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User Tutorial: Welcome

The User Tutorial consists of a series of exercises to help you quickly learn basic DocuShare features. To take advantage of the exercises, you should have DocuShare running in an open browser window.

Module 1: Interface features

Module 2: Creating accounts

Module 3: Adding content to your site

Module 4: Working with documents

Module 5: Setting up My DocuShare

Module 6: Using access permissions

Module 7: Searching for objects

Module 8: Using collaborative workspaces

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Key interface features

The intuitive interface of DocuShare enables users at any level to learn to use its features quickly. Key features include:

- Icons representing different types of content

- Action commands display task pages in one click

- Task pages with menus and options that are easy to use

- A navigation bar and footer on each page for quick access to product features

- A personal home page ("My DocuShare")

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Navigating your site

DocuShare provides the navigation features that enable you to easily move around your site and find what you need.

Navigation bar—Located at the top of each page, the navigation bar provides links to frequently used pages.

Breadcrumbs—Below the navigation bar, the breadcrumbs provide a hierarchical path back to the home page from your current location.

Page footer—Located at the bottom of each page, the footer includes additional useful links.

Search —Located at the top of each page, the search box enables you to find the content you need quickly. There is the capability of performing an advanced search using date ranges and other filters.

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Personal home page

DocuShare provides a personal home page, called **My DocuShare**, that you use to manage both private and site content. Your administrator may set My DocuShare to be the first page users see after logging into DocuShare. A link is always available on the navigation bar.

My DocuShare includes a personal collection in which you add private content, shortcuts to your favorite objects, a list of the groups you belong to, and more.

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Introduction

Your administrator determines who can access your site and create user and group accounts. As a **guest** (one who can access the site and view unrestricted content), you may be able to create a user account depending on the policy that is enabled. When individual users are able to create accounts, users can create accounts with their level of access or lower.

If site access and account creation are restricted, an administrator or someone with a user account will need to create a user account for you. To add objects and edit content, you must have a user account with DocuShare or CPX access.

The exercises in this module show you how to create a user account, create a group, log out and then log back in.

User levels

DocuShare enables sites to easily manage access to content and capabilities through user levels. This feature allows different types of users to access the same content, but only the functions needed for their job. One of the following user levels can be assigned to an account:

Read-Only—Allows the user to view content and manage personal content on My DocuShare.

DocuShare—All of the capability of a Read-Only account, plus those with the DocuShare user level can access all content management functions.

CPX—All of the capability of a DocuShare account, plus collaboration and process management features.

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Creating a user account

You will begin by creating a user account for yourself. You can create a user account if your site allows a guest or logged-in user to do so.

1. On the DocuShare footer, click **Users & Groups**.

   The Users and Groups Registry page appears. From this page you can create, list, and find users and groups.

2. Click the **Add User** link.

Creating a user account

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

   Username: The name you want to use to log into DocuShare.

   Password and **Password Confirm**: The password you want to use to log into DocuShare. Be sure to adhere to the rules listed in the Password rules box. Also, your password is case-sensitive.

   Domain: The organization or entity to which you belong.

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

   Last Name: Your last name.

   Email Address: Your email address.

Creating a user account

4. Enter any optional information. You can click a field name to get more information.

5. Click the **Apply** button.

   The Properties page for your user account appears, and your username displays in the upper right corner of the window indicating that you are logged in.

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Creating a group

By default, a logged-in user can create a group account. Groups enable you to assign access permissions to a group instead of to individual users.

1. On the footer, click **Users & Groups**.

2. On the Users & Groups Registry page, click the **Add Group** link.

3. In the **Title** field, enter a name for the group.

4. Select the correct **Domain** and **Spam Control** settings.

5. Enter any optional information. You can click a field name to get more information.

6. Click **Apply**.

Creating a group

7. In the **Search** field, enter part of the name of a user on your site and click **Go**.

   Note: You can also display your favorite users (module 5 explains how to add favorites).

8. In the **Possible Users/Groups** field, select the username and click the **Add** button.

9. Click the **Update** button.

   The group members display on the Members page. When you want to add and remove group members click **Change Membership**.

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Logging in and out

After creating your account in the first exercise, you were logged into DocuShare.

1. To log out, click the **Logout** link on the navigation bar.

2. To log into DocuShare, enter your username and password in the **Login** area.

   Remember, your password is case-sensitive.

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

4. Click **Login**.

Module 3: Adding content to your site

Introduction

You can add a variety of objects to your site, such as documents, calendars, wikis, weblogs, and URLs as well as any custom objects your administrator creates. Provided you have the appropriate write permission to the container, you can add objects to it.

The exercises in this module show you how to add a collection, a document, and a notification.

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Adding a collection

You store and manage objects in repositories called collections. As a logged-in user, you can add a collection to your site.

1. Click one of the top level collections to open it. On My DocuShare, the top level collections appear in the **Site Home** portlet.

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

    The Add Collection page appears.

3. In the **Title** field, enter a name for the collection.

4. Enter any optional information.

5. Click **Apply**.

    The collection is added to DocuShare.

