

Version 6.5
August 2009



DocuShare Content Management Platform

Reviewer's Guide



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Printed in the United States of America.

Changes are periodically made to this document. Changes, technical inaccuracies, and typographic errors will be corrected in subsequent editions.

Document Version: 6.5 (August 2009).

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Welcome

Welcome to the reviewer's guide for the Xerox DocuShare content management platform, version 6.5. This guide provides an overview of the DocuShare products and add-on modules, as well as detailed information on key product capabilities.

This Reviewer's Guide is primarily for those who would like to test and review core features of the DocuShare product line, including DocuShare Express, DocuShare, and DocuShare CPX. The bulk of this guide provides recommended tests to give you a first view of those features, and it also includes a brief overview of more advanced, add-on DocuShare functionality.

Introduction

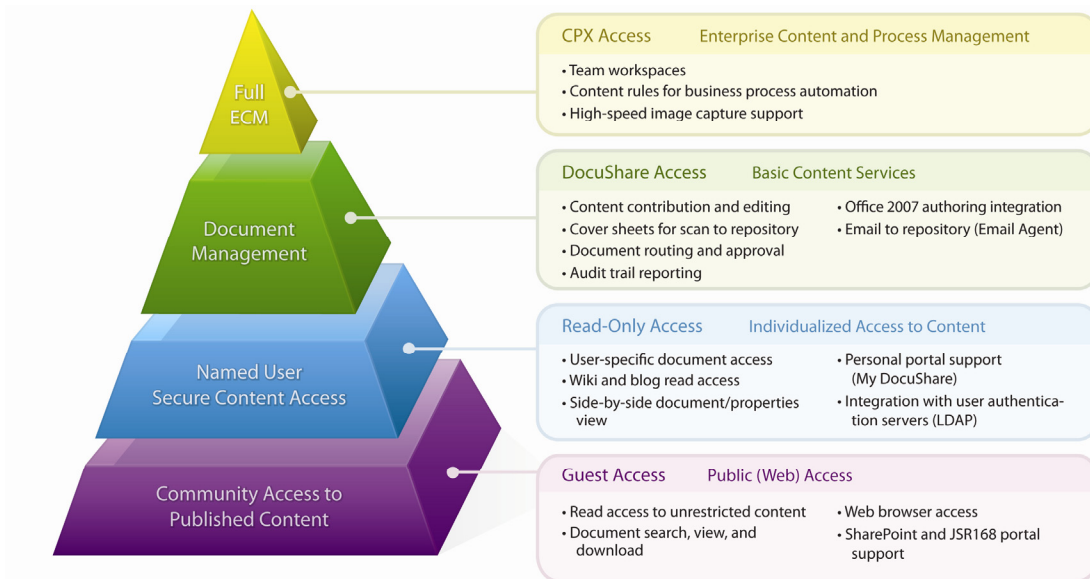
The Xerox DocuShare content management platform provides organizations of any size—from small workgroups to global enterprises—with a suite of product capabilities to address a wide range of business needs. DocuShare differentiates itself by offering one unified, easily deployed platform, with three distinct products:

- **DocuShare Express** delivers content management software tailored specifically for the SMB market to help manage both paper and digital business critical documents with ease and affordability.
- **DocuShare** provides document management, collaboration, image capture, and Web publishing capabilities to support ad hoc information sharing across the enterprise.
- **DocuShare CPX** extends beyond basic content services to meet end-to-end enterprise content management (ECM) requirements, including certified records management, sophisticated collaboration, and workflow capabilities for better governance and transformation of paper-centric processes into fully automated business applications.

The Xerox DocuShare content management platform is a highly-scalable Java 2EE application designed for large volumes of content, users, and traffic. This common, easily extensible platform enables organizations to rapidly broaden their DocuShare deployment as their needs grow.

Flexible levels of login access—Guest, Read-Only, DocuShare, and DocuShare CPX—allow businesses to control access to functionality based on operational requirements. Upgrading users to higher levels of access or moving from a basic DocuShare installation to DocuShare CPX works with a simple license key, eliminating content migration, system downtime, and service interruption.

User Access Levels



Xerox DocuShare is a proven technology that has been deployed to thousands of customers worldwide. DocuShare comes from Xerox Global Services, a leader in imaging and document management who offers deep and validated experience through world-class services, deployment, and support.

Product Features

DocuShare Express, DocuShare, and DocuShare CPX offer businesses a flexible, easy-to-deploy, Web-based software application that delivers sophisticated yet personalized content management capabilities to every knowledge worker. The DocuShare platform enhances the productivity and efficiency of knowledge workers across the organization with its unified and consistent user interface, industry-leading feature set, innovative personalization capabilities, virtually limitless scalability, and unprecedented performance.

The DocuShare platform offers:

- Trademark ease of use, administration, and deployment
- Cross-platform support with Web browser access providing seamless integration into any environment
- Enterprise-class scalability to support organizational and informational growth
- Sophisticated capabilities, including workflow, collaboration, security, and federated search across multiple servers
- State-of-the-art security and tracking, to enable the secure sharing of information at any level in the enterprise
- High-performance imaging with capture rates of more than 1000 images per minute (ipm) in continuous operation mode
- Support for over 50 million documents per server
- Multiple user access levels to support a wide variety of user access requirements
- “Guest” access to allow widespread viewing of content, without requiring a login (for both intranet and public-facing DocuShare websites)
- Multiple content entry points including: fax servers, scanning stations, and multifunction printers (MFPs); electronic forms (e-forms); and email
- Rich developer toolset to enhance business application integration
- Content control and easy information capture for corporate weblogs (blogs) and wikis
- Integration with a broad range of imaging and scanning devices, making paper documents as easy to manage as digital files
- High-capacity indexing with the Autonomy search engine

- An enhanced user experience with the downloadable DocuShare desktop Client, including configuration tools to push the application out to all users quickly and easily
- Portal integration for convenient access to DocuShare and DocuShare CPX sites from Microsoft SharePoint and JSR168-compliant portals
- Audit trails, additional permission levels, and optional records management (available as an add-on to DocuShare CPX) to meet corporate and industry compliance requirements

Core DocuShare Features

The DocuShare platform provides comprehensive features for content management, image capture and processing, collaboration, workflow and business process automation, and web publishing. Refer to the *Feature Comparison* section for a list of the features in each product.

Content Management

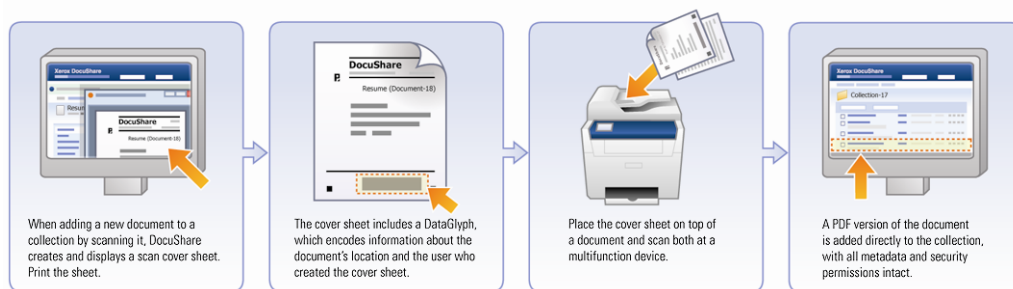
- Core content library features, such as: **document check-out/check-in**; **version control**; publishing of “**preferred**” **versions**; and **version history** enable easy document management
- Document- and version-based **permissions** for controlling access to content
- Industry-leading **full text and metadata search** capabilities speed finding business-critical information
- **PDF conversion** feature provides conversion of supported document types for easy document exchange of documents among users, regardless of the original document format
- **Personal portal**, My DocuShare, allows you to manage personal content as well as access site content from a single location
- **Access tracking** (or audit trail) captures the activities of all registered user levels on each DocuShare object, providing a complete history of changes
- **Integration with Microsoft Office** applications allows users to work using familiar desktop tools
- **WebDAV integration** allows users to work in desktop applications across platforms
- Optional **Microsoft Outlook integration** enables storing, managing, indexing, and drag-and-drop uploading of emails/email attachments to DocuShare from Outlook
- Optional **records management** helps companies meet compliance requirements by securely storing content as records, according to a retention schedule

Use Case—A small, but growing services company needs a better way to share information internally. The company has reams of documents, including legal contracts and many large documents. Employees spend hours looking for information, for example when a customer calls. To help save time, the company sets up DocuShare with a simple collection structure organized around departments. Workers start uploading documents so they can easily find them later with a quick text search. They also save versions of documents, such as contracts, so they can go back to older versions, if necessary. Larger amounts of documents such as customer records are dragged and dropped in bulk from PC hard drives with the DocuShare Client. Employees can log in from home or the road, so salespeople can get materials while traveling, and other staff who telecommute can continue working on documents from home.

Image Capture and Processing

- **Built-in direct scan to DocuShare** functionality for quick capture of paper documents into a searchable electronic database that can be organized into collections, assigned access permissions and security protocols, and made available for search and retrieval by authorized users located anywhere.
- **Scan cover sheets**, utilizing Xerox DataGlyph technology, allow easy scanning of single documents or batches of documents from any network scanner. Using a scan cover sheet, users can scan new documents and document versions, scan to their personal collection, and scan to designated collections and workspaces (DocuShare CPX only). The DataGlyph on the scan cover sheet directs the scanned document to the correct DocuShare location.

Using a Scan Cover Sheet to Add a New Document to DocuShare



- The **DocuShare Email Agent**, together with an email application, enables users to share email content by sending messages and attachments to DocuShare collections, workspaces (DocuShare CPX only), other users, and groups. Sending email messages to collections and workspaces lets users easily share, store, and retrieve messages as needed.

In addition, the Email Agent supports receiving cover sheets as email with attached JPEG, TIFF, or PDF files so that users can send documents to DocuShare by e-fax or scan-to-email. The Email Agent recognizes the cover sheet's unique DataGlyph and files the scanned content accordingly.

- A **free EIP connector** from TG Consulting leverages the Xerox Extensible Interface Platform™ (EIP) to enable users to access DocuShare document management features from the touch screen of an EIP-enabled Xerox WorkCentre. Using the EIP connector, users can scan new documents to DocuShare, retrieve documents stored in collections, and initiate document workflows from the device. This capability provides access documents when away from a computer.
- The **Content Intake Manager enables rapid, high-volume intake** and incorporation of content from multiple sources, including scan workstations, e-forms servers, and production scan devices, supports ingestion of diverse content types and input into sophisticated workflows.
- **Tight integration with Xerox and third-party products**, such as Xerox FreeFlow SMARTsend, Xerox SmartDocumentTravel, ScanFlowStore from X-Solutions, Kofax Ascent Capture, NSI AutoStore, Nuance PaperPort, Omtool Accuroute, and others via integration through DocuShare SDKs.

Use Case—A paper-intensive government agency wants to cut paper use to save time, reduce storage, and prove that it's taking steps to go "green." The agency has one Xerox multi-function printer (MFP), but also scan-to-e-mail devices from other vendors. It sets up the MFP with the EIP connector for simple direct scanning to DocuShare. This allows administrative staff to regularly scan mail received from the public into a "daily correspondence" folder. Employees also use scan cover sheets to scan documents into personal DocuShare folders, or into other target locations. They can scan from the MFP, or from other devices using scan-to-email (the administrator assigns an email address to DocuShare). As a result, instead of going to a file cabinet or searching through papers on a desk, users simply search for a document in DocuShare. Additionally, with the documents stored in an electronic repository, disaster recovery plans can be implemented to protect their content.

Ad Hoc and Content-centric Collaboration

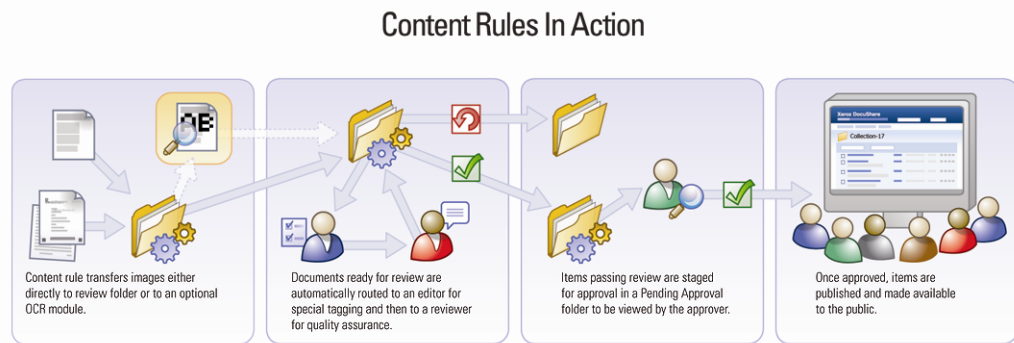
- **Threaded discussions and document commenting** facilitate an exchange of ideas
- **WYSIWYG blogs and wikis** enable easy collaboration and information sharing in a controlled, auditable environment; blogs can also be moderated, requiring entries to be routed for approval before publishing
- **Web-based collaborative workspaces** enable organizations to assemble task-specific information, people, and reference material in a centralized area, with presence detection showing when a workspace member is logged in.
- **Email notification** of new and changed content keeps work groups up-to-date
- **RSS feed support** enables users to view updated content in collections and other types of containers outside of DocuShare

Use Case—A large organization recently expanded by acquiring several smaller companies. It must now promote collaboration among groups who don't know each other and use a variety of applications and operating platforms. A cross-organization project team, consisting of people in the U.S., Europe, and Asia, is working on a time-sensitive project to develop a new product. The team leader creates a DocuShare CPX web-based workspace with a wiki for developers to document the product design; they can also log daily activities in blogs or start discussions. When a team member sends email related to the project, he or she copies the workspace email address and all emails are saved in the workspace. Engineers can be notified by email or RSS feed when new documents or versions of project spreadsheets are added. Finally, when a manager in India checks in each morning, he can see through the presence icon whether any team members in the U.S. are currently on-line.

Workflow and Business Process Automation

- **Wizard-based document workflow capabilities** enable casual users, without IT assistance, to easily route documents for review, approval, or information and track the progress of routing tasks

- Ability for business process managers to create **content rules** that determine and automate how content moves through an organization. A content rule can be created for any site object and defines an event that triggers a series of easily predefined actions to run automatically. For example, a content rule can move a scanned invoice to a specified collection once it has been approved.



- Ability of process managers to establish rules for **exporting documents** to external servers and web sites, creating links to third-party applications or processes that require content but live outside the firewall
- **DocuShare Enterprise Workflow**, available with the DocuShare Developer Network, enables system integrators to create custom workflows for advanced process automation needs. Based on Cardiff LiquidOffice™, DocuShare Enterprise Workflow provides a graphical workflow design studio for developing complex processes.
- DocuShare LiquidOffice™ Connector adds **on-line forms capability** to DocuShare or DocuShare CPX, enabling capture, indexing, and rendition of information from electronic and paper-based forms and the ability to trigger workflows when forms are submitted

Use Case—To streamline activities in a Human Resources department, process managers design a process for the acceptance, acknowledgment, review, and referral of job applications and resumes. DocuShare CPX automatically sends resumes via email and generates an email acknowledgment to the applicant; routes applications to the appropriate hiring manager; distributes documents to the appropriate people for consideration; places resumes in an interview folder; moves the resume to a hold file if rejected, and mails a response letter to the applicant.

