adding using drag and drop, 44
- applying permissions to versions, 39
- archiving, 106
- changing access list, 36
- changing its location, 39
- changing owner, 37
- changing properties, 34
- checking in new version, 47
- checking out, 47
- deleting, 42
- downloading, 45
- editing, 47
- exporting, 50
- generating reports, 35
- locking, 50
- restoring from Archive Server, 106
- routing to users, 80 to 82
- saving scanned document to a collection, 53
- scanning at an ApeosPort, 53
- scanning using scan cover sheets, 51
- unlocking, 50
- viewing, 45
- viewing comments, 50
- viewing content and properties, 45
- viewing deleted routing tasks, 90
- viewing in HTML format, 46
- viewing in PDF format, 46
- viewing its version history, 48
- viewing properties, 34
- viewing routing tasks in progress, 90
- zip and download, 41
- DocuShare, 11
  - accessing, 12
  - and WebDAV folders, 111
  - icons, 31
  - logging in, 14
  - logging out, 14
- DocuShare Archive Server, 105
- DocuShare federated server, 19
- DocuShare federation, 19
- DocuShare objects, *See* objects
- DocuShare user, 15
- domain
  - changing for group, 24
  - changing for user, 18
- downloading a document, 45
- drag and drop
  - using to add documents, 44

## E

- Edit Selected menu, 40
- editing a document, 47
- email message
  - limiting number received for notifications, 56
  - receiving for a notification, 56
  - receiving when routing task is assigned, 87
  - sending to a group, 24
- email view, collection, 33
- event
  - adding to calendar, 33
  - changing access list, 36
  - changing owner, 37
- expired topic
  - deleting, 72
  - viewing, 72
- exporting a document, 50

## F

- favorite calendars, 103
  - adding, 103
- favorites
  - adding objects to, 101
  - removing objects from, 102
  - viewing, 101
- federated server
  - mapping to, 19 to 20
  - removing mapping, 20
  - searching, 96, 97 to 98
- feed, using to view updated content on DocuShare, 55

## G

- Generate Report (Edit Selected menu), 41
- Go to menu, 13, 27
- group account
  - changing domain, 24
  - changing group members, 22 to 23
  - changing group owner, 23
  - changing properties, 22
  - creating, 21
  - deleting, 25
  - searching for, 25
  - sending email to members, 24
  - viewing change history, 24
  - viewing list of, 25
  - viewing list of groups of which you are a member, 104
  - viewing properties, 22
  - viewing usage quotas, 22
- guest user, 15

viewing what's new on DocuShare, 95

## H

- history
  - activity, viewing, 18
  - change, viewing, 24, 35
  - document version, viewing, 48
- home page, 12
  - features, 12
- HTML format, viewing a document in, 46
- HTML tags, and wiki syntax, 76

## I

- icons
  - for objects, 31
  - for permissions, 36
- images view, collection, 33
- initial permissions, setting for objects, 36
- interwiki links, 78

## J

- JSR 168 portlet, accessing DocuShare in, 112

## K

- key icons, 36

## L

- LDAP (Lightweight Directory Access Protocol)
  - and user accounts, 15
  - changing group domain, 24
  - changing user domain, 18
  - changing user password, 17
  - changing username, 17
- list view, collection, 33
- locking a document, 50
- logged-in user, and appearance of user icon, 26, 66
- logging in, 14
- logging out, 14
- logical operators
  - types, 98
  - using in searches, 97 to 98

## M

- Manage permission, 32
- mapping a user account to a federated server, 19 to 20
- members

- changing for group, 22 to 23
- sending email to group, 24
- membership group for space
  - changing group members, 29
- membership group for workspace, 65
  - changing group assigned, 67
  - changing group members, 66 to 67
- membership portlet (workspace), 65
  - changing properties, 69
- month view, calendar, 34
- moving content between spaces, 30
- My DocuShare
  - about, 101
  - and spaces, 101
  - setting a space My DocuShare to display after logging in, 28
  - viewing favorite calendars, 103
  - viewing favorites, 101
  - viewing groups of which you are a member, 104
  - viewing personal collection, 102
  - viewing personal trashcan, 103
- My Tasks
  - using to check tasks you assigned, 83
  - using to view progress reports, 85
  - using to view tasks assigned to you, 87