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Adding a document

You can drag-and-drop documents to add them to collections.

1. Click the title of your collection to open it.

2. In your file system, navigate to the document you would like to add. Drag it to the open collection. Two rectangular areas display in the window.

    - If you would like to instantly upload the document without changing its properties, drop the document onto the area on the left.

    - If you would like to change the document properties before you upload, drop the document onto the area on the right. The **Enter Required Properties** window displays. Here you can give the document a title and enter some optional properties. Once you are done, click the **Add** button.

Module 3: Adding content to your site

Adding a notification

A notification allows you to receive an email message when a change occurs to a DocuShare object. You can add a notification for any object on your site. In this exercise, you will add a notification for your collection to receive an email message each time an object is added to it.

1. Click the ellipsis that appears to the right of your collection's title to display the **More Actions** menu.

2. Select **Notifications** .

3. On the Notifications page, click **Create a New Notification**.

Adding a notification

4. The **Period** menu specifies when DocuShare sends the email message. Keep it set to **Immediate**.

5. Click **Show Advanced Options**.

6. From the **Events of Interest** menu, select **Something added**.

Adding a notification

7. Click **Apply**.

    A description of the notification appears on the
    Notifications page. From this page, you can change the
    notification as well as delete it.

8. Go to your collection and add another document to it.

    In a few moments, you will receive an email notification.

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Introduction

You can easily browse the content of documents and collaborate with other users in creating documents. For document management, DocuShare provides document check out and version control features. Version control lets you maintain a specified number of document versions and a history of changes.

The exercises in this module show you how to browse and edit documents.

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Browsing a document

1. Navigate to and open your collection.

2. Open one of your documents by clicking its title.

3. If a window appears, choose the option to open the document.

4. To return to the collection, click the browser's **Back** button or close the document's window.

Note: Your browser's configuration determines whether a document opens in the browser window or in a separate application window.

Browsing a document

DocuShare provides conversion features that let you view supported document types in different formats.

5. Click the **View in HTML** 🔲 command from the **More Actions** menu (click the ellipsis to display the menu).

6. To return to the collection, click the browser's **Back** button.

7. Click the **View in PDF** 🔲 command from the **More Actions** menu (this action is available if your site is set up to use the feature).

Editing a document

When you check out a document for editing, DocuShare locks it to prevent other users from editing the document at the same time.

1. From the **More Actions** menu, click the document's **Check Out** command.

2. In the window that appears, choose the option to open the document.

3. Make some changes to the document.

Editing a 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. Close the document.

Editing a document

6. From the **More Actions** menu, click the document's **Upload a New Version** ⬆ icon.

7. On the Add Version page, 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 name of the document appears in the **Filename** field.

Editing a document

9. In the **Version Comments** field, enter a note about the changes you made.

    Keep **Unlock Document** set to **Yes**.

10. Click **Apply**.

    The View Properties page appears.

11. Click the **Version History** link to see both versions of your document.

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Module 5: Setting up My DocuShare

Introduction

My DocuShare provides a single page from which you can easily manage personal content (other users cannot access the page). Depending on how your site is set up, My DocuShare includes some or all of the following **portlets**:

- Personal Collection
- Workspaces
- Favorite Calendars
- Personal Trashcan
- Favorites
- My Groups
- Tasks
- Site Home (top level site contents)

The exercises in this module show you how to add favorites to My DocuShare and add objects to your personal collection.

Adding favorites to My DocuShare

You add favorites to My DocuShare to keep links to your frequently used objects in one location.

1. Navigate to and open your collection.

2. Select an object by clicking to the left of the object icon.

3. From the **Edit Selected** menu, click **Add to Favorites**.

Adding favorites to My DocuShare

4. In the confirmation window, click **Confirm**.

   You return to your collection.

5. On the navigation bar, click **My DocuShare**.

   A link to your document appears under **Favorites**.

6. Click the **Favorites** heading to display favorites in a collection listing. In this view, you can select and edit favorites, including remove favorites, using the **Edit Selected** menu.

Note: Another way to add an object to your favorites is by clicking the star that appears under Actions.

Using the Personal Collection

The Personal Collection on My DocuShare is a private collection to which other users do not have access. You can add any private objects to this collection.

1. On the navigation bar, click **My DocuShare**.

2. Click **Personal Collection** to open the collection.

3. Use the **Add** menu to add an object to the collection.

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Module 6: Using access permissions

To control who can view, change, and delete site objects, DocuShare provides permissions. Depending on how your site is set up, DocuShare provides either three or six types of permissions that you can assign to the users and groups in an object's access list. You are the owner of any object that you add to your site, which allows you to assign and change the object's permissions.

The exercises in this module explain how to add users to an access list, change permissions, and change an object's owner.

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Changing an object's permissions

1. Open your collection.

2. Click a document's **Permissions** 🔍 command from the **More Actions** menu.

   The Permissions page appears, which shows the document's access list. As the document's owner, your name appears in the access list with all permissions.

3. To add users and groups to the access list, click the **Change Access List** button.

   The Change Access List page appears.