Web Publishing

- **“Guest” and “Read-Only” access** supports Web information publishing for external and internal constituents—a partner extranet or public internet website can be enabled at no extra charge
- **Addressable Web links** for any stored content (DocuShare handle)
- **Automatic HTML conversion**, so users across platforms can view a document’s content without the application installed on their desktop
- **Web-based site administration**
- Customizable, **template-driven DocuShare Web interface**
- **Customizable wiki pages** for easily updated Web 2.0 publishing
- **Integration with portals** through JSR168 support, Web parts for Microsoft Office SharePoint Server (MOSS) portal, and DocuShare SDKs

Use Case—A company with an extensive intranet site wants an easy way for people to publish documents internally, to share across groups. When a worker uploads a document to DocuShare, she can email the link to others rather than sending the document as an attachment. Through “Guest” and “Read-Only” licensing, many people across the company can access common documents without needing a DocuShare license, viewing them as HTML if they do not have a particular desktop application. Other internal websites can also link to them, and for frequently updated documents like policies or procedures, users make changes without going to a webmaster. The administrator customizes DocuShare’s Web UI to add the corporate logo, and customizes several wiki pages with graphics and colors to suit particular departments.

Administration Interface

For administering a site, DocuShare provides a consistent browser-based interface that does not require Active X controls, Java applets, or applications such as Microsoft Management Console (MMC) for remote administration. This allows administrative tasks to be distributed among workers and performed regardless of location or access to specific tools. Additionally, an administrator can manage multiple DocuShare sites from a single computer.

Administrative functions that can be performed using the interface include:

- object and metadata management
- account management
- LDAP or directory configuration
- services setup including workflow management
- content management
- site customization and configuration
- logging setup
- third-party application setup and configuration.

All Administration UI pages provide instructions for using the page. When add-on modules are enabled, pages for configuration and usage are added to the UI.

This guide includes several tests for the administrator. For a complete overview of DocuShare administration, refer to the *DocuShare Administrator Guide* located on the DocuShare site **Help Desk**.

Advanced Features and Add-on Modules

DocuShare Developer Network (DSDN)

The DocuShare Developer Network provides a suite of programming tools, documentation, support, and training for further development and customization of DocuShare. Its application program interfaces (APIs), integration components, J2EE architecture, and flexible programming options allow value-added resellers (VARs), system integrators (SIs), and other partners and customers to build collaboration, imaging, workflow, and compliancy solutions or industry-specific solutions. Developers can access DSDN resources at <https://docushare.xerox.com/dsdn>.

DocuShare Records Manager

The DocuShare Records Manager add-on for DocuShare CPX 6.5 tightly integrates records management capabilities with the Web and Client interfaces, to support organizational compliancy and governance. The product is designed so that organizations can assign classification, declaration, and administration responsibilities on a user-by-user basis, simplifying the process by assigning more complex tasks to dedicated records managers. Unlike competitive products, DocuShare Records Manager enables users throughout an organization to easily classify electronic documents and email messages as records during any part of a work process, knowing that a qualified records manager will review the classification before the items officially become records.

DocuShare Content Encryption

DocuShare Content Encryption for DocuShare CPX 6.5 enhances site security by providing automatic content encryption of all uploaded documents. Document content is encrypted using a symmetric key cryptography algorithm before it is written to the content store. The encryption keys are stored in the relational database, with one unique key per document version and rendition. Document content is decrypted when it is accessed through standard DocuShare interfaces. This prevents any system intruders from reading document content, even if they gain access to the storage server either remotely or physically.

DocuShare High Scalability Kit

The DocuShare High Scalability Kit allows customers to scale their DocuShare sites to volumes above 50 million documents while maintaining optimal performance. Recommended for sites with more than 5 million documents, the High Scalability Kit enables the configuration of underlying subcomponents, such as the database, search index, and file system, to support the efficient handling of large volumes of documents. Also included with the kit is an elevated level of customer support to ensure successful implementation and continued operation.

DocuShare OCR (Optical Character Recognition)

The DocuShare OCR add-on module to DocuShare CPX 6.5 offers server-side optical character recognition for scanned documents. The module provides “one-button” OCR conversion of captured documents, either through an end-user UI or programmatically, ensuring that all content in the repository is fully text-searched.

DocuShare Archive Server

The DocuShare Archive Server enables automatic or manual archiving of out-of-date content on a separate DocuShare server and protects it from unauthorized access. Archived content is preserved its access controls, locations, fully searchable indexes, and other metadata. Using the familiar DocuShare search interfaces, users can search the Archive Server and restore archived content to the primary DocuShare server with a single click

Feature Comparison

The following table provides a comparison of the key features available in DocuShare Express, DocuShare, and DocuShare CPX.

Product Feature	DocuShare Express	DocuShare	DocuShare CPX
Full Text and Metadata Indexing	▪	▪	▪
Document Versions, Check-in / Check-out	▪	▪	▪
Access Control and Permissions	▪	▪	▪
Expanded Permission Set	▪	▪	▪
Notification of New and Changed Content	▪	▪	▪
Audit Trail – Query and Reporting	▪	▪	▪
Document Routing and Approval	▪	▪	▪
Integrated View of Document Content and Metadata	▪	▪	▪
Blogs / Wikis / Comments	▪	▪	▪
Scan via Cover Sheets to Collections and Documents	▪	▪	▪
Guest Access	▪	▪	▪
WebDAV Support	▪	▪	▪
Xerox Extensible Interface Platform (EIP) Support	▪	▪	▪
LDAP Support	▪	▪	▪
Third-party Integration	▪	▪	▪
French, German, and Spanish Language Packs	▪	▪	▪
Windows Platform	▪	▪	▪

Product Feature	DocuShare Express	DocuShare	DocuShare CPX
Federated Search Support		▪	▪
Integration with Microsoft Windows, Office, and Outlook		▪	▪
Email Agent		▪	▪
Database Connectors		▪	▪
Linux / Solaris Platforms		▪	▪
Archive Server		Add-on	Add-on
High Scalability Kit		Add-on	Add-on
Unlimited Guest		Add-on	Add-on
Enterprise Workflow			▪
Collaborative Workspaces			▪
Content Rules			▪
Document Export			▪
Content Encryption			▪
Records Manager			Add-on
OCR Service			Add-on

New Features in Version 6.5

Version 6.5 includes several new end-user features as well as significant performance and scalability enhancements. The following are some of the primary new features of the DocuShare platform added since version 6.0. The end-user tests in this guide illustrate many of these additions.

DocuShare 6.5 Platform: All Products

- An expanded set of permissions offers additional levels of access to objects and object properties and permissions. An administrator can optionally configure a site to use six permissions for objects instead of three. Version 6.5 provides these new permissions: Read Properties, Read Content, Read History, Write Properties, Write Content, and Manage.
- Usage quotas enable an administrator to assign limits to the amount of content a user can store on the site. Users can view their assigned quotas.
- Color schemes called themes allow users to individually customize the look of DocuShare web pages. Four themes are provided.
- Microsoft SQL Server 2005 Express Edition is the default database provided with DocuShare.
- DocuShare index and search functions utilize the Autonomy IDOL Server.
- Performance and scalability improvements. DocuShare now supports up to 50 million documents on a server.

DocuShare Express 6.5 and DocuShare 6.5

- Users assigned the DocuShare user level can create scan cover sheets for collections.
- Users assigned the DocuShare user level can view an object's change history and a user's activity history.

DocuShare CPX 6.5

- Users can edit content rules after they are created. An Edit link on the Properties page for a content rule allows users to make any changes.

Administration UI

- New settings on the Site Configuration page let an administrator enable or disable the Content Map, Show All button, and personal trashcan.
- A new Permissions page in the Admin UI provides options previously located on the Site Configuration page and includes new options for setting permissions.
- A new access tracking operation, Failed Login, records when a login attempt failed. This operation appears on the Access Operation Tracking page in the Admin UI.

New DocuShare Add-on Modules

- **High Scalability Kit**—To support version 6.5's increased ability to manage large volumes of content, a High Scalability Kit is available. The kit allows customers to scale their DocuShare sites to volumes above 50 million documents while maintaining optimal performance. Recommended for sites with more than 5 million documents, the High Scalability Kit enables the configuration of underlying subcomponents, such as the database, search index, and file system, to support the efficient handling of large volumes of documents. Also included with the kit is an elevated level of customer support to ensure successful implementation and continued operation.

Recommended Tests

To facilitate a thorough review of the DocuShare platform, the following tests are recommended. If any assistance is required during the testing process, please use the Xerox technical support information provided in the *Contact Information* section of this document.

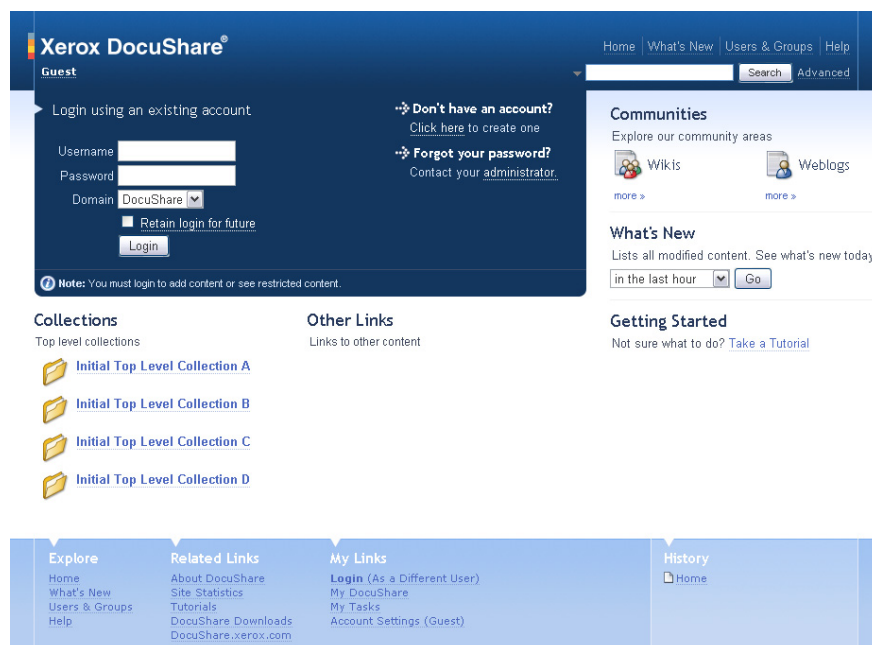
DocuShare Web UI Tests

Accessing DocuShare

DocuShare is easily accessed through a Web browser. When you install DocuShare, it automatically creates the Web environment for you. Any authorized user can immediately add content, set permissions, and manage document processes. If a site is set up to allow **guest** access, non-registered individuals can browse and access unrestricted content.

For most users, the Web UI is the preferred interface to DocuShare. Additionally, the DocuShare Web UI meets the U.S. government's Section 508 guidelines for accessibility.

The **DocuShare Home Page** provides a consistent portal for accessing all the DocuShare content, user accounts, features, and site administration tools.



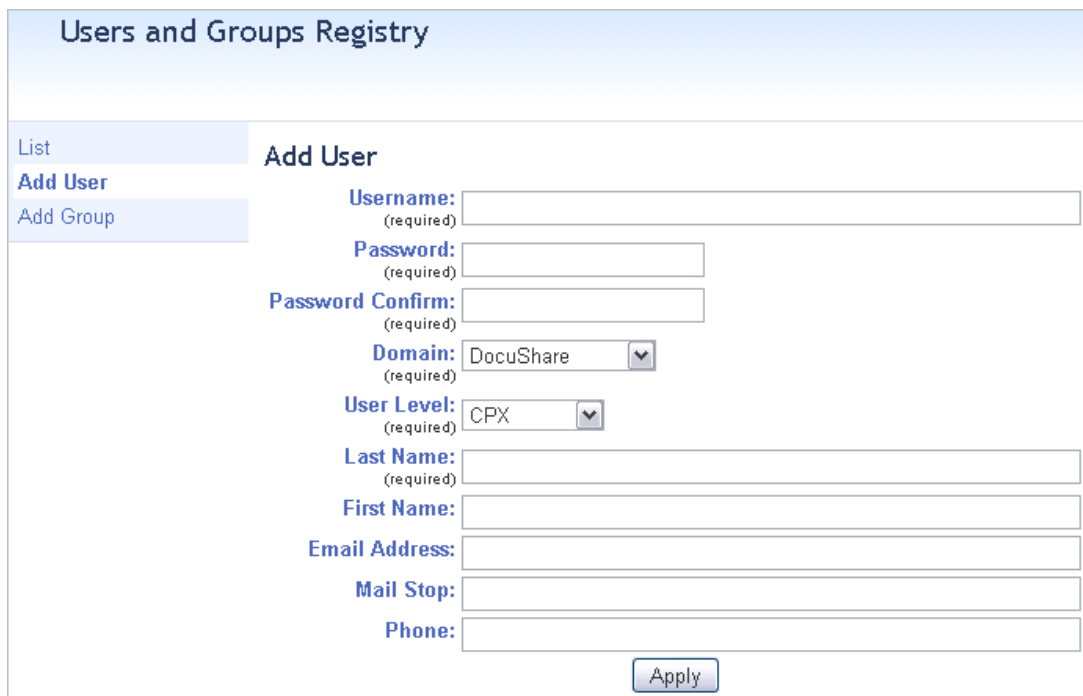
Adding User and Group Accounts

DocuShare provides two types of accounts: individual user accounts and group accounts. An administrator determines who can create each type of account on your site. When a user account is created, either by you or an administrator, it is assigned a user level (Read-Only, DocuShare, CPX). The user level controls the level of access to site content and 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. A site can include all three user levels.

To add and manage content, you need a user account.

Creating a user account

1. On the navigation bar, click the **Users & Groups** link.
2. Click the **Add User** link.



The screenshot shows the 'Users and Groups Registry' interface. On the left is a navigation menu with 'List', 'Add User', and 'Add Group'. The main area is titled 'Add User' and contains the following fields:

- Username:** (required) [text input]
- Password:** (required) [text input]
- Password Confirm:** (required) [text input]
- Domain:** (required) [dropdown menu, currently showing 'DocuShare']
- User Level:** (required) [dropdown menu, currently showing 'CPX']
- Last Name:** (required) [text input]
- First Name:** [text input]
- Email Address:** [text input]
- Mail Stop:** [text input]
- Phone:** [text input]

An 'Apply' button is located at the bottom right of the form.

3. On the Add User page, enter the following information:

Username—The name you want to use to log into DocuShare. When creating objects, the username is specified as the object's owner. Your username is not case-sensitive.

Password and Password Confirm—The password you want to use to log into DocuShare. Your password is case-sensitive.

Domain—An internal domain name. This field appears if your site uses the LDAP feature (for iPlanet/Sun ONE LDAP or Microsoft Active Directory).

User Level— The level of access to site content and functions. We recommend creating at least one CPX user to enable features described in many of the tests in this guide.

Last Name—Your last name. Users are listed on the DocuShare site by their first and last names.

4. Enter any optional information.
5. Click **Apply**. Your username appears on the navigation bar, indicating that you are logged in.
6. Create another user account for use later.

Changing an account's user level

Using the Administration UI, an administrator can easily change the user level assigned to individual accounts. This allows a site to control which users can access content and perform specific functions as operational and business needs change.

Change User Level

- Use this page to change the user level of site accounts.
- Choose to display active or inactive users, select the accounts that you want to change, and then click the Update button to assign the selected accounts to the selected user level.

