



Enterprise Document Manager & Digital Locker

Training Guide for Users

Table of Contents

I: Access and Navigate the Web View.....	12
The Web View Layout	12
Main Menu	12
The Navigation Bar	13
Search.....	13
Toolbar Buttons.....	14
Document Manager Grid.....	15
Folder View Settings	15
Sorting Your Files and Folders	15
Footer	16
The Right-Click Menu	16
II: Manage your Files and Folders via the Web View	18
New Folder Wizard.....	18
Uploading a File or Folder	23
Basic Upload	24
Advanced Upload.....	25
Renaming a File or Folder.....	25
Moving a File or Folder.....	26
Move a single file or folder	26
Move multiple files or folders	26
Copying a File or Folder	27
Copy a single file or folder	27
Copy multiple files or folders.....	27
Deleting a File	28

Delete a single file or folder	28
Delete multiple files or folders.....	28
Permanently delete all files or folders within your Trash.....	28
Restore a deleted file or folder which exists in your Trash	28
Retrieve an overwritten file which exists in your Trash	29
Save to Zip File	29
Copy Link Location.....	29
Save to Desktop	29
Open (File) in Browser	29
Open (Folder).....	29
Content Type.....	29
Manage Summary	31
III: Manage your File and Folder Content.....	33
Comments	33
Comment a file or folder.....	33
Delete a single comment on a file or folder	33
Delete all comments on a file.....	34
Tags.....	34
Add a Tag on a file	34
Add a Tag for multiple files	34
Search by Tag.....	35
Delete a Tag on a file	35
Delete a Tag for multiple files	35
Logging.....	35
Default Logging	35

Turn Default logging on or off for a folder	36
Logging	36
Turn logging on or off or to view a history of file access.....	36
Versioning	36
Default Versioning.....	36
Turn default versioning on or off for a folder.....	37
Versioning	37
Turn Versioning on or off for a file	37
View an older version of a file	37
Regain an older version of a file	38
Checkout.....	38
Checkin	39
Uncheckout	39
Locking	39
Create a lock on a file	39
Create a lock on a folder	39
Create a recursive lock on a folder	40
View whom has locked a file or folder	40
Remove a lock on a file or folder	40
Identifying a Locked File or Folder.....	40
Subscriptions.....	41
Creating Subscriptions.....	41
Using Subscriptions	41
View existing Subscriptions	41
Cancel existing Subscriptions.....	41

View all of your existing Subscriptions system wide.....	42
Unsubscribe / Cancel an existing Subscription.....	42
Automatic cancellation of a Subscription or notification	42
RSS Feed.....	42
Subscribe to an RSS feed for a file or folder	43
Subscribe to an RSS feed for a search	43
IV: Share and Interact Securely Inside the Organization.....	44
Searching	44
Quick Search	44
Search.....	44
Save a search	44
Save search results	44
Advanced Search.....	45
Saved Search	46
Last Search	46
Manage Searches.....	46
Bookmarks	47
Creating Bookmarks	47
Using Bookmarks.....	48
Edit a bookmark	48
Delete a bookmark.....	48
Share Wizard.....	49
Permissions	52
Read Permission.....	52
Write Permission.....	52

Delete Permission.....	52
Administer Permission	52
Basic Permissions.....	53
Advanced Permissions	53
Overwrite Existing Permissions	54
My Contacts	54
Contacts	55
Add a new Contact.....	55
Delete a Contact	55
Groups	55
Add a new Group	55
Add or remove users for an existing Group	56
V: Share and Interact Securely Outside the Organization.....	57
Email.....	57
Method for sending email.....	57
Email users to indicate shared resources	60
Inserting Images and Links	60
Inserting an image from a website	60
Inserting an image from your Xythos account	61
Inserting a link from a website	61
Inserting a link from your Xythos account.....	61
What happens when this e-mail is received?	62
Tickets	62
Create a ticket.....	63
Default Ticket Values	64

What happens when I e-mail this ticket?	64
What happens when I send a password-protected ticket?	64
E-mail an existing ticket	64
Edit/Retrieve a ticket's password	65
View all of your existing Tickets system wide	65
VI: Xythos Applications (.xapp).....	66
Dropbox	66
Submissions.....	66
Permissions	66
Accessing a dropbox.....	66
Adding content	66
Missing files in the dropbox.....	67
Closed dropbox	67
Creating a dropbox	67
Administering a dropbox	68
Managing a dropbox	68
Using a dropbox.....	68
Uploading files	69
Copy files from your account	69
Wiki.....	69
Creating a Wiki.....	69
Adding Content	70
Create a Wiki Panel	71
Text Editor Panel	71
Saved Search Panel	71

Upload Files Panel	72
Sharing	72
Email	72
VII: Document Management	75
Setting up Workflow Templates	75
New Template	76
Import Template	77
Share Template	77
Edit Template	78
Delete Template	78
Copy Template	79
Export Template	79
Using Workflows	79
Start a Workflow	79
Active Workflows	80
Manage a Workflow	80
Workflow History	81
View Summary	81
Tasks	82
Take Action on a Task	82
Reporting on Workflows	83
Active Workflows	83
View the workflow	83
View the Template Details for a Workflow	84
View the file associated to the Workflow	84

Stop the Workflow	84
Workflow History	84
View the workflow History	85
View the Template Details for a Workflow	85
View the file associated to the Workflow	85
All Workflows	85
Search for Workflows based on initiator	86
Search for Workflows based on workflow template owner	86
Search for Workflows based on date	86
Search for Completed Workflows	86
Search for Running Workflows	87
Setting up Classification	87
Document Classes	87
New Document Class	88
Edit a Document Class	88
Delete a Document Class	89
Properties	89
New Classification Property	89
Edit Classification Property	89
Delete Classification Property	90
Permissions Templates	90
New Permissions Template	90
Edit a Permissions Template's Entries and Permissions	91
Delete a Permissions Template	91
Retention Rules	92

New Retention Rule	92
Edit a Retention Rule	93
Delete a Retention Rule	93
Using Classification	93
Classify a File	93
Assign an Allowable Document Class to a Folder	93
Classify a File Upon Upload	94
Designate a Default Document Class on a Folder	94
Manually Classify a File or Folder	94
Retention Rule	95
Manually Apply a Retention Rule to a File	95
Change a File's Retention Rule	95
Overriding a Retention Rule	96
Expiration Date	96
Reporting on Classification: Expired Documents	96
Generate a Report	96
Viewing Expired Documents	97
Purging Expired Documents	97
Delete an Existing Report	97
Roles	97
Create a new role	98
Edit an existing role	98
Delete an existing role	98
VIII: Other Features	99
My Settings	99

Username.....	99
Display Name.....	99
Timezone	99
Date/Time Style	100
Password	100
Email Settings	101
Toolbar Buttons.....	101
Export	102
Export content.....	102
WebDAV.....	103
Windows.....	103
Mac	105
IX: Xythos Drive.....	106
Xythos Drive	106
Working Online	106
Working Offline	107
Intellittach	108

I: Access and Navigate the Web View

The Web View Layout

The web view is broken down into **six sections** (as shown below in *figure 1.0.0*).

Section one: The **Main Menu** is located at the top of the screen provides a link to your Home folder, account options, and help.