Changing an object's permissions

4. For **Show**, select the **Groups** radio button.

5. In the **Search** field, enter part of the name of the group you created in module 2 and click **Go**.

6. In the **Possible Users/Groups** field, select the group name and click the **Add** button to add the group to the access list.

7. Click the **Update Access List** button.

   The Permissions page appears, displaying the group in the access list.

Changing an object's permissions

8. In the **Search Available To** field, choose who can view the object in a search:

   - **Anyone** allows guests and all users to view the object.

   - **Access List Only** allows only those accounts in the object's access list that have at least read permission to view the object.

9. In the **Access List**, select the permissions you want for the group.

   For a description of each permission, click the **Access List** field.

10. Click **Apply**.

Changing an object's owner

As the owner of an object, you can assign ownership to another user. An object's owner is shown when viewing the contents of collections, search results, and the object's properties.

1. On the Permissions page, click the **Change Owner** button.

   The Change Owner page appears.

Changing an object's owner

2. Use the **Search** field to find a user on your site.

3. Select the username from the **New Owner** field.

4. Click the **Update Owner** button.

   The new owner's name appears on the Permissions page with full permissions. You remain in the access list.

Introduction

DocuShare search features enable you to quickly find objects and content on your site. You can run simple word searches as well as advanced searches, should you need to narrow the results of a search.

The exercises in this module show you how to run a word search, run an advanced search, and save a search query.

Running a word search

Using the search area on the navigation bar, you can quickly search for objects and content.

1. In the **Search** field, enter a word from the title of the collection you added.

2. Click **Search**.

   The search results display.

*Note: When running a word search, you can click the small gear next to the **Search** field to display the Extended Search options.*

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Running an advanced search

On the Advanced Search page, you can combine search terms and search for specific objects and document types.

1. On the navigation bar, click **Advanced**.

2. Under **Search Text Contained In**, enter a word from your document's title in the box after **contains**.

3. Click **+ add search term**.

4. In the box after **contains**, enter your username.

5. From the menu after *In*, select **Owner**.

Running an advanced search

6. Under **Search Within**, select **The entire site**.

7. In the **Sort Results** field, select **By Title** to display the results in alphabetical order.

8. Under **Object Types to Search**, select **Limit search to selected object types** and then select **Document**.

9. Click **Search**.

   The search results will display.

Saving a search

On the Search Results page, you can save the query you used to run the search.

1. From the **Add** menu, select **SavedQuery**.

2. In the **Title** field, enter a name for the saved query.

3. To make the query easier to find, enter a summary and description of the query. You can also review the query settings and make any changes that may improve your results in the future.

4. At the bottom of the page, click **Save Search**.

   The Properties page for the saved query appears, so you can add it to a collection.

Saving a search

5. In the **Search** field, enter a word from the title of your collection and click **Go**.

6. In the **Possible Locations** field, select your collection and click the **Add** button. Your collection appears in the **Selected Locations** field.

7. Click the **Update Locations** button.

Saving a search

8. In the **Current Locations** field, click your collection.

   You can see your saved query in the collection.

9. Click the saved query to run the search again.

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Introduction

Note: This feature is only available for those with CPX user level access.

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.

The exercises in this module show you how to add a workspace and change its members.

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Adding a workspace

You can add a workspace to another workspace on your site, or you can add a workspace from the workspaces portlet on My DocuShare. In this exercise, you will add a workspace from My DocuShare.

1. On the navigation bar, click **My DocuShare**.

2. In the Workspaces portlet, click **Add a Workspace**.

   The Add a New Workspace wizard appears.

3. Select the **Team Project Workspace** and click **Next**.

Adding a workspace

4. In the **Title** field, enter a name for the workspace.

5. Click **Done**.

    The workspace home page appears. It includes four
    portlets: content, calendar, shortcuts, and membership.
    A collection for online meeting URLs, a calendar, and a
    top level workspace collection are added to the content
    portlet. In addition, a membership group is created for
    the workspace, with you as its initial member.

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Adding workspace members

As the user who added the workspace, you can add other users and groups to the membership group.

1. On the workspace home page, click the **Membership** portlet title.

2. On the Membership page, click **Change Membership**.

3. Search for a specific user on your site.

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

   If you like, you can search for and add more users.

Adding workspace members

5. Click **Update**.

   The Properties page for the group appears and lists the members. Each member is assigned full read and write permissions to the workspace. You can assign manage permission to individual group members on this page, or you can assign manage permission to the entire group.

6. To assign manage permission to the group, go to My DocuShare.

7. In the workspaces portlet, locate your workspace.

8. Click the **Properties** command ||| from the **More Actions** menu.

Adding workspace members

9. Click the **Permissions** link.

10. In the access list, click the manage checkbox for the group.

11. Click **Apply**.

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Where to go next

There are many DocuShare features that are not covered in this tutorial. The *DocuShare User Guide* fully describes all of DocuShare's capabilities. On the footer, click **Help** to display the Help Desk. Print the guide and review its contents.

Information about additional DocuShare training is available on the DocuShare web site.