License Status:

- 98 out of 100 licenses are available at the Read-Only level.
- 98 out of 100 licenses are available at the DocuShare level.
- 97 out of 100 licenses are available at the CPX level.

Active Status:

Search:

Users:

Buckner, Jane (User-13, j buckner:DocuShare, read-only)
Morgan, Cathy (User-11, cmorgan:DocuShare, CPX)
Santos, Henry (User-14, hsantos:DocuShare, CPX)
Wang, David (User-15, dwang:DocuShare, DS)
Wang (User-12, hwang:DocuShare, read-only)
Wright, Suzanne (User-16, swright:DocuShare, DS)

Change to User Level:

Activate all inactive

Changing a user's usage quota

Usage quotas enable an administrator to limit the amount of content that a user can store on DocuShare. Users can view their assigned quotas as well as check their current usage.

An administrator can limit:

- The number of all documents (includes email attachments, documents attached to wiki pages, etc.).
- The size, in MB, of document content (includes content in all renditions of all versions of documents).

Change User Quotas

- Use this page to assign content quotas to users.
- Select the user accounts you want to assign quotas to and then set the quotas.

Search:

Users:

Morgan, Cathy (User-11, cmorgan:DocuShare, CPX)

Set quotas for selected users:

Document Count Quota

Do not change

Unlimited

Limit to:

Not set (default to highest group setting)

Document Content Size Quota (MB)

Do not change

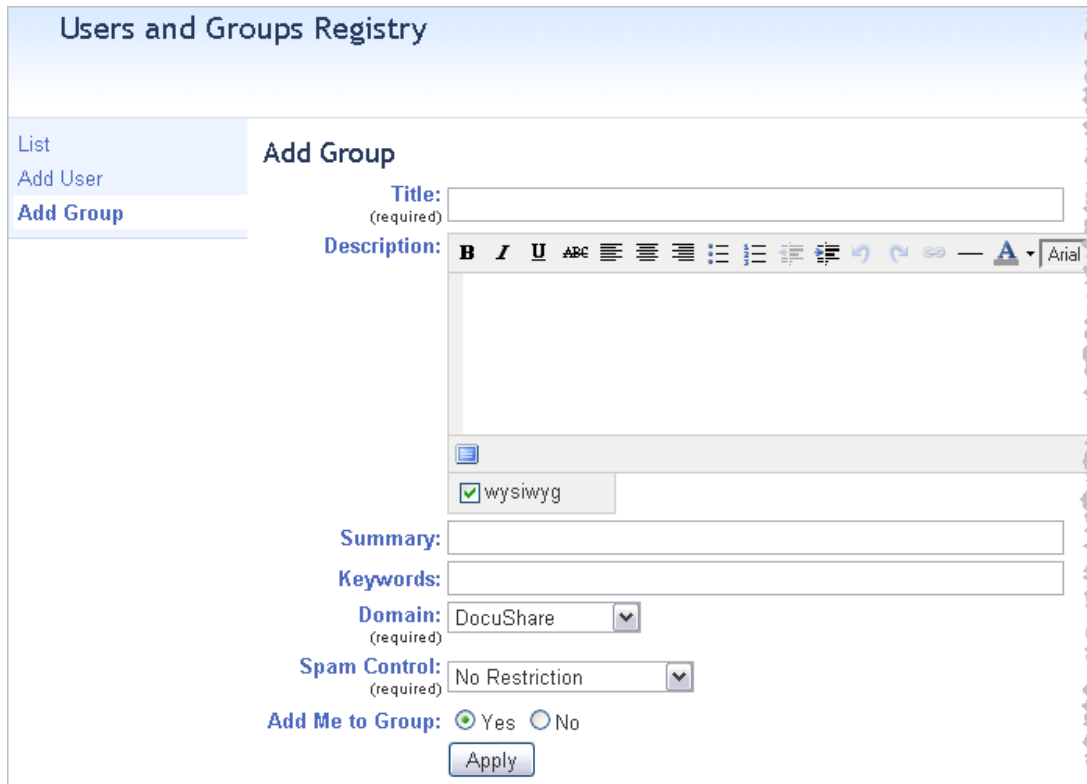
Unlimited

Limit to:

Not set (default to highest group setting)

Creating a group account

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add Group** link.



The screenshot shows the 'Users and Groups Registry' interface. On the left, there is a navigation menu with 'List', 'Add User', and 'Add Group' (highlighted). The main area is titled 'Add Group' and contains the following fields and controls:

- Title:** (required) text input field.
- Description:** rich text editor with a toolbar (bold, italic, underline, ABC, list, link, unlink, undo, redo) and a 'wysiwyg' checkbox checked.
- Summary:** text input field.
- Keywords:** text input field.
- Domain:** (required) dropdown menu with 'DocuShare' selected.
- Spam Control:** (required) dropdown menu with 'No Restriction' selected.
- Add Me to Group:** radio buttons for 'Yes' (selected) and 'No'.
- Apply** button.

3. On the Add Group page, enter the following information:
 - Title**—A name for the group. The name can contain spaces and punctuation marks, and can be identical to another group name.
 - Domain**—An internal domain name. This field appears if your site uses the LDAP feature (for iPlanet/Sun One LDAP or Microsoft Active Directory).
4. Enter any optional information.
5. Click **Apply**.

The Pick Members for Group page appears. On this page you choose the users and groups who will be the group members.
6. In the **Search** field, enter part of the username of the second user account you created; then click **Go**.

7. In the **Possible Users/ Groups** field, select the user and click the **Add** button.

The screenshot shows a web interface for selecting users. At the top, there are radio buttons for 'Show: Users' (selected), 'Groups', and 'Both'. Below is a search box with a 'Go' button and two buttons: 'Show All' and 'Show Favorites'. The 'Possible Users/Groups' list contains the following entries: 'Buckner, Jane (User-16, j buckner:DocuShare, DS)', 'Jones, Lee (User-17, ljones:DocuShare, CPX)', 'Santos, Henry (User-18, hsantos:DocuShare, DS)', 'Site Administrator (User-2, admin:DocuShare, CPX)', 'Wang, David (User-19, dwang:DocuShare, read-only)', and 'Wright, Suzanne (User-20, swright:DocuShare, CPX)'. The 'Add' button is highlighted with a mouse cursor, and the user 'Wright, Suzanne' is now listed in the 'Selected Users/Groups' field. An 'Update' button is located at the bottom right of the interface.

The user displays in the **Selected Users/Groups** field.

8. Click **Update**.

Adding Content to DocuShare

You add content to repositories called collections. By default, a site includes four top-level collections. An administrator can customize the site top-level collections. The type of content that you can add to collections includes: documents, email messages, and files; URL hyperlinks to other internal or public web sites; wikis; blogs; calendars; discussions; saved search queries; and other collections.

After you add an object to DocuShare, the object is assigned a unique **handle** (URL). This allows you to access any object on the site using its handle, as well as share the handle with others when you want to provide a link to content.

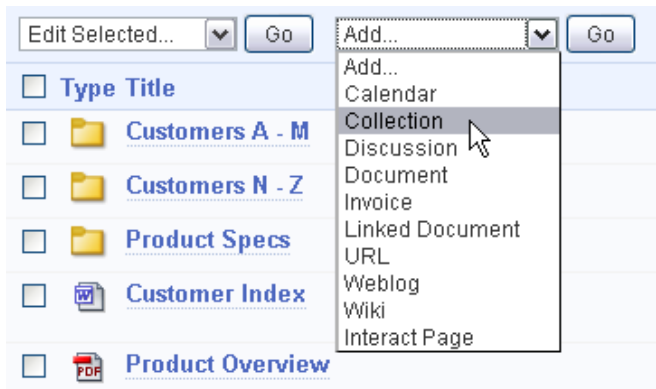
To add content, you must be logged in and have the appropriate permission to the collection. An administrator can set up a site to use either three or six permissions for access control. The use of six permissions provides finer access control to content and object information, such as properties and change history. DocuShare provides the permissions described below.

Three Permission Site	Six Permission Site
Reader allows the user or group to read the content of the object and view its associated properties and permissions.	Read Properties allows the user or group to view the object's properties and permissions.
Writer allows the user or group to change the object's properties and add new objects, including new versions of documents.	Read Content allows the user or group to read the content of the object.
Manager allows the user or group to delete the object, and change the object's permissions and owner.	Read History allows the user or group to view the object's change history.
	Write Properties allows the user or group to change the object's properties.
	Write Content allows the user or group to add new objects, including new versions of documents, and change the object, such as its location.
	Manage allows the user or group to delete the object, and change the object's permissions and owner.

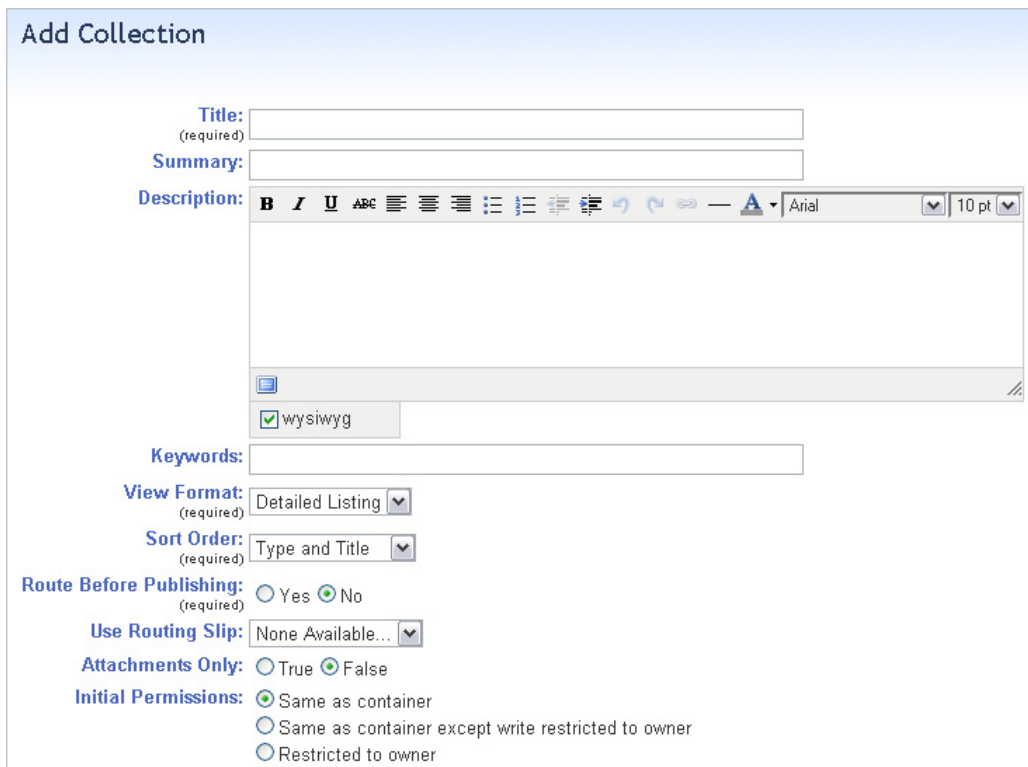
Adding content via the Web UI

Using the **Add** menu, you can create a variety of content on your site. You can create standard DocuShare objects and any custom objects an administrator creates.

1. On the navigation bar, click **Home**.
2. Open one of the top-level collections.
3. From the **Add** menu, select **Collection**.



4. On the Add Collection page, enter a **Title** for the collection.

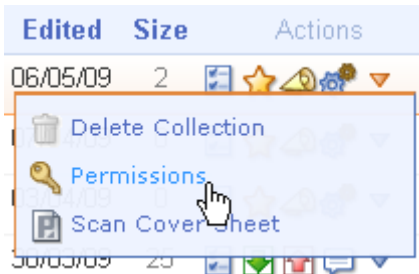
A screenshot of the 'Add Collection' form in the DocuShare web interface. The form is titled 'Add Collection' and contains several fields and options. The 'Title' field is required and is empty. The 'Summary' field is also empty. The 'Description' field is a rich text editor with a toolbar showing bold, italic, underline, and other formatting options. Below the description field, there is a 'wysiwyg' checkbox which is checked. The 'Keywords' field is empty. The 'View Format' dropdown is set to 'Detailed Listing'. The 'Sort Order' dropdown is set to 'Type and Title'. The 'Route Before Publishing' section has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Use Routing Slip' dropdown is set to 'None Available...'. The 'Attachments Only' section has radio buttons for 'True' and 'False', with 'False' selected. The 'Initial Permissions' section has radio buttons for 'Same as container', 'Same as container except write restricted to owner', and 'Restricted to owner', with 'Same as container' selected.

5. Enter any optional information.
By default, the new collection is assigned the top-level collection's permissions. You can change the Initial Permissions before adding the collection.
6. Click **Apply**.
7. Click the collection to open it.
8. Use the **Add** menu to add objects to the collection.

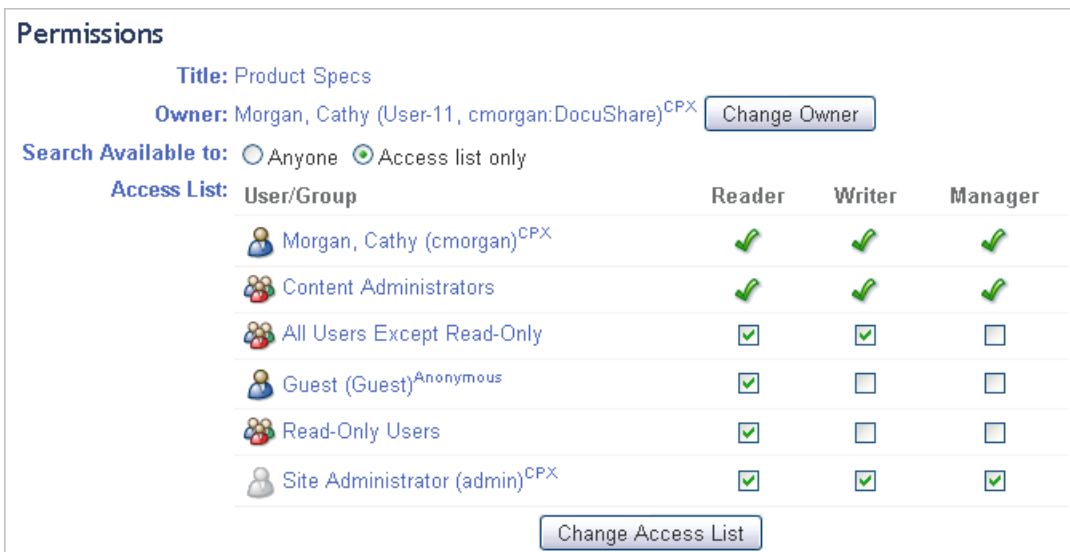
Setting permissions on content

By default, when you add an object to DocuShare it is assigned the container's permissions. As the user who added the object, you are its owner and can change the object's permissions.

1. From the object's **More Actions** menu, select Permissions.



2. On the Permissions page, click the **Change Access List** button.



3. On the Change Access List page, select the type of account you want to display from the **Show** field: **Users**, **Groups**, or **Both**.

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 access list 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 access list and click the **Remove** button.
7. Click **Update Access List**.

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

Adding content using a scan cover sheet

Scan cover sheets enable you to scan paper documents directly to designated documents, as new document versions; collections, including your personal collection; and workspaces.