## N

- navigating DocuShare
  - with spaces, 27
- navigation bar, 13
  - with spaces, 27
- non alphanumeric characters, using in searches, 99
- notification
  - about, 55
  - adding, 56
  - changing properties, 58
  - creating a recipient list for, 57
  - customizing, 59
  - deleting, 58
  - events of interest, 55
  - requirements for using, 55
  - restoring after deleting, 58
  - time periods, 56
  - turning off selected event notifications, 56
  - viewing, 57
  - viewing properties, 58
  - viewing the ones you own, 57

## O

- object properties, 34

- objects
  - See also calendar; collection; discussion; document; event; group account; saved query; topic; URL; user account; weblog; wiki; workspace
  - about, 31
  - adding, 33
  - changing access list, 36
  - changing owner, 37
  - deleting, 42
  - disabling use of in a space, 28
  - editing multiple in collection, 40
  - generating reports, 35
  - icons, 31
  - restoring after deleting, 42
  - searching for, 96 to 98
- Or operator, using in searches, 99
- orphan object, 40, 42
  - adding to collection after restoring from Archive Server, 107
- owner
  - changing for group, 23
  - changing for object, 37

## P

- page footer
  - with spaces, 27
- Page Size property, using, 34
- paging, setting number of objects to display per page, 34
- password, changing, 17
- Paste (Edit Selected menu), 40, 41
- Paste (Move) to Space (Edit Selected menu), 30, 41
- PDF file, creating by scanning, 51
- PDF format, viewing a document in, 46
- permissions, 32
  - See also access list; initial permissions; setting for objects
  - applying to container, 38
  - applying to document versions, 39
  - changes processed in the background, 37
  - Manage permission, 32
  - Read Content permission, 32
  - Read History permission, 32
  - required for tasks on six-permission site, 108
  - Write Content permission, 32
  - Write Properties permission, 32
- personal collection, 102
  - adding objects to, 102
- personal trashcan, 42
  - using, 103

- placeholder document, 43
- portal application, and DocuShare, 112
- portlet, accessing DocuShare in, 112
- preferred version
  - and maximum versions, 44
  - changing, 48
  - defined, 48
- progress reports, viewing, 85
- properties
  - changing for space, 28
  - viewing and changing for objects, 34
  - viewing and editing with document content, 45

## Q

- question mark, using in searches, 99
- quotas, usage, viewing, 17, 22

## R

- Read Content permission, 32
- Read History permission, 32
- Read-Only user, 15
- recipient list
  - changing for document routing, 82
  - creating for notification, 57
- removing user account mapping from a federated server, 20
- Rename (Edit Selected menu), 41
- rendition
  - viewing for versions, 49
  - viewing HTML, 46
  - viewing PDF, 46
- reply
  - adding to topic, 71
  - attaching documents, 71
- reports, generating document, 35
- reports, generating object, 35
- reserved characters, using in searches, 99
- Restore (Edit Selected menu), 40
- restoring archived content, 106
- restoring deleted objects, 42, 58, 93
- retain login for future, 14
- Route (Edit Selected menu), 41
- routed document
  - acknowledging receipt of, 89
  - approving, 87
  - disapproving, 87
  - publishing new version of, 85, 86
  - removing after sent for information, 89
  - reviewing, 88
- routing a document
  - about, 80

- automatically after adding to collection, 83
- including additional documents, 81
- routing order, 81
- to users, 80 to 82
- types of routing tasks, 81
- using a saved Routing Slip, 81

- Routing Slip, 80
  - private, 82, 83
  - re-using, 81
  - saving, 82
- routing tasks
  - checking status of your tasks, 83 to 84
  - deleting completed, 84
  - viewing all deleted, 89
  - viewing for document, 90
  - viewing tasks assigned to you, 87

RSS feed, See feed, 55

## S

- saved query
  - adding to container, 99
  - changing access list, 36
  - changing its location, 39
  - changing owner, 37
  - changing properties, 34
  - deleting, 42
  - viewing change history, 35
  - viewing properties, 34
- saved Routing Slip, using, 81
- saving
  - a Routing Slip, 82
  - scanned document to a collection, 53
  - search query, 99
- scan cover sheet
  - creating, 51
  - deleting, 52
  - using, 43, 52
- scanned document
  - checking length of time in temporary collection, 53
  - receiving URL after saving, 53
  - saving to a collection, 53
- scanning documents
  - about, 51
  - at an ApeosPort, 53
  - using scan cover sheets, 43, 51
- Search Available To, defined, 36
- search words, separator, 96
- searches, 95
  - See also saved query
  - running, 96 to 98
  - saving, 99