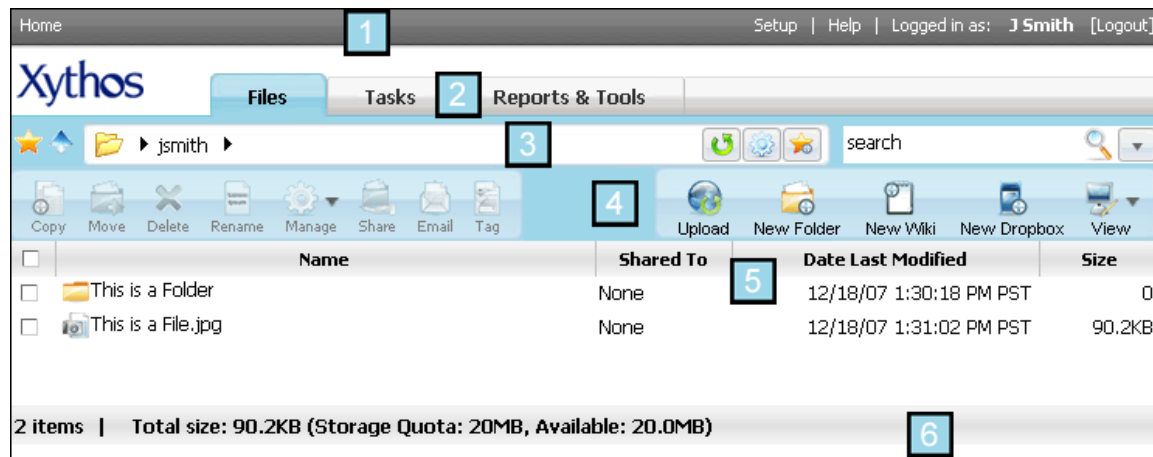
Section two: The **Main Tabs (Secondary Menu)** provides navigation links to various account and file management functions, and is located beneath the Main Menu.

Section three: The **Navigation Toolbar** contains bookmarks and saved searches, the breadcrumb trail, and file navigation options, and is located beneath the Main Tabs.

Section four: The **Toolbar Buttons** contains all buttons appropriate to the screen you are currently viewing, and those you have selected from within your **My Settings** screen, and is located beneath the Navigation Toolbar.

Section five: The **Document Manager Grid** contains all of the contents of the current folder with information pertaining to each item, and is located beneath the Toolbar Buttons.

Section six: The **Footer** contains file size information, number of files, and storage quota information.



(Figure 1.0.0)

Main Menu

The main menu provides account options and assistance in using Xythos. Within the main menu are links to: **Home**, **Setup**, **Help**, **Logout**.



(Figure 1.0.1)

- **Home**
Clicking on the Home link will return you to your home folder.
- **Setup**
Clicking the Setup link will bring you to your account and module management.

- **Help**
Clicking the Help link will display all available help topics. This user friendly help also has an index keyword search available so that you may quickly and easily find what you are looking for. You may also view content specific help by clicking on the help icon on any screen.
- **Logged In as / Logout**
Clicking the Logout link will log your account out of the current Xythos session.

The Navigation Bar



(Figure 1.0.2)

The navigation bar displays your current working folder as well as the folders above it. For example, if you are in the `/home/Organization/Users/jsmith/plant/flower/orchid` folder, your navigation bar will show as follows:

› **home** › **Organization** › **Users** › **jsmith** › **plant** › **flower** › **orchid**



Clicking on the black arrow to the left of the folder name will list the folder name as well as all folders on the same level. Clicking on the black arrow to the right of the folder name will display all sub-folders for that particular folder.

If, for example, you were to click on the arrow to the right of *flower*, you would see a drop-down menu which contains a link to *orchid* and any other sub-folders beneath the *flower* folder.

Clicking on the folder name itself will navigate you instantly to that folder. If, for example, you were to click on the folder name *jsmith*, you would be brought to that folder as long as you have the appropriate access.

Search




























Searches allow you to search for files within your Xythos account. You may search for files you own as well as files which are not owned by you but for which you have access permission. There are three types of searches: Quick Search, Search and Advanced Search. Quick searches are based on the file name and file contents only, Search includes expanded options and Advanced Searches can be conducted based on multiple file criteria. You may both save and edit searches.



(Figure 1.0.3)

Toolbar Buttons

The most commonly used buttons are listed, by default, in the Document Manager. In order to modify the current buttons, visit **My Settings**, and then click on the **Toolbar Buttons** link and select up to 12 buttons**.

	**Bookmarks and Saved Searches: View your existing bookmarks and Searches.		**Quick Search: Perform a quick search of your files and folders.
	Copy: Create a copy of the file or folder.		**Refresh: Update the current view/return to Home.
	Create Bookmark: Add a Bookmark for quick reference.		Rename: Modify the name of the file or folder.
	Delete: Move the file or folder to Trash.		**Restore: Restore a file or folder from the trash.
	Email: Send an email notification once a resource has been shared.		RSS: Create and Receive an RSS feed.
	**Expand: Expand allows for additional options.		**Save to Desktop: View or Save the file.
	Manage: View and edit the file or folder's configuration.		Save to Zip File: Copy files or folders to your local computer.
	Move: Modify the location of the file or folder.		Share: Share with other users.
	**New Dropbox: Create a new dropbox.		Subscribe: Notification of changes via e-mail.
	**New Folder: Create a new folder.		Tag: Create keywords.
	**New Wiki: Create a new wiki.		**Trash: Empty the Trash.
	**Open: View the file.		**Up: Navigate one folder above the current folder.
	**Overwrite: Overwrite the existing file.		**Upload: Using either basic or advanced upload, add files and folders.
	**Cannot be modified in the Toolbar Button options screen.		**View: Modify the current folder view.

(Figure 1.0.4)

Document Manager Grid

The Document Manager Grid shows the contents of the current folder with information pertaining to each item. Each file or folder is listed on a separate row and, by default, contains the item's **Name**, **Share status**, **Lock status**, **Date of last modification**, and **Size**.

<input type="checkbox"/>	Name	Shared To	Date Last Modified	Size	Tags
<input type="checkbox"/>	This is a Folder	Some	7/7/08 1:33:19 PM PDT	128.3KB	
<input type="checkbox"/>	This is an unclassified folder	None	7/2/08 12:39:48 PM PDT	0	
<input type="checkbox"/>	trash	None	7/3/08 1:14:55 PM PDT	204.4KB	
<input type="checkbox"/>	Strategy Wiki.xapp	None	7/7/08 3:16:56 PM PDT	10.6KB	
<input type="checkbox"/>	This is a File.jpg	None	7/3/08 1:14:55 PM PDT	33.8KB	
<input type="checkbox"/>	File.jpg	None	7/3/08 1:23:18 PM PDT	33.8KB	

6 items | Total size: 410.6KB (Storage Quota: 20MB, Available: 19.6MB) Powered by Xythos

(Figure 1.0.5)

You may customize the information displayed, by clicking the **View** button.

Folder View Settings



Also available for modification are the columns displayed in the Document Manager. By default, Xythos displays the **Name**, **Share status**, **Lock status**, **Date of last modification**, and **Size** of each item. However, by clicking on the **View** button, and then clicking on the **Add/Remove columns** link, you may display alternate information for each file and folder. The view option allows the owner of a folder or sub-folder to set the way the folder or sub-folder appears to all users. As the owner, you may select the visible columns, the order of those columns, and the sorting order of each column. Depending on your ownership of the folder and/or your role in the system, you may see different options.

<input type="checkbox"/>	Name	Shared To	Date Last Modified	Size	Tags
--------------------------	------	-----------	--------------------	------	------

(Figure 1.0.6)

Move a column by clicking the column header and dragging the column into a new position. Resize a column by mousing over the columns border and dragging left or right.

Sorting Your Files and Folders

The order of your file and folders may be sorted according to name, owner, creation date, created by user, size, last modification date, last modification user or content type. In other words, any available column may be used for sorting.