To set up the scan cover sheet feature:

1. Log into DocuShare as an administrator.
2. On the DocuShare navigation bar, click **Admin Home**.
3. From the **Administration** menu, go to **Site Management | Site Configuration** and make sure **Enable SMB Scanning** is set to **Yes**.
4. From the **Administration** menu, go to **Services and Components | Content Intake | Edit** and select **GlyphScan** from the **Type** menu.
5. On the same page, select **Enabled**, and then click **Update**.

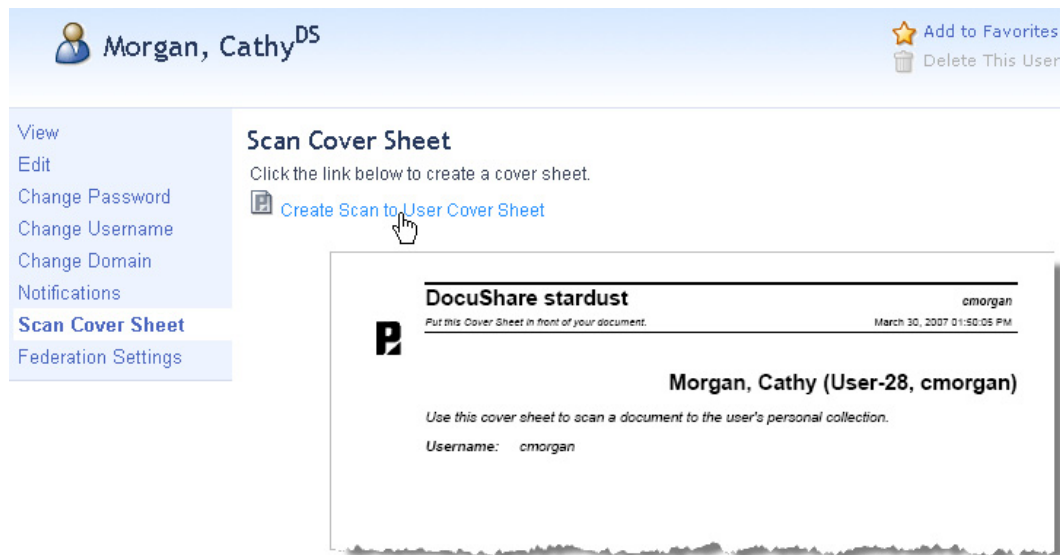
The scan cover sheet feature is now available to users.

Note: If this procedure does not enable the scan cover sheet feature, go to **Services and Components | Scan** and make sure **Integrate Scan Cover Sheet Feature with Scan Service** is set to **Yes**.

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.
2. On the View Properties page, click the **Scan Cover Sheet** link.
3. Click the **Create Scan Cover Sheet** link.

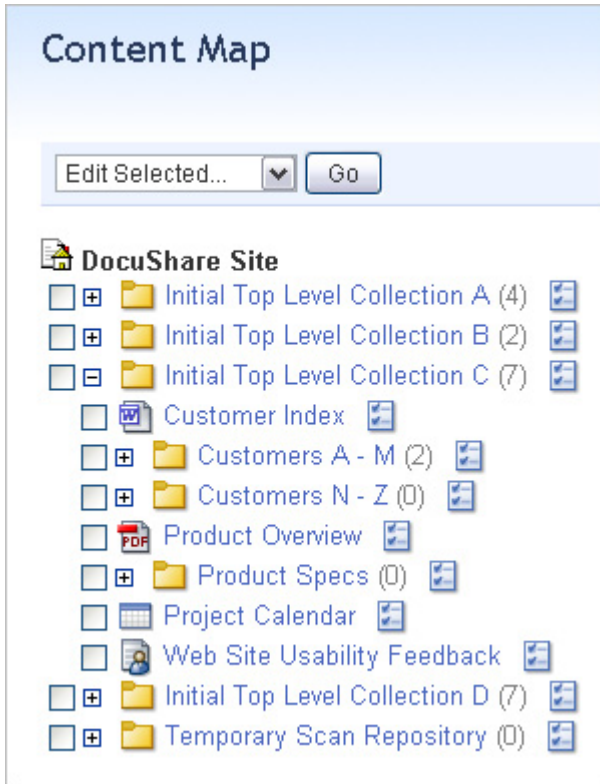
The cover sheet is created and opens in a separate window.



4. Print the cover sheet. Then close it.

Accessing Content

DocuShare provides a broad range of interfaces and methods for locating and accessing content. One method is to use the **Content Map**, which provides a hierarchical listing of site content (shown below). The site administrator controls whether or not Additional methods for accessing content are included in this section.



Accessing content from My DocuShare

You can quickly access content from a personalized home page called My DocuShare. The page includes areas called portlets from which you can access features such as your personal collection, favorite calendars, personal trashcan (if enabled), favorite objects, groups, and routing tasks as well as the top-level site content. DocuShare CPX includes additional portlets: the workspaces you can access and the online meetings you scheduled.

From any DocuShare page, click **My DocuShare** to access your personal home page.

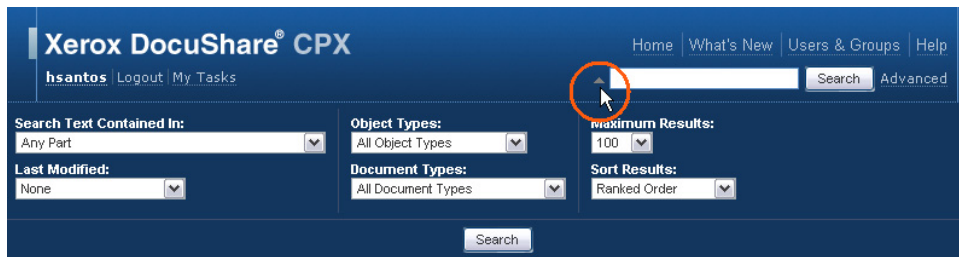
The screenshot displays the 'My DocuShare' personal home page. At the top, it says 'My DocuShare' and 'Your DocuShare Personal Home Page'. The page is organized into several portlets:

- Personal Collection:** A table showing items owned by 'cmorgan' as of 04/07/09. The items are 'Current Projects' (2 items), 'Status Reports' (0 items), 'Project Proposal' (19 KB), and 'Resources' (110 KB).
- Workspaces:** A section for accessing workspaces.
- Site Home:** A table showing top-level site contents owned by 'admin' as of 03/20/08. The items are 'Initial Top Level Collection A' (4 items), 'Initial Top Level Collection B' (2 items), 'Initial Top Level Collection C' (7 items), and 'Initial Top Level Collection D' (7 items).
- Favorite Calendars Combined:** A calendar view for 'Wednesday, July 8, 2009' showing a 'Staff Meeting' from 10:00 AM to 11:00 AM by 'cmorgan'.
- Personal Trashcan:** A section for managing items in the trashcan, currently showing 'None'.
- Favorites:** A list of favorite items including 'Product Specs' and 'Project Calendar'.
- My Groups:** A list of groups the user belongs to, including 'Documentation Workspace Membership Group', 'Our Project Membership Group', and various 'All Users' groups.
- Tasks:** A list of current tasks, including 'Review Product Brief'.

Using quick search features to find content

Using the search area on the navigation bar you can search for objects and content. The results are displayed in an ordered list, similar to the display of a collection's contents.

1. On the navigation bar, enter one or more words in the **Search** field.
2. Depending on the page from which you are running the search and whether or not your site is part of a federation, select a search scope from the **In** menu.
3. Click the small triangle next to the **Search** field to display the quick search options.



The screenshot shows the Xerox DocuShare CPX search interface. At the top, there is a navigation bar with links for Home, What's New, Users & Groups, and Help. Below this, the user's name 'hsantos' and links for Logout and My Tasks are visible. The main search area features a search bar with a 'Search' button and an 'Advanced' link. A red circle highlights the search bar, and a mouse cursor is pointing at the search button. Below the search bar, there are several filter options: 'Search Text Contained In' (Any Part), 'Object Types' (All Object Types), 'Document Types' (All Document Types), 'Last Modified' (None), 'Maximum Results' (100), and 'Sort Results' (Ranked Order). A 'Search' button is located at the bottom of the filter section.

4. Change any of the options to narrow your search and to control how the results are displayed.
5. Click the **Search** button.

The search results display.

Finding content using advanced search features

DocuShare advanced search features allow you to further narrow a search by combining search terms using logical operators and by entering specific date ranges.

1. On the navigation bar, click the **Advanced** link to display the Advanced Search page.

Advanced Search
Search Tips...

Search Text Contained In:
contains [] In Any Part [] + add search term

Search

Search Within:
The entire site []

Search Results View Options
Maximum Results: 100 []
Sort Results: Ranked Order []

Limit Search to Date Range:
(use the following date format: mm/dd/yyyy)
Create Date [] is after [] [] + add date range

Find Results With Numeric Range:
(Group) Document Content Size Quota (MB) [] between [] and [] + add numeric range

2. Under **Search Text Contained In**, enter a word that appears in a document on your site in the field next to **contains**.
3. Click **+ add search term**.
4. For the second search term, enter your last name in the field next to **contains** and change Any Part to **Owner**.
5. In the **Search Within** field, select **This Site Only**.
6. Select the **Maximum Results** and the **Sort Results**.
7. For Object Types to Search, select **Limit search to selected object types** and click **Document**.
8. Click the **Search** button.
The search results display.

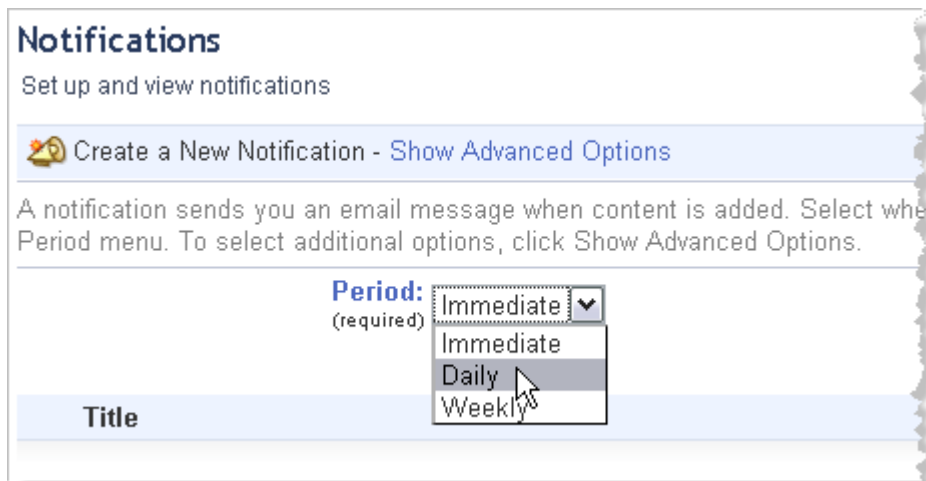
Receiving notification of new or changed content

Notifications allow you to receive an email message when a change occurs to an object. You can add a notification for any site object. 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.

1. Locate the object for which you want to add a notification.
2. Click the object's **Notifications** icon.



3. On the Notifications page, click **Create a New Notification**.
4. From the **Period** menu, select a notification time period.



5. Click **Apply**.

Creating a Simple Workflow Using Document Routing

Content can be easily distributed for approval and review using DocuShare's document routing and workflow features. Running on top of a true workflow application (some systems use a simple messaging subsystem), the routing and workflow features provide significant scalability. For maximum flexibility and user friendliness, DocuShare provides full control to users enabling them to create, share, and manage Routing Slips.

When creating a Routing Slip for a document or one of its versions, 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 test the routing and workflow features, it is recommended you create several “dummy” user accounts so you can originate and receive a routing task.

Routing a document

1. Click the Route command from a document's **More Actions** menu. (The **Route** command is not available if the document is locked.)

A Routing Slip appears.

Routing Slip Setup

A Routing Slip can consist of one or more routing steps. To begin adding step 1, either select a saved Routing Slip or create a new Routing Slip by choosing a routing action and entering a message.

Document(s) to Route:

DocuShare & DocuShare CPX Product Features

Use a saved Routing Slip

My saved Routing Slips ...

[View all saved Routing Slips](#)

Create a new Routing Slip

Routing Action

<input checked="" type="radio"/> Approve or Disapprove	<input type="text" value="At the Same Time - All Reply"/>
<input type="radio"/> Review and Make Changes	<input type="text" value="At the Same Time - All Reply"/>
<input type="checkbox"/> Share Changes with Recipients	
<input type="radio"/> Acknowledge Receipt	<input type="text" value="At the Same Time - All Reply"/>
<input type="radio"/> Information	

Routing Message

2. Under **Routing Action**, choose one of the following:
 - **Approve or Disapprove**—Requires users to approve or not approve the document.
 - **Review and Make Changes**—Allows users to provide comments and a revised version of the document. Click **Share Changes with Recipients** if you want each recipient to see the previous recipient's changes.
 - **Acknowledge Receipt**—Provides the document to users for information and requires the users to confirm receiving the document.
 - **Information**—Provides the document to users for information only.

3. Depending on the routing action you selected, choose one of the following **Routing Orders**:
 - **In Order**—Routes the document to users in the order in which they are listed in the Selected Users/Groups field. If a user does not approve the document, it is not routed to subsequent users.
 - **At the Same Time-Single Reply**—Routes the document to all users simultaneously and only one user's reply is needed to complete the routing task.
 - **At the Same Time-All Reply**—Routes the document to all users simultaneously and all users must reply to complete the routing task.
 - **At the Same Time-Majority Reply**—Routes the document to all users simultaneously and more than half of the users must reply to complete the routing task.
4. Under **Message**, enter a **Subject** and a message in the **Comments** field.
5. Click **Next** to go to the Add Recipients page.
6. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.

Add Recipients

Select the users and groups to whom the document should be routed.

Show: Users Groups Both

Search:

Possible Users/Groups:

Selected Users/Groups:

7. Do one of the following:
 - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
 - To display your favorite accounts, click **Show Favorites**.
8. 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).
9. In the **Selected Users/Groups** field, select any accounts that you want to remove from the list of recipients and click the **Remove** button.
10. 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.
11. 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**.
12. Click **Next** to go to the Choose Escalation and Notification page.
13. Under **Escalation**, choose any of the following:
 - **If Not Complete**—Specifies a completion date for the routing task.
 - **Then Escalate**—Specifies an escalation action if the routing task is not complete by the specified date.
14. 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, you click the **My Tasks** link on the navigation bar and select **Tasks Assigned to Me**.

Choose Escalation and Notification

During the routing process, choose the escalation action and type of notification to receive in My Tasks.

→ **Escalation**

If Not Complete:

By

Within or Days

Then Escalate:

→ **Notification**

Notify me

Of Escalation

Of Task Progress

When Task Is Complete

Click **Done** to review and finish the current step (Step 1)

15. Click **Done** to go to the Routing Summary page.

16. Review the routing information for the task and then do one of the following:

- Click **Submit** to start the routing task.
- Click **Back** to change any of the routing information.
- Click **Add Step** to add another step to the routing task.


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

Viewing and responding to your tasks

To view the tasks assigned to you, you can click the **My Tasks** link on the DocuShare navigation bar or click **My DocuShare**. You also can receive an email message with a URL to the task.

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

A window appears displaying your task with a link to the document.