- using non alphanumeric characters, 99
  - using wildcards, 99
- searching for objects, 96 to 98
  - combining search terms, 97 to 98
  - finding user and group accounts, 25
  - on federated servers, 96, 97 to 98
  - running a word search, 96
  - using search options, 96
- shortcuts portlet (workspace), 65
  - adding objects to, 68
  - changing properties, 69
  - removing objects from, 68
- site-wide trashcan, 42
- snippet (document), showing and hiding in search results, 98
- spaces
  - about, 27
  - and My DocuShare, 101
  - changing membership group members, 29
  - changing properties, 28
  - controlling access to, 28
  - disabling object classes, 28
  - moving content between, 30
  - navigating, 27
  - selecting themes, 28
  - setting home space, 28
- stemming, 95

## T

- tasks, See routing tasks
- temporary scan collection
  - checking how long scanned documents are stored, 53
  - moving scanned document from, 53
- theme
  - and weblogs, 73
  - and wikis, 76
  - selecting for site, 18
  - selecting for space, 28
- tilde, use of in searches, 96
- topic
  - adding to discussion, 71
  - attaching documents, 71
  - changing access list, 36
  - changing owner, 37
  - deleting expired, 72
  - replying to, 71
  - viewing expired, 72
- trashcan
  - personal, 42
  - site-wide, 42

## U

- unlocking a document, 50
- uploading a document, 43
- URL
  - adding, 33
  - changing access list, 36
  - changing its location, 39
  - changing owner, 37
  - changing properties, 34
  - deleting, 42
  - viewing change history, 35
  - viewing properties, 34
- usage quotas, viewing, 17, 22
- user account
  - and user levels, 15
  - changing domain, 18
  - changing password, 17
  - changing properties, 16
  - creating, 15
  - mapping to federated server, 19 to 20
  - removing user account mapped to federated server, 20
  - searching for, 25
  - using a theme, 18
  - viewing activity history, 18
  - viewing list of, 25
  - viewing properties, 16
  - viewing usage quotas, 17
- user icon, and indication of logged-in status, 26, 66
- user levels, 15

## V

- version comments, adding, 47
- version history, viewing, 48
- version, document
  - adding edited document, 47
  - adding new document, 47
  - changing preferred version, 48
  - changing properties, 49
  - publishing routed document, 85, 86
  - specifying maximum to save, 44
  - viewing, 48
  - viewing properties, 49
  - viewing renditions, 49
- viewing
  - a document, 45
  - a document in HTML format, 46
  - a document in PDF format, 46
  - access list, 36
  - document comments, 50
  - document content and properties, 45
  - document version history, 48

- expired topics, 72
- new content, 95
- progress reports for routing tasks, 85
- version renditions, 49
- your activity history, 18
- viewing properties
  - group account, 22
  - notification, 58
  - object, 34
  - user account, 16

## W

- WebDAV folder, using with DocuShare, 111
- weblog
  - about, 72
  - adding to container, 72
  - and site themes, 73
  - changing its location, 39
  - changing properties, 34
  - deleting, 42
  - moderated, 72
  - posting entries, 73
  - viewing change history, 35
  - viewing properties, 34
- weblog entry
  - adding comment to, 74
  - adding to weblog, 73
  - approving, 74
  - deleting, 74
  - editing, 73
- week view, calendar, 34, 69
- What's New
  - using, 95
- wiki
  - about, 75
  - adding content, 76
  - adding to container, 75
  - and site themes, 76
  - attaching documents, 77
  - changing its location, 39
  - changing page name, 78
  - changing properties, 34
  - deleting, 42
  - editing methods, 75
  - inserting images, 77
  - linking pages, 76
  - printing wiki pages, 78
  - using interwiki links, 78
  - viewing change history, 35
  - viewing linked pages, 77
  - viewing properties, 34
- wiki syntax, and wikis, 76
- wildcards, using in searches, 99
- workflow, See routing a document

- workspace
  - about, 31, 65
  - adding, 65
  - adding content, 68
  - adding shortcuts, 68
  - changing membership group members, 66 to 67
  - changing portlet properties, 69
  - controlling access to, 66
  - re-assigning membership group, 67
  - removing shortcuts, 68
  - viewing calendars, 69
- Write Content permission, 32
- Write Properties permission, 32
- WYSIWYG editor, and wikis, 76

## Z

- Zip and Download (Edit Selected menu), 41