By clicking on the title of each of these columns, files and folders will automatically sort in ascending order, grouping folders separately from files. To sort in descending order, click the

column title again. The "up" arrow indicates that the contents are sorted in ascending order while the "down" arrow indicates descending order.

Footer

The footer contains the total number of items in the folder listing and the current folder's quota and size information.

2 items | Total size: 90.2KB (Storage Quota: 20MB, Available: 20.0MB)

(Figure 1.0.7)

- **Item count** - The total number of files and folders within the current folder.
- **Total Size** - The sum of the size of all files and the size of all sub-folders, including each sub-folder's contents.
- **Quota** - The maximum amount of information that can be saved in the current folder.
- **Available** - The difference between the total size and the quota, i.e. how much space remains available for you to use for saving files and folders within the current folder.
- **None** - The current folder does not have a Quota set and is instead inheriting the parent folder's Quota setting.

The Right-Click Menu

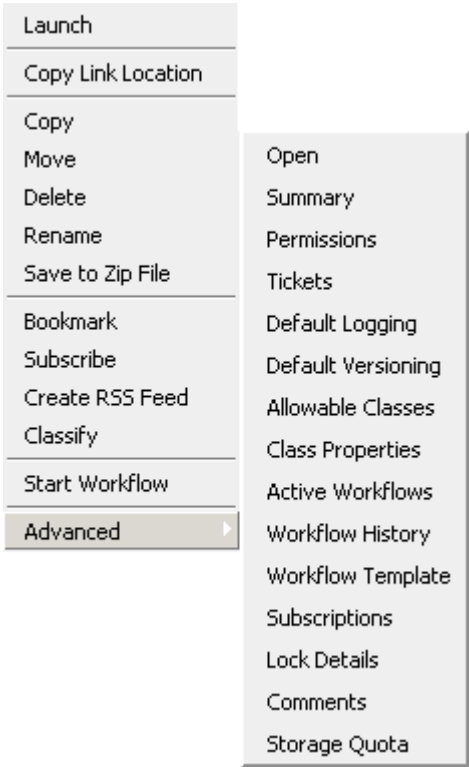
Each file and folder has a **Right-Click** menu featuring the following actions (depending on your access):

File	Folder
Open in Xythos Drive	Open
Save to Desktop	Manage
Open in Browser	Share
Manage	Email
Share	Copy Link Location
Email	Copy
Copy Link Location	Move
Copy	Delete
Move	Rename
Delete	Save to Zip File
Rename	Bookmark
Save to Zip File	Subscribe
Bookmark	Create RSS Feed
Subscribe	Classify
Create RSS Feed	Start Workflow
Tag	
Start Workflow	
Summary	Summary
Permissions	Permissions
Tickets	Tickets
Logging	Default Logging
Versioning	Default Versioning
Class Properties	Allowable Classes
Retention	Class Properties
Tags	Active Workflows
Active Workflows	Workflow History
Workflow History	Workflow Template
Subscriptions	Subscriptions
Lock Details	Lock Details
Comments	Comments
Content Type	Storage Quota

(Figure 1.0.8)

(Figure 1.0.9)

Xythos Application (.xapp)



(Figure 1.1.0)

II: Manage your Files and Folders via the Web View



New Folder Wizard

The **New Folder Wizard** guides you through creating, sharing, emailing and configuring your new folder. You may follow each step of this wizard, skip through to the desired step or end the wizard at any time.

Xythos

jsmith > This is a Folder

Name the New Folder Choose Users Verify Permissions Configure Set Classes Send Email

Name the New Folder


If you wish to simply create a folder, name the folder and click **Finish**. If you wish to change the default sharing of this folder, click **Next**.

Folder Name:

Cancel Next Finish

(Figure 2.0.0)

1. Within the **Document Manager** click the **New Folder**  button.
2. You are now in the **New Folder Wizard**.
3. Enter a name for the folder in the **Folder Name** field.
4. *Optional: Click **Finish** to exit the Wizard.*
5. Click **Next**.


 ▶ jsmith ▶ This is a Folder ▶ Folder

Name the New Folder Choose Users Verify Permissions Configure Set Classes Send Email

Choose Users

Once you add users and groups, you will set their permissions in the next step. Or, click Finish to create the folder.

Choose Users

To share with users or groups, enter the user's or group's name or email address. To share with users outside of the system, enter that user's email address.

Separate users by commas or semicolons.

Search for Users

Cancel

Back

Next

Finish

(Figure 2.0.1)

Choose Users

1. Choose users with whom you would like to share the contents of the new folder.
2. Either begin typing in the user information in the box provided, or use the find utility by clicking on the **Search for Users** button.
3. All users and/or groups you have selected will appear in the box.
4. *Optional: Click **Next** (while leaving the fields blank) to skip the Choose Users portion of the Wizard, or click **Finish** to exit the Wizard.*
5. Click **Next**.

▶ jsmith ▶ This is a Folder ▶ Folder

Name the New Folder Choose Users **Verify Permissions** Configure Set Classes Send Email

Verify Permissions

Defined the type of access other users will have.

Name	Type	Viewer (Read-Only)	Contributor (Read, Write, Delete)	Full Access (Read, Write, Delete, Administer)	Other...
Owner (J Smith (jsmith))	User			<input checked="" type="checkbox"/>	
Authenticated Users	Group	<input type="radio"/>	<input type="radio"/>		
Public	Group	<input type="radio"/>	<input type="radio"/>		
J Smith (jsmith)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	


☒ Apply the changed permissions to this folder as well as its sub-folders and files.
☐ Apply the changed permissions to this folder only.

Cancel Back Next Finish

(Figure 2.0.2)

Verify Permissions

1. Select your preferred sharing options.
2. You may select the following options: Viewer, Contributor, or Full Access.
3. You will need to determine whether this access should apply to the current folder only, or this folder and all sub-folders by clicking on the appropriate radio button.
4. *Optional:* Click **Finish** to exit the Wizard.
5. Click **Next**.


 ▶ jsmith ▶ This is a Folder ▶ Folder

Name the New Folder Choose Users Verify Permissions **Configure** Set Classes Send Email

Configure

You may define the default settings for this folder now. Or, you may choose to configure these options once the folder is created on the folder's *Manage* page.

☐ For all new files added to this folder, store file versions by saving a separate copy each time the file is edited. (*Default Versioning*)

☐ For all new files added to this folder, maintain a history of how the content has been accessed. (*Default Logging*)

Set storage quota size: (Unlimited) MB

Set a subscription. Send me an email when

☐ this folder or any of its files are edited
☐ this folder or any of its files are viewed
☐ a comment is added to this folder or any of its files

Send these notifications when the event happens

Cancel Back Next Finish

(Figure 2.0.3)

Configure

1. You will now be brought to the **Configure** screen.
2. Select your preferred configuration options:
 - a. Versioning
 - b. Logging
 - c. Storage Quota
 - d. Subscriptions
3. *Optional: Click **Back** to return to the previous step, or click **Next** to skip the Configuration portion of the wizard, or click **Finish** to exit the Wizard.*
4. Click **Next**.

▶ jsmith ▶ This is a Folder ▶ Folder

Name the New Folder Choose Users Verify Permissions Configure **Set Classes** Send Email

Classify

You may choose to define this folder's *allowable* document classes. When a file is uploaded to this folder, users can choose from the allowable document classes in order to classify the uploaded file. You may define these document classes now. Or, you may choose to configure this option once the folder is created by on the folder's *Manage* page.