The screenshot shows the Xerox DocuShare CPX interface. At the top, the user is identified as 'hsantos'. The main heading is 'For Your Approval'. Below this, the task details are shown: 'From: Morgan, Cathy', 'Subject: DocuShare & DocuShare CPX Product Features', and 'Date: Friday, April 3, 2009 03:19:42 PM PDT'. A table lists the document with columns for 'Type', 'Title', and 'Actions'. The document title is 'DocuShare & DocuShare CPX Product Features' and it has a 'Properties' icon in the actions column. Below the table, there is a link for 'Latest published version'. A 'Comments' section contains a text input field and a 'Save as private' checkbox. At the bottom, there are three buttons: 'Approved', 'Disapproved', and 'Respond Later'. The footer contains the copyright notice: 'Copyright © 1996-2008 Xerox Corporation. All Rights Reserved.'

3. Click the document title to open the document.

If the document was sent to you for review, you can edit it and attach a draft version by clicking the **Properties** icon that appears to the right of the document.
4. Close the document.
5. Enter a message in the **Comments** field and click the appropriate button at the bottom of the window to complete the task.

Creating a More Complex Workflow Using Content Rules (CPX Only)

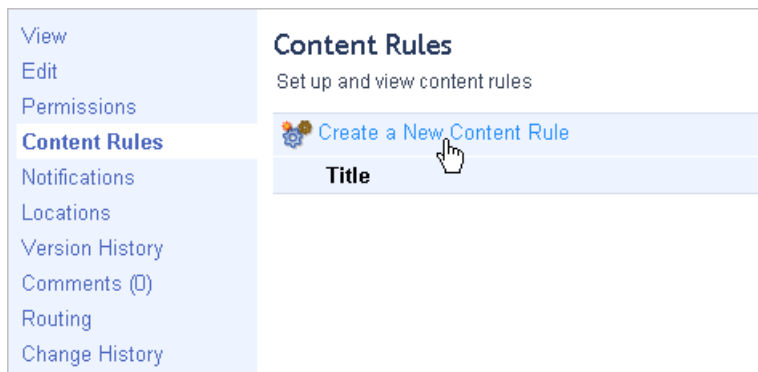
DocuShare CPX content rules go beyond basic document routing capabilities, enabling business users to easily define and modify advanced, document-centric workflows. You create a content rule to have an action run automatically when an event occurs regarding specific content. For example, you can create a content rule for a document to copy it to another collection when a specific document property is changed. DocuShare provides a wizard to help you create a content rule.

Creating a content rule

1. Locate a document on the site.
2. From the document's **More Actions** menu, select **Content Rules**.



3. On the Content Rules page, click **Create a New Content Rule**.



4. Give the content rule a title and click **Next**.
5. From the **When** menu, select **Properties edited**. Then click **Next**.

- Under **Where the content property conditions apply**, select **Keywords** from the menu and type **published** in the box after contains. Then click **Next**.

Content Property Conditions
Define the content property conditions that apply to the event.

Where the content property conditions apply:

Keywords [v] Contains [v] published

+ add another condition

When date property conditions apply: (use the following date format: mm/dd/yyyy)

Date modified [v] Is after [v]

Cancel < Previous Next >

- From the **Action for Content Involved** menu, select **Copy (add location)**. Then click **Next**.

Action Performed
Select the action to perform when the event occurs. The action is performed on the content.

Action for Content Involved (choose only 1):

- Change owner
- Change properties
- Convert
- Copy (add location)**
- Delete
- Email content
- Email notification of event(s)
- Export document
- Lock
- Route document

Cancel < Previous Next >

- Under **Copy to location options**, click **Show All**.
- Select a collection and click **Next**.
- On the Completion Settings page, click **Done**.

A View Properties page appears, displaying a summary of the content rule.

To test the content rule, edit the document's **Keywords** property by adding the word **published**. Then go to the collection you specified in the content rule to see a copy of the document.

Note: More advanced workflows also can be created using the Workflow Studio, which is available on the DocuShare Developer Network.

Changing a content rule

After a content rule is created, you can easily change any of its settings. In this exercise you edit the content rule you just created.

1. From the document's **More Actions** menu, select **Content Rules**.
2. On the Content Rules page, click the content rule title.
3. On the View Properties page, click the **Edit** link.
4. Go through the Edit Content Rule pages and make the changes you want.

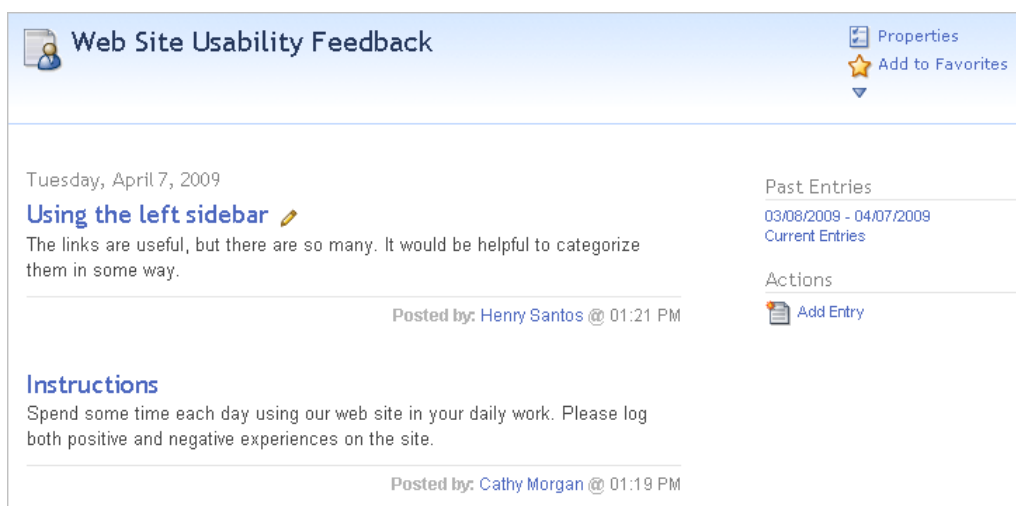
Using Social Collaboration Features

DocuShare social collaboration features include the ability to add weblogs (blogs) and wikis to your site and to add comments to documents. When adding a blog, you can choose to have it moderated, which requires entries to be approved before users can read them.

To format blog, wiki, and comment content, DocuShare provides a WYSIWYG editor. Additionally, an HTML designer can customize blogs and wikis using cascading style sheets.

Adding a blog

1. Open a workspace or a collection.
2. From the **Add** menu, select **Weblog**.
3. On the Add Weblog page, enter a title for the blog.
4. Change any of the default property values that control the formatting of the blog and the entries.
5. Click **Apply** to add the blog to the container.
6. Click the blog to open it.
7. Click the **Add Entry** link.
8. Create an entry by entering a title and a description (the body of the entry). Then click **Apply**.
9. You can post a comment on an entry by clicking the entry title and then clicking the **Add a comment** link.



The screenshot shows a weblog interface. At the top, there is a header bar with the title "Web Site Usability Feedback" and a user icon. To the right of the title are two links: "Properties" and "Add to Favorites". Below the header, the main content area is divided into two columns. The left column contains the date "Tuesday, April 7, 2009", a link "Using the left sidebar" with a pencil icon, and a paragraph of text: "The links are useful, but there are so many. It would be helpful to categorize them in some way." Below this is a line indicating it was "Posted by: Henry Santos @ 01:21 PM". The right column contains a "Past Entries" section with a date range "03/08/2009 - 04/07/2009" and a "Current Entries" section. Below these is an "Actions" section with a link "Add Entry" and a document icon. At the bottom of the main content area, there is another entry titled "Instructions" with the text "Spend some time each day using our web site in your daily work. Please log both positive and negative experiences on the site." and a line indicating it was "Posted by: Cathy Morgan @ 01:19 PM".

Adding a wiki

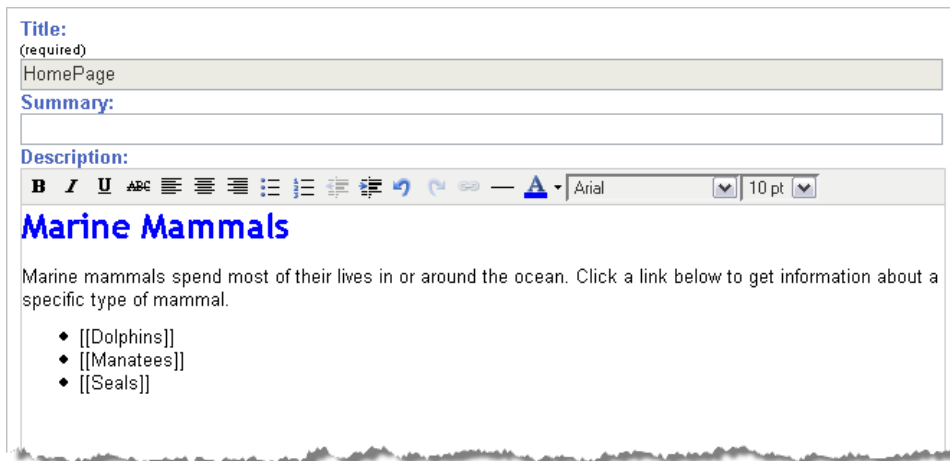
1. Open a workspace or a collection.
2. From the **Add** menu, select **Wiki**.
3. On the Add Wiki page, enter a title for the wiki.
4. Click **Apply**.

The wiki is added to the container.

5. Click the wiki to open it.

The Add WikiPage appears and the page is titled HomePage.

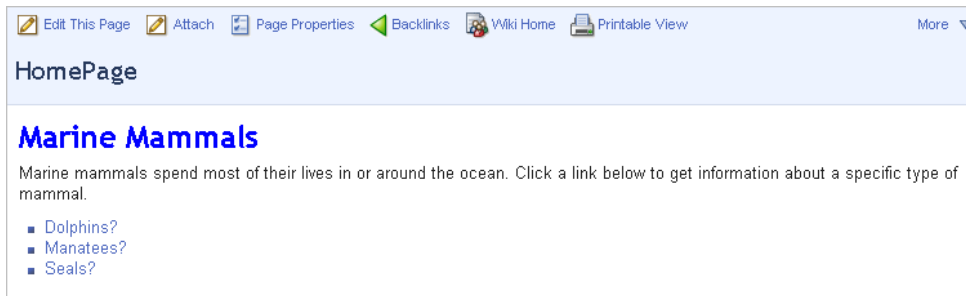
6. In the **Description** field, enter the page content using the WYSIWYG editor. To create a link to another page, enclose the page title within double square brackets.



The screenshot shows the 'Add Wiki' form. The 'Title' field is labeled '(required)' and contains 'HomePage'. The 'Summary' field is empty. The 'Description' field contains a WYSIWYG editor with the following content: a blue heading 'Marine Mammals', a paragraph 'Marine mammals spend most of their lives in or around the ocean. Click a link below to get information about a specific type of mammal.', and a bulleted list with three items: '[[Dolphins]]', '[[Manatees]]', and '[[Seals]]'. The editor toolbar shows various formatting options and a font set to Arial, 10 pt.

7. Click **Apply**.

The wiki page appears. Text followed by a question mark is a link to another wiki page.



The screenshot shows the resulting Wiki page. At the top, there is a navigation bar with links: 'Edit This Page', 'Attach', 'Page Properties', 'Backlinks', 'Wiki Home', and 'Printable View'. Below the navigation bar, the page title 'HomePage' is displayed. The main content area features a blue heading 'Marine Mammals', a paragraph 'Marine mammals spend most of their lives in or around the ocean. Click a link below to get information about a specific type of mammal.', and a bulleted list with three items: 'Dolphins?', 'Manatees?', and 'Seals?'. The question marks indicate that these are links to other wiki pages.

8. Click the text to add content to the linked page.
9. Enter content in the **Description** field and click **Apply**.

Adding a comment to a document

Comments allow you to quickly add information about a document.

1. Locate a document.
2. Click the **Comments** icon that appears to the right of the document's title.



3. On the Add Comments page, enter a title and a description (the comment text). Then click **Apply**.

The comment appears on the Comments page. On the Comments page, you can read and add more comments.



Using Workspaces for Project and Team Collaboration (CPX Only)

A DocuShare CPX workspace provides a shared area for project and team collaboration, allowing you and other workspace members to gather and manage shared content, access collaboration tools to facilitate your work, and communicate with each other. A workspace includes four areas called portlets:

- **Content portlet**—The area in which you add and manage shared content.
- **Shortcuts portlet**—Displays links to frequently used objects.
- **Calendars portlet**—A combination of the calendars in the content portlet.
- **Membership portlet**—Lists the users who are members of the workspace membership group. A presence detection feature enables you to see which other members are logged in. The user icon is grayed when the user is not logged in.

Xerox DocuShare® CPX Home | What's New | Users & Groups | Help
cmorgan Logout | My DocuShare | My Tasks Search In: This Workspace Advanced

Location: Home » Our Project Home Page

Our Project Home Page

Our workspace for product design

Properties
Add to Favorites
Meet Online...

Content

Show All Types Go Add Calendar Go

View 1 - 5 of 5

Type	Title	Owner	Edited	Size	Actions
Folder	Meetings for Our Project	cmorgan	04/03/09	0	[Icons]
Calendar	Our Project Workspace Calendar	cmorgan	04/03/09	2	[Icons]
Document	Product Design	hsantos	04/03/09	0	[Icons]
Folder	Project Resources	cmorgan	04/03/09	2	[Icons]
Folder	Usability Testing	hsantos	04/03/09	0	[Icons]

Shortcuts

Show All Types Go

View 1 - 3 of 3

- Config Manager Design
- Product Specs
- Project Discussion

Calendar

Show All Calendars Go

April 5, 2009 - April 11, 2009

Date	Event	Owner
April 5, 2009		
April 6, 2009	01:00 PM - 02:00 PM Team Meeting	cmorgan
April 7, 2009		
April 8, 2009	02:00 PM - 04:00 PM Design Workshop	hsantos
April 9, 2009		
April 10, 2009		
April 11, 2009		

Membership

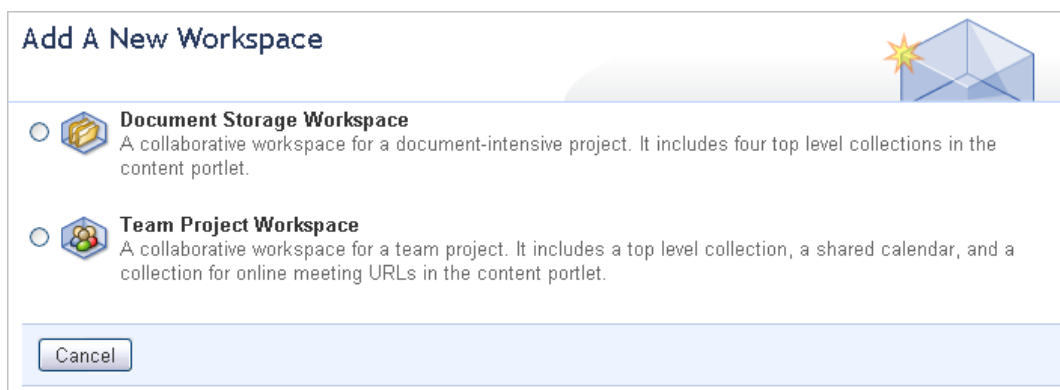
View 1 - 4 of 4

- Morgan, Cathy^{CPX}
- Reed, Lily^{read-only}
- Santos, Henry^{CPX}
- Smith, Donna^{DS}

Adding a workspace

Administrators can add top-level workspaces, in which users can add other workspaces. In addition, users can add workspaces to their personal home page, **My DocuShare**.