Document Classes

This is a Document Class

<-

->

<<--

-->>

Allowed Document Classes

Make Default

* - Denotes Default

Cancel

Back

Next

Finish

(Figure2.0.4)

Set Classes (This option is only available if Classification is enabled)

1. Select your allowable document class(es) for this folder.
2. *Optional:* Click **Back** to return to the previous step, or leave the settings blank and click **Next**, or you may click **Finish** to exit the Wizard.
3. Click **Next**.

▶ jsmith ▶ This is a Folder ▶ Folder

Name the New Folder Choose Users Verify Permissions Configure Set Classes Send Email

Send Email

You may edit the text surrounding the table of files only. File links will be added once the email is sent.

☒ Send the below email when I click Finish

Mary Snow (msnow@xythos.com) ✕ Henry Jenkins (hjenkins@xythos.com) ✕

To: (all the members of) admin group ✕ Tony Crow (tcrow@xythos.com) ✕

Subject: J Smith has shared some resources to you

The following has been shared to you.

File	Subscribe to and/or Bookmarks
Your list of files will be added to this table once you send this email.	

Thank you,
J Smith

☐ Also send the email to me (J Smith)

Cancel

Back

Finish

(Figure 2.0.5)

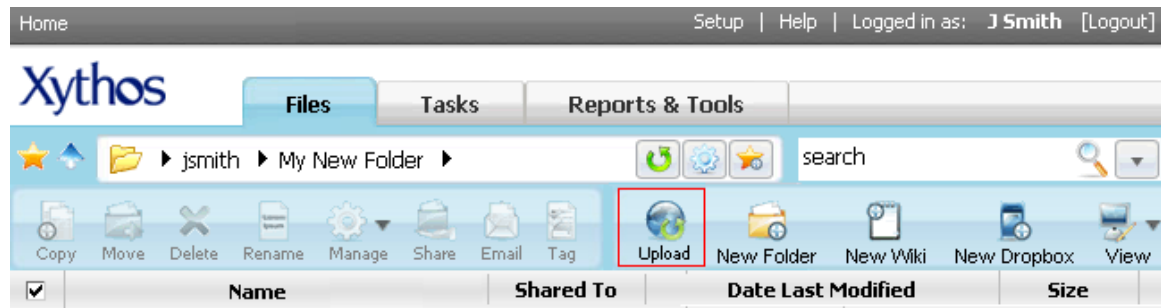
Send Email

1. You will now be brought to the **Email** screen.
2. Create an email to notify users of the new folder and or share.
3. *Optional:* Click **Back** to return to the previous step.
4. Click **Finish** to exit the Wizard. Be aware that if you do not uncheck the **Send the below email when I click Finish** option, the email shall be sent to all users listed.

Uploading a File or Folder


There are two modes of upload, **Basic** and **Advanced**. Basic upload allows you to browse one file at a time, until you have compiled a list of files to upload. Advanced upload allows you to drag-and-drop files or folders onto the Advanced upload screen. The upload mode can be easily switched at any time by clicking either the "Basic Upload" or "Advanced Upload" links on the Upload screen. Whichever mode you choose will be displayed the next time you upload files.

**Note: Advanced Upload mode requires version 1.5 or higher of the Java plug-in available from www.java.com. If you have the Java plug-in installed but it is not version 1.5 or higher, you will experience problems when attempting to use the Advanced Mode. If you do not wish to download and install the Java plug-in, use Basic Upload.*



(Figure 2.0.6)

Basic Upload



jsmith >


Upload File in: /jsmith

For faster uploads, including the ability to upload folders and their contents, try our [Advanced Upload](#). Note that Advanced Upload requires the [Java 1.5 or higher](#) plugin available from Sun Microsystems.

Name
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="X"/>

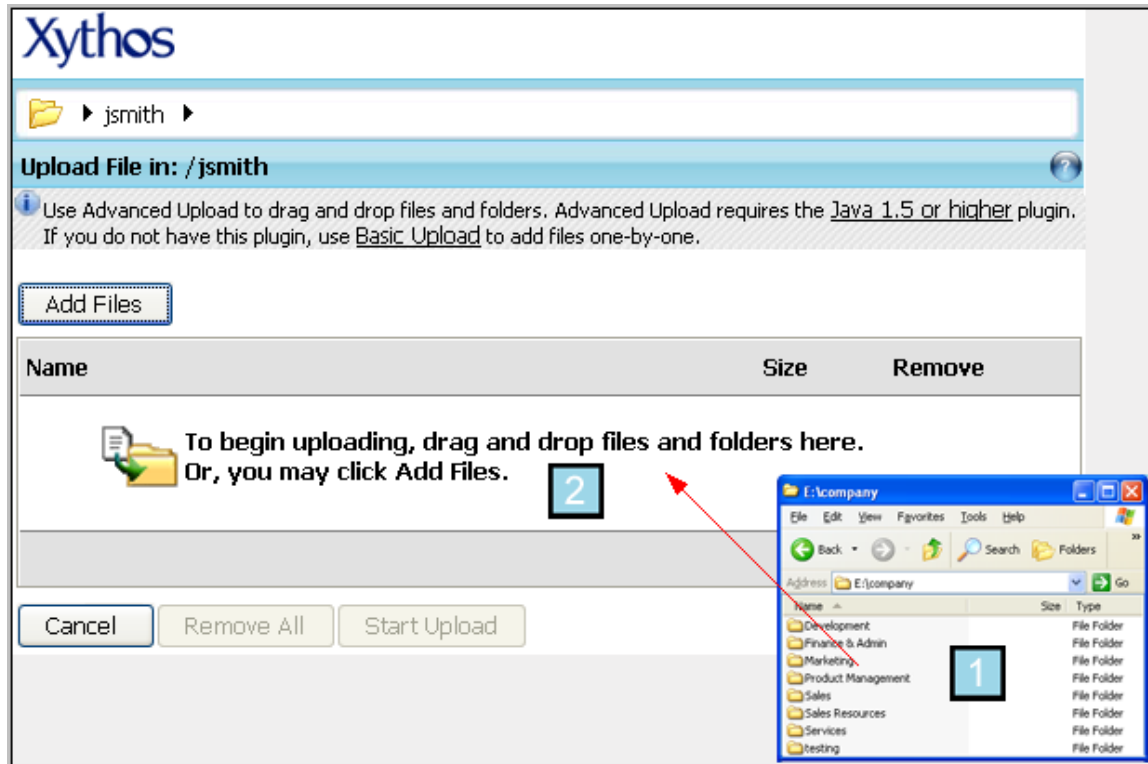
☐ Overwrite file if it already exists.

(Figure 2.0.7)


1. Navigate to the folder to which you wish to upload files.
2. Click the **Upload**  button.
3. If in advanced mode, click on the **Basic Upload** link.
4. **Browse** to the file you wish to upload.
5. If you wish to upload more files, click **Add Files** and **Browse** to the file. Repeat this step for as many files as you wish to upload.
6. Click **Start Upload**.



Advanced Upload



(Figure 2.0.8)

1. Navigate to the folder to which you wish to upload files.
2. Click the **Upload**  button.
3. If in basic mode, click on the **Advanced Upload** link.
4. You may either drag and drop files and folders onto the drag-n-drop area or you may click **Add Files** and select files from your local machine.
5. Click **Start Upload**.
6. Should the upload stop or receive an error, click **Done** to exit the upload page.