1. Go to the DocuShare home page.
2. In the **Communities** area, click **more** under **Workspaces**.
3. On the Workspace Directory page, click **Add a Workspace**.
4. On the Add a New Workspace page, you can choose from two types of workspaces. Select the workspace you want to add and click **Next**.



5. In the **Title** field, enter a name for the workspace.
6. Optionally, add a description and decide whether or not you want to add the workspace to your favorites on My DocuShare.
7. Click **Done**.

The workspace home page appears. You are listed as the workspace's first member in the membership portlet.

Assigning workspace members

1. On the workspace home page, click the **Membership** heading.
2. At the bottom of the page, click the **Change Membership** link.
3. In the **Search** field, enter part of the username of the second user account you created; then click **Go**.
4. In the **Possible Users/Groups** field, select the account to add to the group and click the **Add** button.
5. Click **Update**. The Members page appears and lists the user you added.

Managing Document Versions and Tracking Changes

DocuShare provides a rich set of document management features allowing you to collaborate on document content by adding new versions, edit the properties (metadata) associated with documents, and track all changes to documents.

Document collaboration features include document check out and locking, which ensures that only one user at a time edits a document, and version management.

Adding a new document version

1. Locate a document.
2. Click the **Upload a New Version** icon that appears to the right of a document's title.



3. On the Add Version page, click the **Browse** button.

A screenshot of the 'Add Version' form. The form has a light blue header with the title 'Add Version'. Below the header, there are three input fields: 'Filename: (required)' with a 'Browse...' button, 'Title: (required)' with the text 'Product Overview', and 'Version Comments:'. At the bottom of the form is an 'Apply' button.

4. Navigate to the location on your local drive that contains the document you want to add as a new version, select it, and click **Open**.

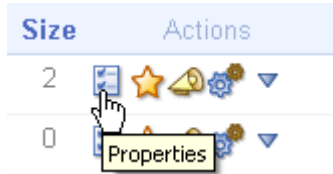
The path to the document appears in the **Filename** field.

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 a comment in the **Version Comments** field.
7. Click **Apply**.

Viewing a document's version history

The Version History page shows all saved versions of a document. By default, DocuShare saves four versions of a document. However, on a per-document basis, you can change the maximum number of versions to save.

1. Click the document's **Properties** icon.



2. Click the **View History** link.

The page displays all saved versions of the document.

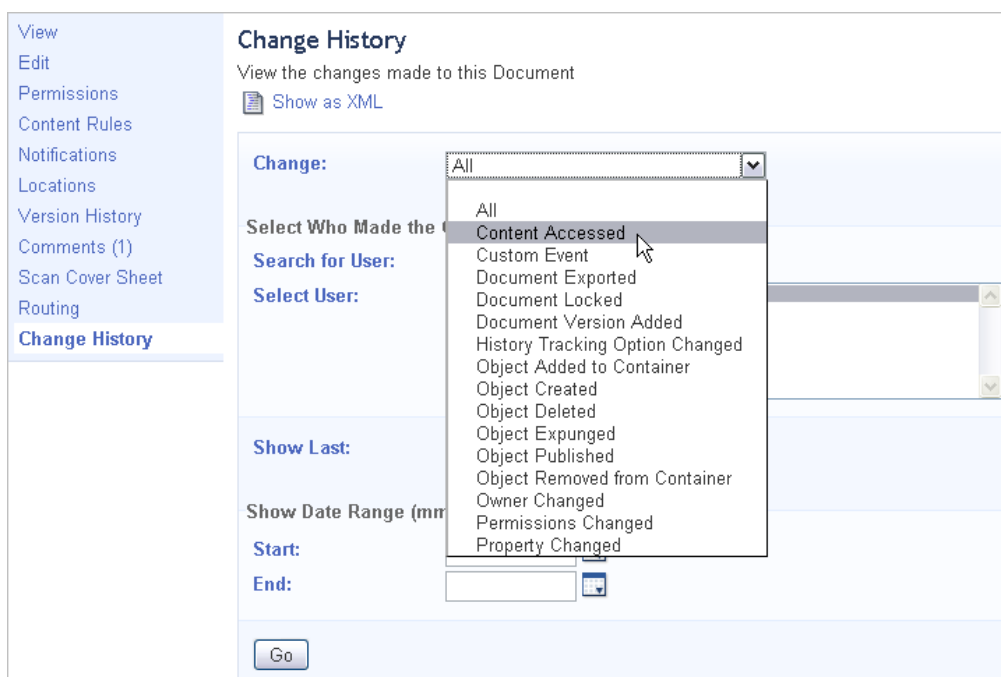
A screenshot of the 'Version History' page for a document titled 'Customer Survey'. The page shows a table with columns: Preferred Type, #, Version, Owner, Created, and Size. There are three versions listed. The first version is the preferred version, marked with a green circle. The second version is marked with a red circle. The third version is marked with a blue circle. The table also includes icons for each version. Below the table are two buttons: 'Change Preferred Version' and 'Show Renditions'. On the right side of the page, there are three action links: 'Check Out', 'Upload a New Version', and 'Delete Document'. On the left side, there is a navigation menu with links for 'View', 'Edit', 'Permissions', 'Content Rules', 'Notifications', 'Locations', 'Version History', 'Comments (0)', 'Routing', and 'Change History'.

3. To view a specific version of the document, click its type or version number.
4. 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.

Viewing a document's change history

DocuShare tracks all changes to site objects, which provides a history of the changes to objects. You can view the changes to any object to which you have Reader permission.

1. Locate the document whose change history you want to view.
2. Click the document'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.

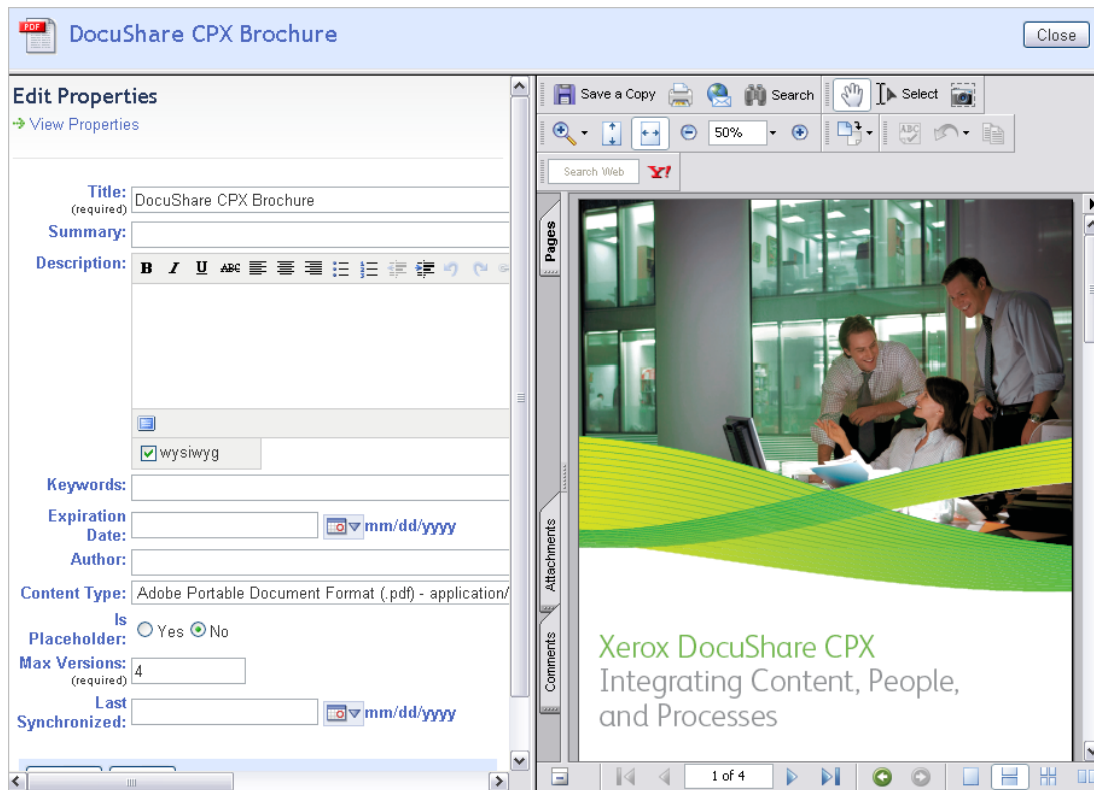


5. Do one of the following:
 - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
 - Click Show All and then choose the user from the Select User menu.
 - Choose All from the Select User menu.
6. From the **Show Last** menu, select the number 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.

Viewing a document and its properties

DocuShare provides you with a side-by-side view of a document's content and properties. Additionally, you can edit a document's properties in this view.



Exporting Documents (CPX Only)

An administrator sets up locations on external servers to which you can export documents. You can export any documents that you want to make available to users and applications outside the firewall.

Exporting a document

1. Locate the document or documents that you want to export.
2. Click the checkbox that appears next to each 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.

Confirm Export Document

Type Title

Acme Company Profile

Figure It Company Profile

WriteRight Company Profile

Location:

East Coast

West Coast

Confirm Cancel

Searching Multiple DocuShare Repositories

DocuShare supports a federated environment, which enables a site to link to a community of DocuShare sites. This feature allows users to search multiple DocuShare sites and share content among users of the member sites. It is very easy for an administrator to connect many DocuShare servers, so that different workgroups within a company can make their content widely available to all.

A DocuShare administrator creates a federation and invites other DocuShare sites to join. Each member site is managed by an administrator, who can cancel the membership at any time. Site users can map a federated site and, if allowed, create an account on a federated site. Once mapped to member sites, a user can search for and access content across the federation.



The screenshot shows the user interface for a DocuShare administrator. At the top, the user is identified as "Morgan, Cathy^{DS}". To the right of the name are two links: "Add to Favorites" (with a star icon) and "Delete This User" (with a trash icon). Below the header is a navigation menu on the left with options: View, Edit, Change Password, Change Username, Change Domain, Notifications, Scan Cover Sheet, and Federation Settings (which is highlighted). The main content area is titled "Federation Settings" and contains a "Server User Name Mapping Table". The table has two columns: "Federated Server Name" and "Mapped Username". There is one row of data: "DocuShare Venetian" (with a small server icon and the text "Member on venetian" below it) in the first column, and "cmorgan" in the second column. To the right of the "Mapped Username" cell is a link "Edit Mapping...".

Federated Server Name	Mapped Username
 DocuShare Venetian Member on venetian	cmorgan Edit Mapping...

DocuShare Client Tests

Xerox DocuShare Client seamlessly integrates DocuShare's content management features within the Microsoft Windows environment. This allows users to access DocuShare features using familiar Windows interfaces and applications such as Explorer, Office, and Outlook.

Key features

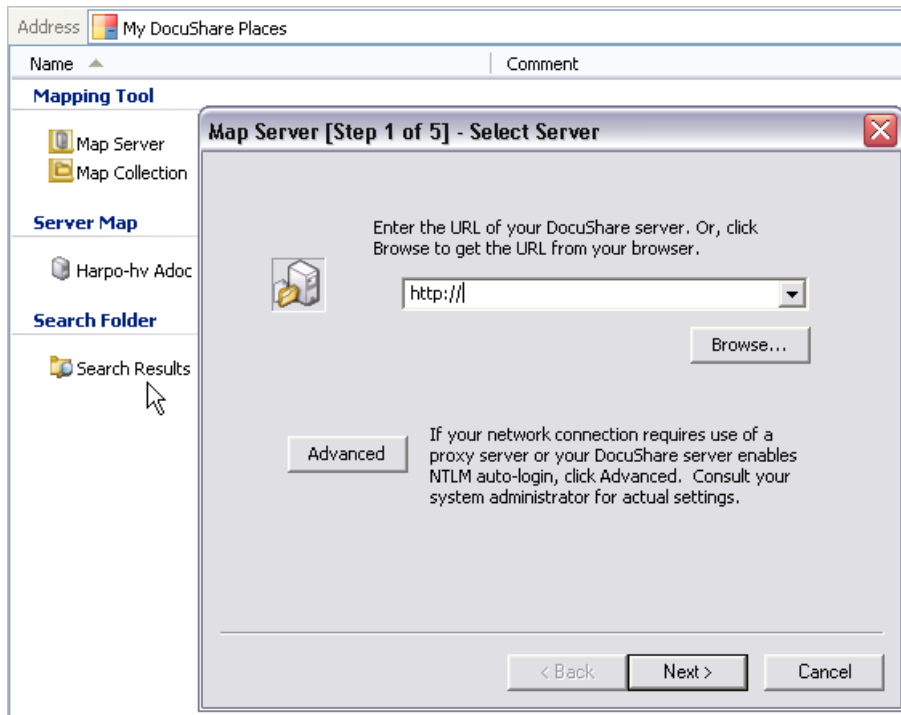
- Mapped DocuShare servers and collections appear in Windows Explorer and Outlook
- Ability to drag and drop documents and folders from local and network drives to DocuShare
- Ability to drag and drop email messages and attachments from Outlook to DocuShare
- Document check-out/check-in
- Integration with Office applications
- Search capabilities

Note: DocuShare also provides a WebDAV integration feature that enables users to access DocuShare content on computers with operating systems that support WebDAV. No client software is required.

Mapping a DocuShare server

DocuShare Client provides a wizard to guide you in mapping a DocuShare server.

1. Open **My DocuShare Places**. Depending on your installation, it appears either on your Windows Desktop or in My Computer.
2. Double-click **Map Server**.



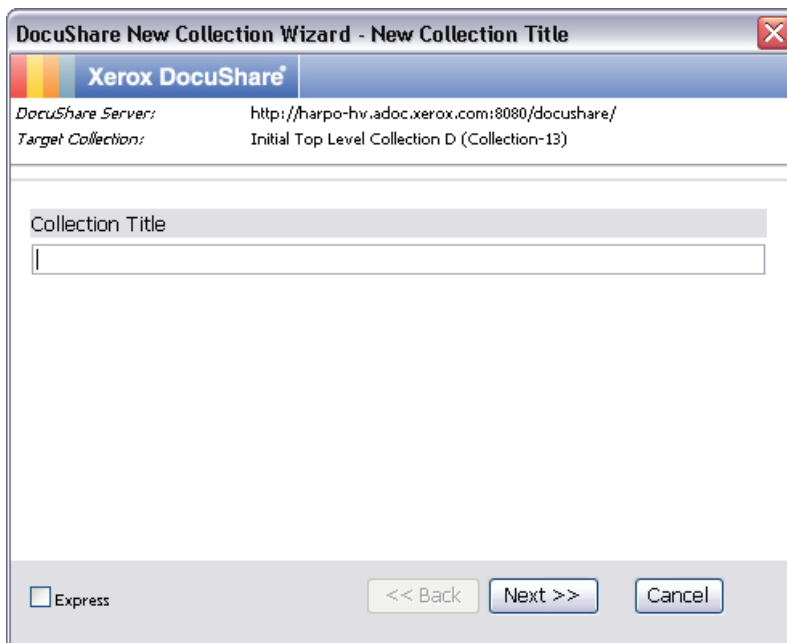
3. Follow the steps in the Map Server wizard to map a DocuShare server.
4. The mapped server appears in My DocuShare Places and in Microsoft Outlook's Folder List.

Adding content

Adding content to DocuShare using the Client is easy. You can use wizards to create new DocuShare objects, such as collections, documents, and URLs, and drag and drop files and folders from your file system to DocuShare.