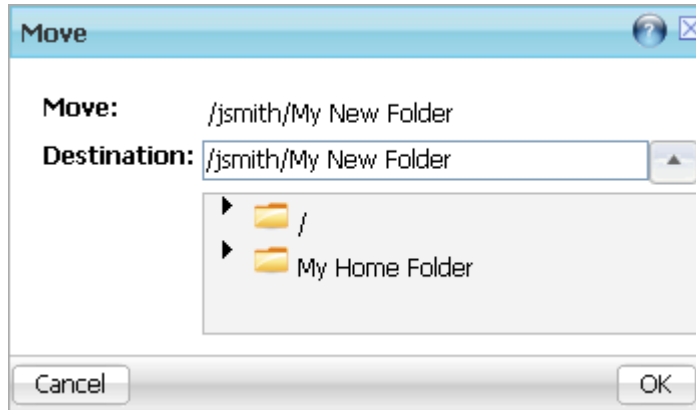


Renaming a File or Folder

1. Navigate to the file or folder you would like to rename.
2. **Right-click** on the file or folder and select the **Rename** option.
3. Enter in the name you would like in the **Rename** field.
4. Click **Ok** to complete the Rename, or click **Cancel** if you would not like to rename the file or folder.

Moving a File or Folder

When moving a file or folder you have two options for determining the destination location. Sharing and permissions of the original files or folders carry over to the moved files or folders. If you would not like the moved file or folder to be shared any longer, you must explicitly remove access.




(Figure 2.0.9)



Move a single file or folder

1. Navigate to the file or folder you would like to move.
2. **Right-click** on the file or folder and select the **Move** option.
3. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.

-OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to move the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly. This does not require you to manually enter any information.


**Note: Using the default destination location will result in the following error message: "You cannot move or rename a file to itself, or a folder to a sub-folder of itself".*



Move multiple files or folders

1. Navigate to the files or folders you would like to move.
2. Place a checkmark in the box associated to the files and or folders that you wish to move.
3. **Right-click** on any of the selected files or folders and select the **Move** option.
4. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.

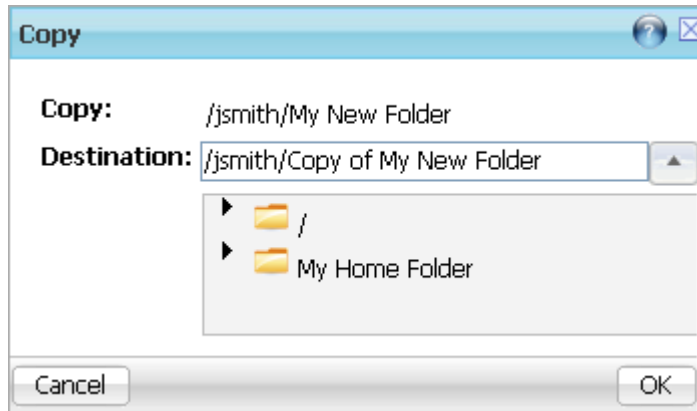
-OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to move the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly. This does not require you to manually enter any information.

**Note: Using the default destination location will result in the following error message: "You cannot move or rename a file to itself, or a folder to a sub-folder of itself".*

Copying a File or Folder

When copying a file or folder you have three options for determining the destination location. Sharing and permissions of the original files or folders do not carry over to the new copy. If you would like the copy of the file or folder to be shared, you must explicitly grant access.




(Figure 2.1.0)



Copy a single file or folder

1. Navigate to the file or folder you would like to copy.
2. **Right-click** on the file or folder and select the **Copy** option.
3. Use the default location and name that have already been supplied. This will be the name of the original file or folder with the words "Copy of" preceding the original name. Using this method will copy the file or folder to the same level in the folder structure as the original file or folder.
4. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.

-OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to place the copy of the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly.


5. Once you have selected a destination location using one of the above methods, click **Ok** to complete the Copy. Click **Cancel** if you would not like to copy the file or folder.



Copy multiple files or folders

1. Navigate to the files or folders you would like to copy.
2. Place a checkmark in the box associated to the files and or folders that you wish to copy.
3. **Right-click** on any of the selected files or folders and select the **Copy** option.
4. Use the default location and name that have already been supplied. This will be the name of the original file or folder with the words "Copy of" preceding the original name. Using this method will copy the file or folder to the same level in the folder structure as the original file or folder.
5. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.

-OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to place the copy of the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly.

Deleting a File



Delete a single file or folder

1. Navigate to the file or folder you would like to delete.
2. **Right-click** on the file or folder and select the **Delete** option.





Delete multiple files or folders

1. Navigate to the files or folders you would like to delete.
2. Place a checkmark in the box associated to the files and or folders that you wish to delete.
3. **Right-click** on any of the selected files or folders and select the **Delete** option.

When you choose to delete files, the files are not immediately deleted, but are instead moved into your Trash. If a file is accidentally sent to the **Trash**, it may be restored by visiting the trash folder. Files in your Trash count against your total available storage in your account. If you are approaching your maximum storage amount, select items to permanently delete from your **Trash** in order to free up storage.




Permanently delete all files or folders within your Trash

1. Double click the **Trash**  icon located in your home folder.
2. To delete the entire contents of **Trash**, click the **Empty Trash**  button.
3. Confirm that you wish to permanently delete all items in your Trash by clicking **Ok** or click **Cancel** if you do not wish to empty Trash at this time.



Restore a deleted file or folder which exists in your Trash


Files may be restored to their original location, as long as the location still exists and you have access. If the file or folder is not able to be restored to the original location, you will be prompted to provide a new location. If restoring a folder and all of its contents, restore the folder first. Restored files will keep their permissions and other attributes.

1. Double click the **Trash**  icon located in your home folder.
2. All previously "deleted" items will be displayed. Put a check in the box associated to the file or folder that you wish to restore.
3. Click the **Restore** button.



Retrieve an overwritten file which exists in your Trash

Overwritten files are placed in a special sub-folder of the trash named *Overwritten Files*. Overwritten files are automatically versioned. You may not restore an overwritten file, however you may retrieve a version just as you would with any other versioned file.

1. Double click the **Trash**  icon located in your home folder.
2. Double click the **Overwritten Files** folder.
3. All previously "overwritten" items will be displayed. Put a check in the box associated to the version of the file or folder that you wish to retrieve.
4. **Right-Click** on the file you wish to retrieve, and select **Manage -> Versioning**.
5. You may retrieve a version the same way you would any other versioned file.



Save to Zip File

1. Navigate to the file(s) or folder(s) you would like to Save to Zip File.
2. **Right-click** on the file or folder and select the **Save to Zip File** option.

Copy Link Location

1. Navigate to the file or folder you would like to copy the link location.
2. **Right-click** on the file or folder and select the **Copy Link Location** option.



Save to Desktop

1. Navigate to the file you would like to save to your desktop.
2. **Right-click** on the file and select the **Save to Desktop** option.



Open (File) in Browser

1. Navigate to the file you would like to open.
2. **Right-click** on the file and select the **Open in Browser** option.
3. The file will then be launched using your default web browser.

Open (Folder)

1. Navigate to the folder you would like to open.
2. **Right-click** on the folder and select the **Open** option.
3. The contents of the folder will be opened/displayed.


Content Type

Depending on the method used for uploading a file to your account, your file may be displaying as the wrong file mime-type. If there was a problem with the file or the client used to upload the file did not properly recognize the file's mime-type, it may be necessary to manually change your file's type.

Change the Content Type of a file

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to change the content type.
3. **Right-Click** the file's name and select **Manage -> Content Type**.
4. You may select from the list provided, or you may manually enter the new file type by choosing **Other** from the type drop-down list.

Content Type for /jsmith/This is a File.jpg

Current content type:  image/jpeg

New content type: Other...

▼

image/jpeg














Apply

Exit

(Figure 2.1.1)

- Click the **Apply** button to view applied changes, or click the **Exit** button to save the changes and exit the Document Manager screen.

Xyθος can properly display the following file icons:

File Icon	Type	Type Code
	Adobe Acrobat/PDF	application/pdf
	Audio	audio/*
	Excel Spreadsheet	application/vnd.ms-excel
	Executable/Application	application/octet-stream
	HTM/HTML	text/html
	Image	image/*
	Java/Javascript	application/x-javascript
	Powerpoint Presentation	application/vnd.ms-powerpoint
	Text Document	text/plain
	Video/Movie	video/*
	Word Document	application/msword
	XML	text/xml
	Zipped File	application/*zip*

(Figure 2.1.2)

Manage Summary

The **Manage Summary** screen provides, at a glance, the properties of the file or folder you are currently viewing. From this screen you may click the links available from the left navigation in order to modify the file or folder properties. The toolbar buttons in the Manage Summary screen are expanded upon in order to allow you to effectively manage your files. You will have different options depending on your permissions, whether it is a file or folder, and which modules your administrator has installed.

Manage Summary for a File

The screenshot shows the Xythos web interface. At the top, there is a navigation bar with 'Home', 'Setup', 'Help', and 'Logged in as: J Smith [Logout]'. Below this is the Xythos logo. The main content area has a breadcrumb trail: 'jsmith > This is a File.jpg'. A toolbar contains icons for 'Save to Desktop', 'Open', 'Copy', 'Move', 'Delete', 'Rename', 'Save to Zip File', 'Email', 'Start Workflow', 'Bookmark', 'RSS', and 'Overwrite'. The 'Manage' section is active, showing a 'Summary for /jsmith/This is a File.jpg'. On the left, a sidebar lists navigation options: Summary (selected), Permissions, Tickets, Logging, Versioning, Class Properties, Retention, Tags, Active Workflows, Workflow History, Subscriptions, Lock Details, Comments, and Content Type. The main area displays the following details:

Owner:	J Smith (jsmith)
Full URL:	http://server/xythoswfs/jsmith/This is a File.jpg
Intellilink URL:	http://server/xythoswfs/webview/_xy-3241_1
Created by:	J Smith (jsmith)
Created on:	6/27/08 2:38:40 PM PDT
Last Modified by:	J Smith (jsmith)
Date Last Modified:	7/3/08 1:14:55 PM PDT
Size:	33.8KB (34,521 bytes)

Classified as:	This is a Document Class
Retention Rule:	Unassigned
Expires:	Unassigned
Permanent:	No


Permissions:	None
Tickets:	None
Logging:	Off
Versioning:	Off
Classified as:	This is a Document Class
Tags:	None
Active Workflows:	None
Subscriptions:	None
Lock Status:	Not locked
Comments:	None
Content Type:	image/jpeg


An 'Exit' button is located at the bottom right of the screen.










(Figure 2.1.3)

Manage Summary for a Folder

[Home](#) | [Setup](#) | [Help](#) | Logged in as: **J Smith** [[Logout](#)]



 ▶ [jsmith](#) ▶ [This is a Folder](#) ▶

 [Copy](#)  [Move](#)  [Delete](#)  [Rename](#)  [Save to Zip File](#)  [Email](#)  [Start Workflow](#)  [Bookmark](#)  [RSS](#)

Manage

>> **Summary**

[Permissions](#)

[Tickets](#)

[Default Logging](#)

[Default Versioning](#)

[Allowable Classes](#)

[Class Properties](#)

[Active Workflows](#)

[Workflow History](#)

[Workflow Template](#)

[Subscriptions](#)

[Lock Details](#)

[Comments](#)

[Storage Quota](#)

Summary for /jsmith/This is a Folder

Owner:

J Smith (jsmith)

Full URL:

<http://server/xythoswfs/jsmith/This is a Folder>

Intellilink URL:

http://server/xythoswfs/webview/_xy-3239_1

Created by:

J Smith (jsmith)

Created on:

6/27/08 1:27:27 PM PDT

Last Modified by:

J Smith (jsmith)

Date Last Modified:

7/3/08 1:09:26 PM PDT

Size:

58.8KB (60,183 bytes)

Available Space:

19.7MB (20,634,025 bytes)

Storage Quota:

None

Sharing:

Some

Tickets:

None

Default Logging:

Off

Default Versioning:

Off

Allowable Classes:

None

Active Workflows:

None

Subscriptions:

None

Lock Status:

Not locked

Comments:

None

[Exit](#)

(Figure 2.1.4)

III: Manage your File and Folder Content

Comments

Comments offer users the ability to create notes about a particular file or folder without altering the contents of that file or folder.

Comments for /jsmith/My New Folder

Enter new comment here

Save Comment

J Smith said:
This is a comment
1/10/08 8:41:00 AM PST

Delete All Comments

Exit


(Figure 3.0.0)

Comment a file or folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. **Right-Click** the selected file or folder.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Enter text into the comments box.
6. Once you have finished entering the comment text, click the **Save Comment** button to view applied changes, or click the **Exit** button to save the changes and exit the Comments screen.



Delete a single comment on a file or folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. **Right-Click** the selected file or folder.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Click the delete  icon next to the comment you wish to delete. The comment will be immediately and permanently deleted.
6. Click the **Exit** button to exit the Comments screen.

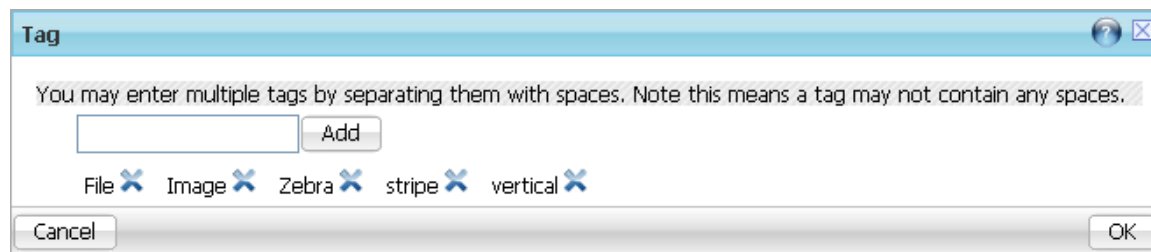
Delete all comments on a file

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. **Right-Click** the selected file.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Click the **Delete All Comments** button. All comments will be immediately and permanently deleted.
6. Click the **Exit** button to exit the Comments screen.

Tags

Xythos allows you to create searchable keywords for files, which are called **Tags**. **Tags** are used for files and cannot be used for folders, however, you may **Tag** all files in the folder. In order to **Tag** a file you must have **Read** and **Write** permission for that file. If, however, you would like to search for a Tag, you need only have **Read** to view them. When creating **Tags** there is not any type of character limitation, so the **Tag** may be as long or as short as you would like; there is also no limit to the number of **Tags** a file may have.

Within the **Document Manager** you may set your **Document Manager Columns** to show the **Tags** associated to the files.



(Figure 3.0.1)

Add a Tag on a file

1. Navigate to the file you would like to **Tag**.
2. **Right-Click** on the file and select **Tag** from the menu.
3. Type in the **Tag** you would like associated to this file, and then click the **Add** button.
4. You may add as many **Tags** as you would like by using the **Add** button.
5. Click the **OK** button once all **Tags** have been added.




Note: Words separated with a space will be identified as separate tags. You may enter several tags for the file at once by separating words with spaces. If you click the **Ok button prior to clicking the **Add** button, no **Tags** will be added.*

Add a Tag for multiple files

1. Navigate to the files you would like to **Tag**.
2. Place a check mark in the boxes associated to the files.
3. **Right-Click** on the file and select **Tag** from the menu.
4. Type in the **Tag** you would like associated to the files, and then click the **Add** button.
5. You may add as many **Tags** as you would like by using the **Add** button.
6. Click the **OK** button once all **Tags** have been added.