Adding a collection

1. Double-click the server to open it.
The top-level site content and your personal collection appear.
2. Double-click a collection.
3. In the collection, right-click your mouse and select **Collection** from the **New** menu.
4. Follow the steps in the DocuShare New Collection wizard to add a collection.



Adding a document from your file system

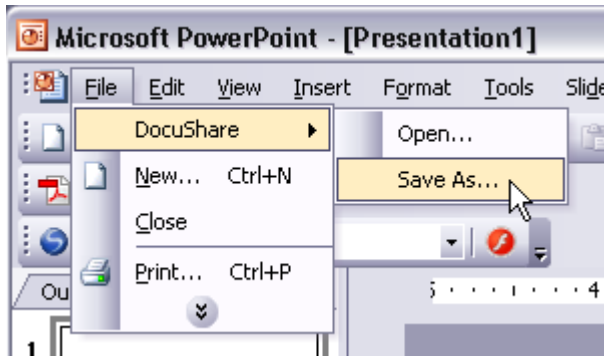
1. Open My Computer.
2. Select one or more files and drag and drop them into your collection.

Adding a folder with files from your file system

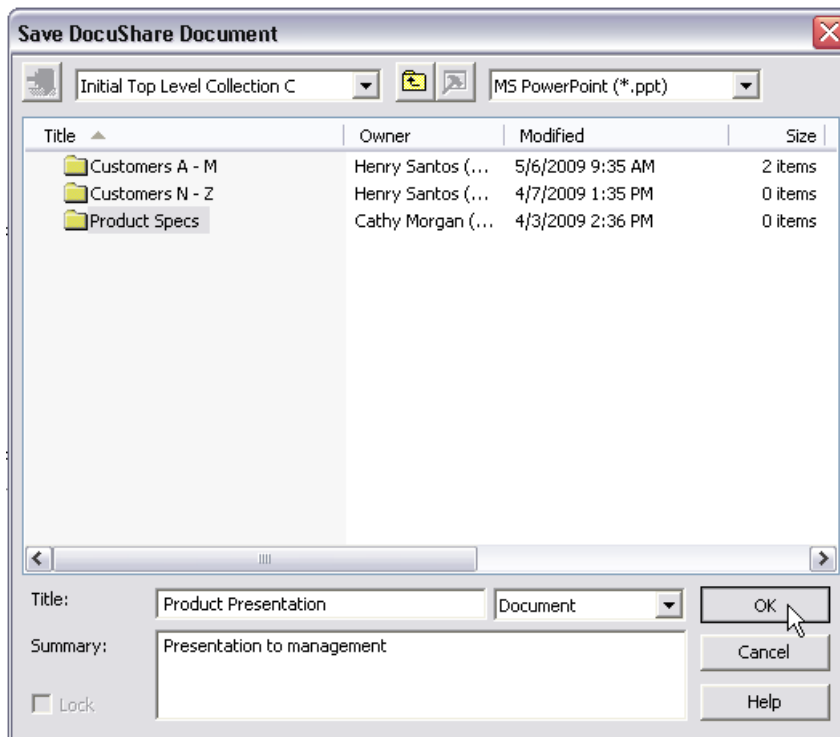
1. Open My Computer.
2. Select a folder that contains files and drag and drop the folder into your collection.

Adding a document from a Microsoft Office application

1. Open a document in an Office application.
2. From the application's **File** menu, select **DocuShare** and then **Save As**. (If you are using Office 2007, click the **Office Button** and select **Save to DocuShare**.)

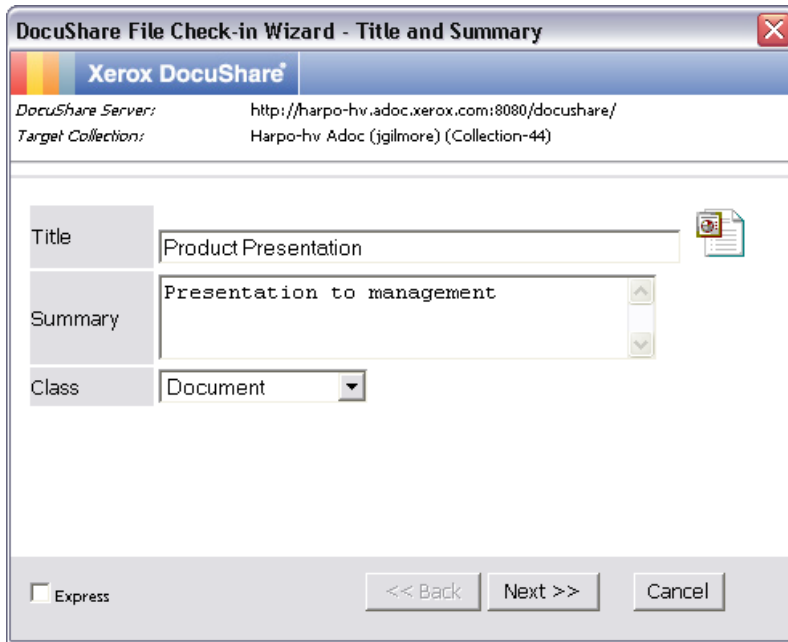


3. In the Save DocuShare Document window, navigate to and select the collection in which you want to save the document.
4. In the **Title** box, enter a document title.
5. In the **Summary** box, enter an optional summary of the document.
6. Click **OK**.



DocuShare has established a link between the document that is open and the collection, but has not checked in the document yet.

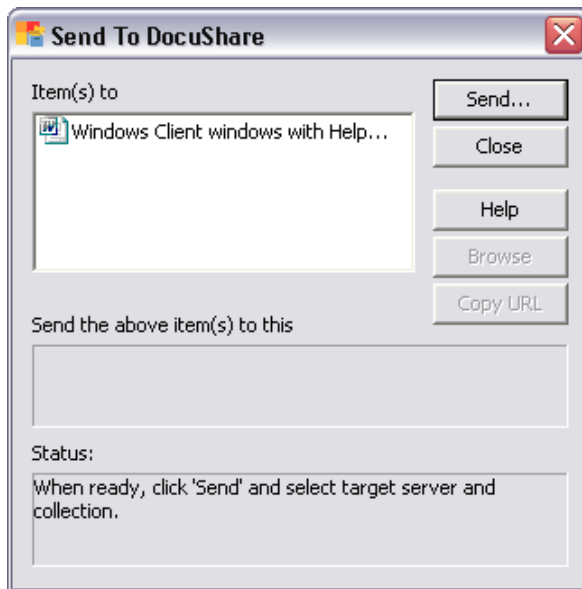
7. To check in the document (save it as a new version) select Close from the File menu. The DocuShare Checkin wizard opens.



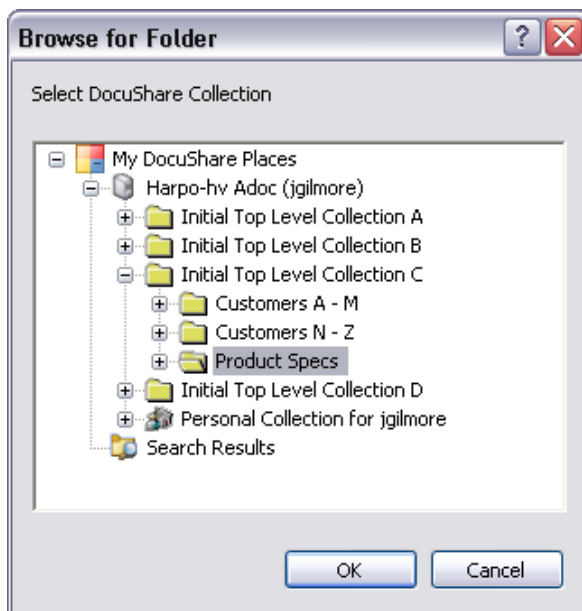
8. Follow the steps in the DocuShare Checkin wizard to add the document.

Sending a document from a Windows desktop folder

1. Open My Computer.
2. Open a folder and right-click the document that you want to send.
3. From the menu, select **Send To** and then click **DocuShare**.
4. In the Send To DocuShare window, click **Send**.



5. In the Browse for Folder window, navigate to and select the collection to which you want to send the document and click **OK**.



6. In the Send To DocuShare window, the Status area displays Done when the document is sent.
7. Click **Close** to close the Send To window.

Adding an email message with an attachment using DocuShare Client Outlook integration

Using DocuShare Client's Outlook integration feature, you can easily drag and drop email messages to collections. When adding an email message to a collection, the message and attachment are indexed separately, enabling you to search for each object.

DocuShare users without Outlook can read email messages that were dragged from Outlook to DocuShare using their Web browser or DocuShare Client.

1. Open Outlook.
2. In Outlook's Folder List, open your DocuShare server and navigate to your collection.
3. In an Outlook email folder, select an email message that includes an attachment.
4. Drag and drop the message into your collection.

Accessing content

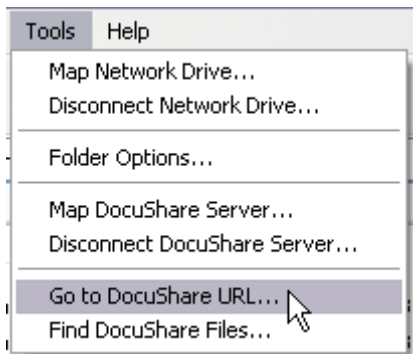
Accessing content from a collection

1. Double-click your collection to open it.
2. Double-click one of your documents to launch the editor application and open the document. DocuShare may lock the document when you double-click it, depending on how you have the configured DocuShare Client properties.
3. Close the editor when you are finished.

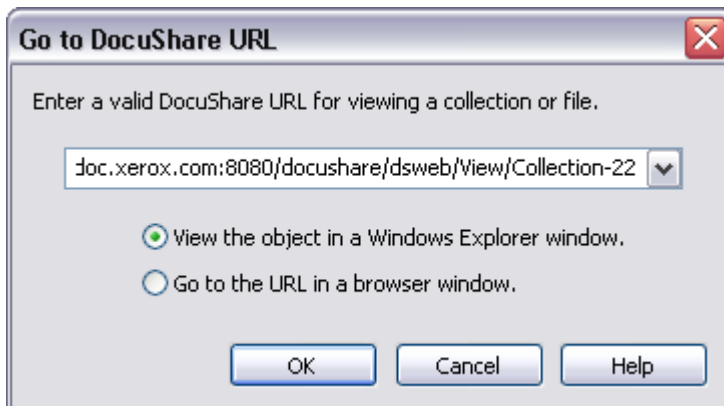
Accessing content directly from a URL

If you are given the URL to a collection, you can access the collection from My DocuShare Places.

1. In your browser, go to a DocuShare server and open a collection.
2. Copy the collection's URL from the **Address** or **Location** field.
3. In My DocuShare Places, select **Go to DocuShare URL** from the **Tools** menu.



4. In the Go to DocuShare URL window, paste your URL in the field.



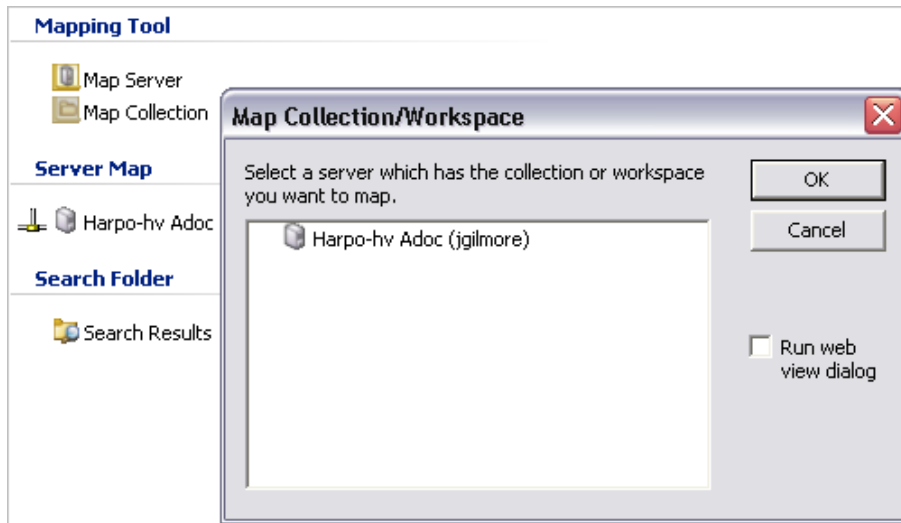
5. Click **OK**.

The collection opens in My DocuShare Places.

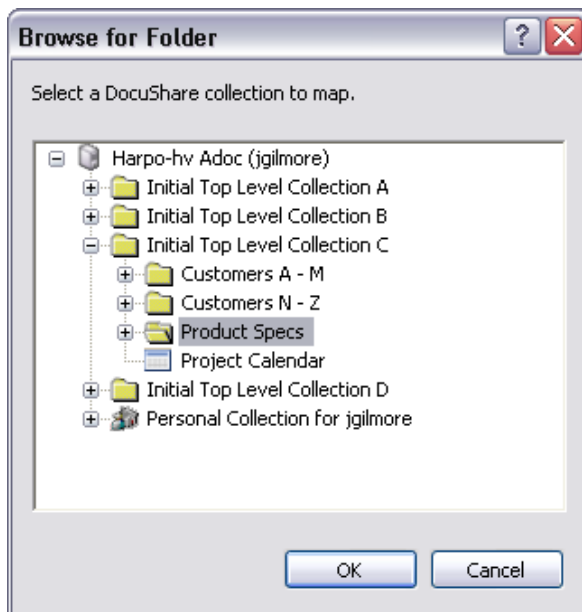
Creating a shortcut to a collection

If you frequently use a specific collection, you can map it to My DocuShare Places. To map a collection, the server on which the collection is located must be mapped.

1. In My DocuShare Places, double-click **Map Collection**.
2. In the Map Collection window, select the server that contains your collection and click **OK**.



3. In the Browse for Folder window, navigate to and select the collection. Click **OK**.

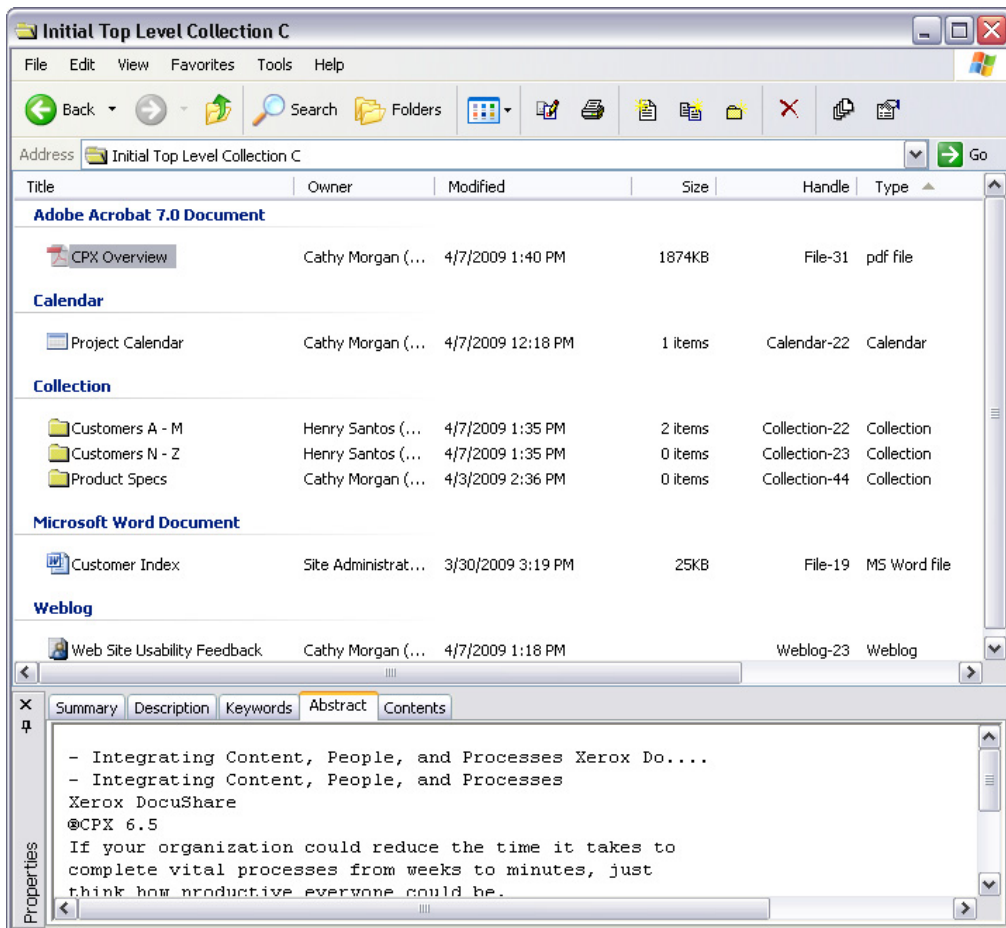


The collection appears in the server list.

Changing content properties

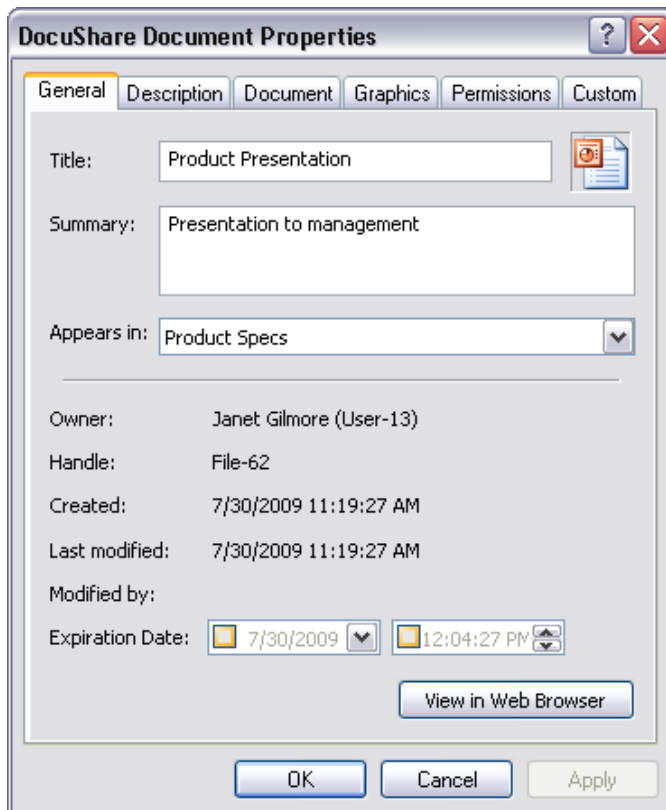
DocuShare Client features allow you to easily change content properties and access permissions. Additionally, it provides a unique Properties subwindow that shows information on object properties and, if the object is a document, a rendition of it, as shown below.

Note: If the Properties subwindow is not displayed, press the SHIFT key and click the View Properties button on the toolbar.



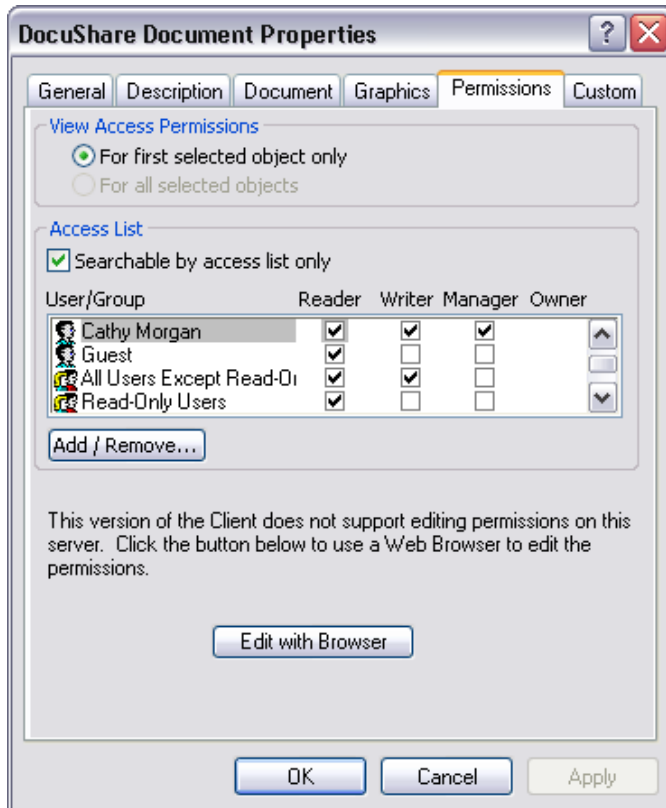
Changing an object's properties

1. Navigate to and open a collection.
2. Right-click a document and select **Properties**.
3. Change any of the document's properties by entering values in the tabbed Properties window.



Changing access rights

1. Right-click a file or collection and then click **Properties**.
2. Click the **Permissions** tab.
3. The Access List shows the users and groups who have access to the object.



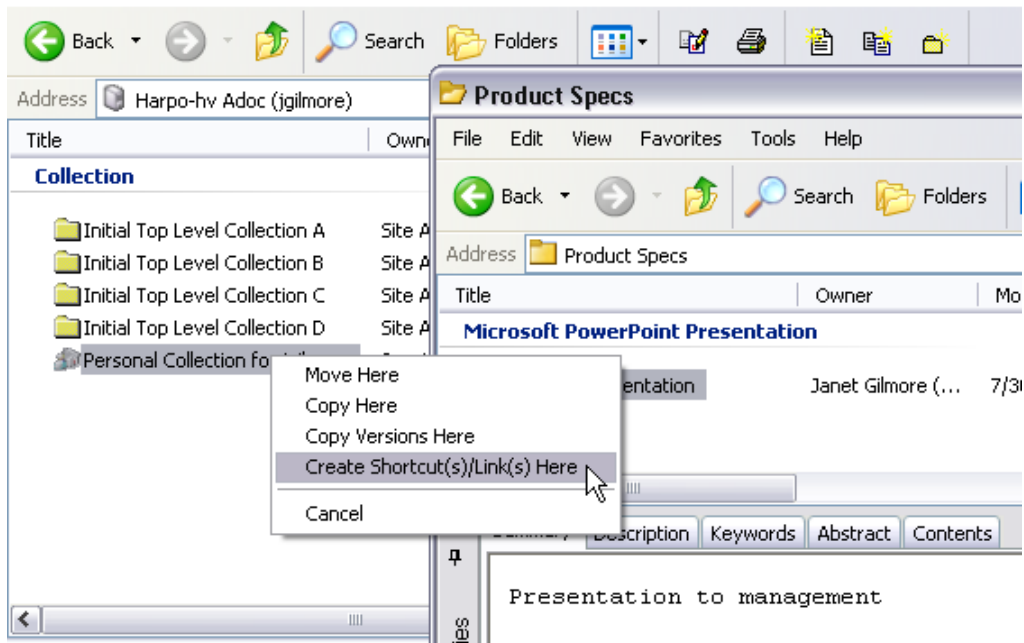
4. Click the **Edit with Browser** button to change the Access List.
5. On the Permissions page, click the checkboxes next to the user or group whose permissions you want to change; then click **Apply**.
6. Click **OK**.

Changing content location

In addition to using drag and drop to copy and move objects between collections, you can drag and drop an object and create a shortcut link to it. After creating a shortcut link, although the object appears in more than one collection, it is stored in the DocuShare database as a single object. Therefore, when you make any kind of change to the object, all instances of the object are changed. This enables users to more easily manage content that appears in several locations. DocuShare's handling of object shortcuts is significantly more robust than Windows Explorer standard shortcut features.

Before you begin, open a second My DocuShare Places window or display the Folders list.

1. Right-click a document and then click **Properties**.
2. Note the document's handle number (e.g. File-123) and click **Cancel**.
3. Right-click the document and drag it to another collection.
4. From the menu, select **Create Shortcut(s)/Link(s) Here**.

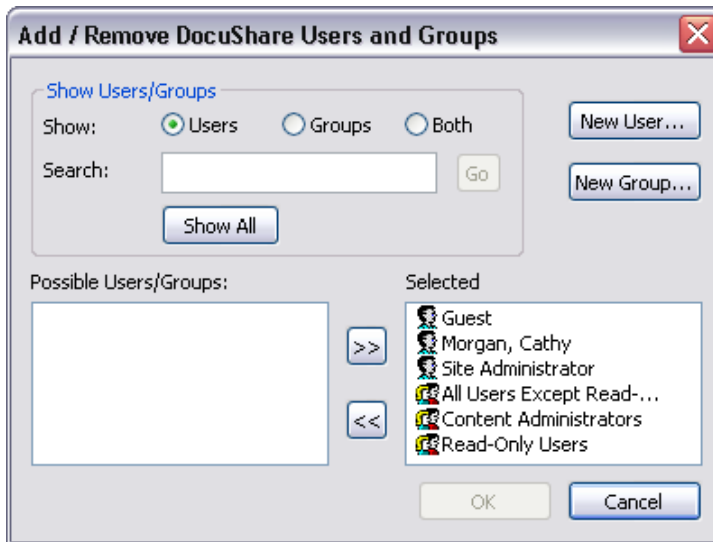


5. Open the collection to which you dragged the document. The document appears in the collection.
6. Right-click the document and then click **Properties**. Note that the document's handle number is the same as the original document's number.

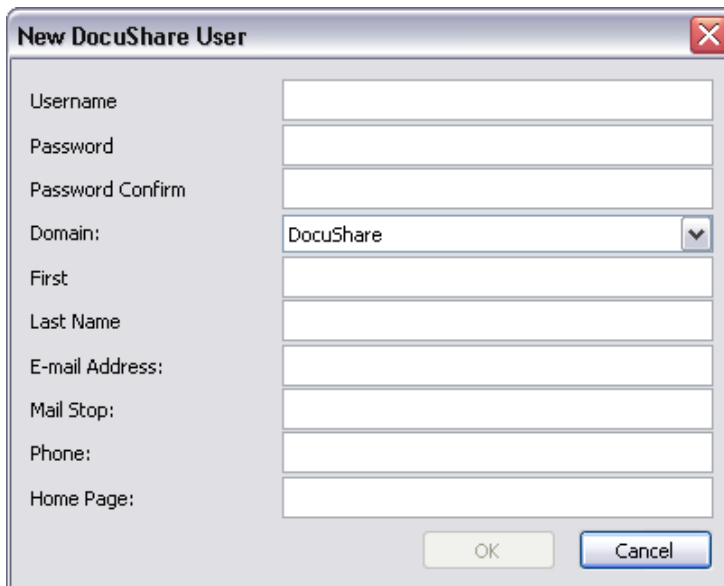
Creating user and group accounts

Among document and content management products, DocuShare is unique in the level of control it provides to users. For example, an administrator can configure a DocuShare site to allow users to create new user accounts for others. With this capability, users can effortlessly add content, create user accounts, and set permissions from a single Windows location.

1. Right-click an object and then click **Properties**.
2. Click the **Permissions** tab.
3. On the Permissions page, click the **Add/Remove** button.
4. Click **New User**.



5. Enter the user's account information in the required fields.



6. Click **OK**.
7. Click **New Group**.
8. Enter a title for the group.

The image shows a 'New DocuShare Group' dialog box. It has a title bar with a close button (X). The dialog contains the following fields and controls:

- Title:** A text input field.
- Summary:** A text input field.
- Description:** A text input field.
- Keywords:** A text input field.
- Domain:** A dropdown menu currently showing 'DocuShare'.
- Members:** A list box containing the following users: 'Guest', 'Morgan, Cathy', 'Reed, Lily', 'Santos, Henry', and 'Site Administrator'. There are up and down arrow buttons on the right side of the list.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

9. In the **Members** box, select the users you want to include in the group.
10. Click **OK**.
11. In the Add/Remove DocuShare Users and Groups window, click **OK**.

The user and group appear in the object's access list.

Setup and Software Installation

DocuShare 6.5 / DocuShare CPX 6.5 Minimum Requirements

Note: These are MINIMUM configurations required to run DocuShare. It is recommended that the server hardware configuration be sized based on expected network traffic, number of concurrent users, and volume of data.

Intel or AMD Platforms

- Windows 2003 Server R2 or SP2 Standard and Enterprise (32- and 64-bit)
- Windows 2008 Server Standard and Enterprise (32- and 64-bit)
- Red Hat Enterprise Linux ES 5 (32- and 64-bit)
- 3.0 GHz Intel Pentium 4 or AMD Athlon MP processor or better
- 3 GB RAM or higher (32-bit) / 4 GB RAM or higher (64-bit)
- 20 GB of free disk space
- Ethernet network interface

Sun SPARC Platform

- Solaris 10 with current patch clusters
- UltraSPARC III processor or better
- 4 GB RAM or higher (64-bit)
- 20 GB of free disk space
- Ethernet network interface

Virtual Server

- VMware ESX Server

Web Browsers

- Microsoft Internet Explorer 6 SP1 or 7

- Mozilla Firefox 2.0 or 3.0
- Opera 9.0
- Apple Safari 2.0 or 3.0

WebDAV

- Windows XP Professional with Office XP/2003/2007
- Apple Mac OS X 10.5

Web Servers

- IIS 6 on Windows 2003 Server
- IIS 7 on Windows 2008 Server
- SunONE/Sun Java System Web Server 6.1 on Solaris 10
- Apache Web Server 2.2.9

Databases

- IBM DB2 9.5
- Microsoft SQL Server 2005 SP3
- Microsoft SQL Server 2005 Express Edition
- Oracle 10.2.0.x or 11
- PostgreSQL 8.3.5

LDAP

- SunONE/Sun Java Directory Server 5.2 or 5.1 SP1
- Novell eDirectory version 8.7.3.7 or 8.8
- Microsoft Active Directory on Windows 2003 Server or Windows 2008 Server

DocuShare Client 6.0.6 System Requirements

- Microsoft Windows XP Professional with SP2; Microsoft Windows Vista (32-bit) with SP1 or the Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)
- Microsoft Office XP with SP3; Microsoft Office 2003 with SP3; Microsoft Office 2007
- Microsoft Outlook 2003 or 2007
- Microsoft Internet Explorer version 6 or higher

- TCP/IP network connection to a DocuShare or DocuShare CPX server running version 5.x or higher
- 256 MB RAM (minimum); 512 MB RAM (recommended)
- 50 MB free disk space for program files
- 64 MB (minimum) free disk space on the installation drive for work-in-progress files

Installation Overview

DocuShare 6.5/DocuShare CPX 6.5 is relatively simple to install and can be up and running in a few hours. Specific installation instructions are provided in the *Installation Guide* included with the DocuShare software. If additional guidance is required, please contact the Xerox technical contact provided in the *Contact Information* section of this document.

Installing and using the DocuShare Client with DocuShare can greatly enhance the user experience. Instructions for installation of the Client are provided on the DocuShare site **Help Desk** page.