Note: Words separated with a space will be identified as separate tags. You may enter several tags for the file at once by separating words with spaces. If you click the **Ok button prior to clicking the **Add** button, no **Tags** will be added.*

Search by Tag

1. Click the **Expand**  button to the right of the **Search**  icon in order to expand the Search options.
2. Click the **Expand**  button to the right of **Add More Search Criteria**.
3. Select **Tags** from the **Select Property** drop-down box.
4. Click the **Add** button.
5. Type the name of the **Tag** you are looking for in the **Tags** field.
6. Click the **Search** button.




Delete a Tag on a file

1. Navigate to, or search for, the file you would like to remove the **Tag** from.
2. **Right-Click** on the file and select **Tag** from the menu.
3. Within the **Tag** screen you will see all **Tags** associated to the file.
4. Click the delete  icon for the associated **Tag**.
5. Click the **OK** button once you have finished modifying the **Tags** associated to the file.



Delete a Tag for multiple files

1. Navigate to, or search for, the files you would like to remove the **Tag** from.
2. Place a check mark in the boxes associated to the files.
3. **Right-Click** on the file and select **Tag** from the menu.
4. Within the **Tag** screen you will see all **Tags** associated to the files.
5. Click the delete  icon for the associated **Tag**.
6. Click the **OK** button once you have finished modifying the **Tags** associated to the files.

Logging

The Logging option allows you to keep a record of who accesses your files and when they do so. The current Logging status of a file, *on* or *off*, can be seen in the file's **Summary/Manage** screen.

When an action is performed against a file, an entry is added to the log history including:

- The user who performed the action
- The type of action performed
- The date and time the action occurred
- The IP Address of the machine from where the action occurred

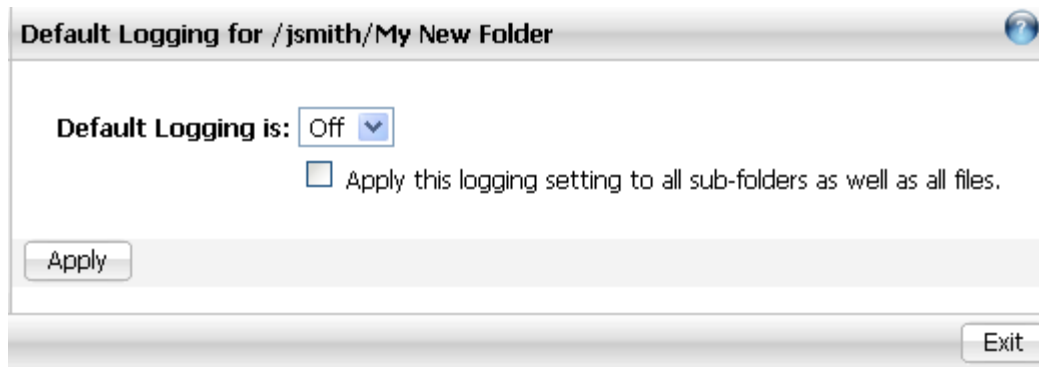
Actions include but are not limited to users viewing or editing the file, permission changes, and file comments that are added, edited, or deleted.

Default Logging

The Logging option on a folder differs from the logging setting of a file. With files, the system allows you to keep a record of who accesses your files and when they do so. Logging on a folder, however, sets the default logging for all files created within that folder. The folder itself does not have logging history, instead it dictates the default logging for the files created within the folder.

If Logging is Off for a folder, each new file uploaded to that folder will be uploaded with Logging disabled. Additionally, all new sub-folders will have a Default Logging parameter of **Off**.

If Logging is On for a folder, each new file uploaded to that folder will be uploaded with Logging enabled. Additionally, all new sub-folders will have a Default Logging parameter of **On**.



(Figure 3.0.2)

Turn Default logging on or off for a folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to change default Logging.
3. **Right-Click** on the folder, and then select **Manage -> Default**.
4. Use the Logging on/off drop-down to turn logging on or off. If you would like this parameter changed for all existing files and sub-folders within this folder, put a check mark next to "**Apply this logging setting to all sub-folders as well as all files**". Otherwise, this setting will only apply to new files and sub-folders created in the future in this folder.
5. Click the **Apply** button to view applied changes, or click the **Finish** button to save the changes and exit the Logging screen.

Logging

Turn logging on or off or to view a history of file access

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on logging.
3. **Right Click** the selected file, and then click the **Manage -> Logging** option.
4. Within the **Logging** screen, click the **Enable Logging** button.

Versioning

The Versioning function is an effective way to keep track of the changes made to any file. Versioning allows you to see changes that were made each time a file was saved; this is especially useful when there are multiple users making changes.

When you turn on the Versioning option for a file, the system automatically keeps a copy of each file that is updated. If you or another user edits your file and saves the changes, Versioning allows you to go "back" to the older copy before the changes were made. Versioning provides an automatic backup for overwritten files.

Versioning also includes the ability to **Checkin** and **Checkout** a file. By checking a file in and out (while versioning is enabled), you can make multiple edits to the file without saving multiple versions of the file. **Checkin** and **Checkout** allows you to better leverage your versioning system; you can control exactly which versions are saved in a file's history.

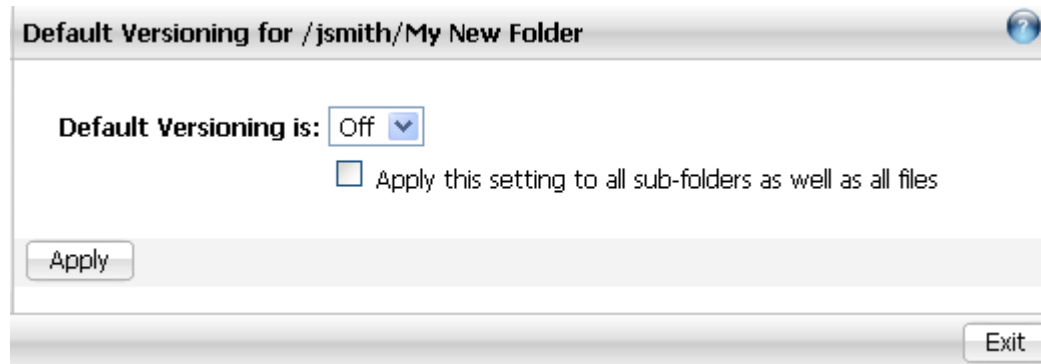
Default Versioning

The Versioning setting on a folder differs from the versioning setting of a file. With files, the system allows you to track every change made to any file by saving a copy (version) of a file each time that file is saved. Versioning on a folder, however, sets the default versioning for all files created within that folder. The

folder itself does not have versioning history, instead it dictates the *default* versioning for the files created within the folder.

If Versioning is **Off** for a folder, each new file uploaded to that folder will be uploaded with Versioning disabled. Additionally, all new sub-folders will have a Default Versioning parameter of **Off**.

If Versioning is **On** for a folder, each new file uploaded to that folder will be uploaded with Versioning enabled. Additionally, all new sub-folders will have a Default Versioning parameter of **On**.



(Figure 3.0.3)

Turn default versioning on or off for a folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to turn on versioning.
3. **Right-Click** the selected file or folder, and then click the **Manage -> Default Versioning** option.
4. Use the Default Versioning on/off drop-down to turn default versioning on or off. If you would like this parameter changed for all existing files and sub-folders within this folder, put a check mark next to "Apply this default versioning setting to all sub-folders as well as files". Otherwise, this setting will only apply to new files and sub-folders created in the future in this folder.
5. Click the **Apply** button to view applied changes, or click the **Finish** button to save the changes and exit the Default Versioning screen.

Versioning

Turn Versioning on or off for a file

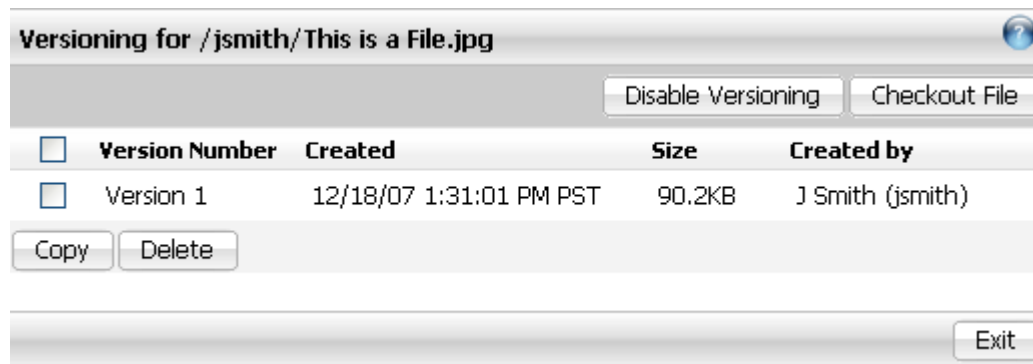
1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on versioning.
3. **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
4. Use the **Enable/Disable Versioning button** to turn versioning on or off.
5. Click the **Exit** button to save the changes and exit the Versioning screen.

View an older version of a file

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on versioning.
3. **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
4. The Versioning window displays each "stage" of an evolving document: Version 1, Version 2, etc.
5. Clicking on the version number will allow you to view (not edit) the file in that particular stage. For example, to view "Version 1" click on "Version 1" and you will be able to view the file prior to any changes made in later versions.

The versioning system also allows you to copy any version of your file, thus creating a **fully editable copy** of your file at any stage in its history.

Regain an older version of a file



(Figure 3.0.4)

1. Navigate to the **Document Manager** screen
2. Navigate to the file for which you wish to turn on versioning.
3. **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
4. The Versioning window displays each "stage" of an evolving document: Version 1, Version 2, etc.
5. Place a checkmark in the associated version of the file you wish to copy.
6. Click the **Copy** button in the Versioning window and specify or browse to a destination path for the new copy.
7. To rename the file, simply change its name in the Destination text box and click on **Ok**. The copied version now appears in the current folder listing.

When you turn versioning on for a file, you are automatically given the option to Checkin and Checkout that file. There are 3 types of actions involved in file checkin/checkout:

- **Checking out** a file allows a user to edit the file and save it multiple times without creating multiple versions of that file. Checking out a file also creates a lock (if the file is not already locked) on a file which prevents other users with write permission on that file from editing it. Checking out a file does not, however, prevent users with read permission from seeing the changes made to the file while it is checked out. Users will be able to see the very latest version of the file whether or not the file has been checked in.
- **Checking in** a file creates a permanent version of the file that encompasses all changes made while the file was checked out. Checking in a file also removes the lock on the file.
- **Unchecking out** a file not only removes the lock that was created when the file was checked out, but it also removes the temporary Version of the file that was created when the file was checked out. Unchecking out a file essentially reverses the entire checkout process. No changes made to the file while the file was checked out are kept after the file is unchecked out.

Checkout

1. Navigate to the **Document Manager** screen
2. Navigate to the file you wish to check out.
3. **Right Click** the selected file, and then click the **Manage -> Versioning** option.
4. Click the **Checkout File** button. Automatically, a temporary version of this checked out file is created.
5. Click **Exit** button to exit the **Versioning** screen.

You may now edit this file as you wish and no additional versions of it will be created.

Checkin

1. Navigate to the **Document Manager** screen.
2. Navigate to the file you wish to check in.
3. **Right Click** the selected file, and then click the **Manage -> Versioning** option.
4. Click the **Checkin File** button. The checked in version overwrites the temporary version that was created when the file was checked out.
5. Click **Exit** button to exit the **Versioning** screen.

Uncheckout

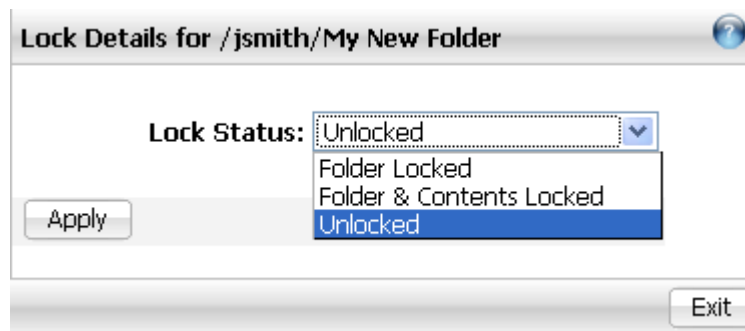
1. Navigate to the **Document Manager** screen
2. Navigate to the file you wish to un-checkout.
3. **Right Click** the selected file, and then click the **Manage -> Versioning** option.
4. Click the **Uncheckout File** button. The temporary version that was created when the file was checked out is automatically deleted.
5. Click **Exit** button to exit the **Versioning** screen.

Locking

Locking files and folders prevents other users from editing or saving changes to a particular file for a defined period of time. You can control who is able to write to any item (file or folder) at any specific time. A lock stays locked until you release it or the lock expires.

Types of Locks: Simple and Recursive

Simple locks are applied to one file or one folder; a recursive lock applies to a folder and all of its contents, including both files and sub-folders.



(Figure 3.0.5)

Create a lock on a file

1. On the **Document Manager** screen, **Right-Click** the selected file.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock** screen, select either **Locked** or **Unlocked** for **Lock Status**.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Create a lock on a folder

1. On the **Document Manager** screen, **Right-Click** the selected folder.
2. Click the **Manage -> Lock Details** option.

3. Within the **Lock Details** screen, select either **Folder Locked, Unlocked** for **Lock Status**. Do not select **Folder and Contents Locked**.

**Note: Selecting "Folder and Contents" will create a Recursive lock.*

4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Create a recursive lock on a folder

Recursive locks may only be created on folders if all content within that folder is unlocked. Creating this type of lock will lock not only the folder you are currently viewing, but also all sub-folders and content located within that folder.

1. On the **Document Manager** screen, **Right-Click** the selected folder.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock** screen, select **Folder and Contents Locked** for **Lock Status**.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

View whom has locked a file or folder

You must have write permission on a file or folder to perform the following:

1. On the **Document Manager** screen, **Right-Click** the selected file or folder.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock** screen, the following information will be listed:
 - a. Lock Status
 - b. Created by
 - c. Lock Type
 - d. Expires
4. Optionally, you may modify the **Lock Status** within this screen.
5. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Remove a lock on a file or folder

You must have write permission on a file or folder to perform the following:

1. On the **Document Manager** screen, **Right-Click** the selected file or folder.
2. Click the **Manage -> Lock Details** option.
3. Using the **Lock Status** drop-down menu, select **Unlocked** within this screen.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Identifying a Locked File or Folder

Within the Document Manager you have the option of viewing the Lock column. The Lock column provides the display name of the person whom has locked the file(s) or folder(s). If a Recursive Lock has been applied, the display name of the person placing the lock will be applied recursively as well.

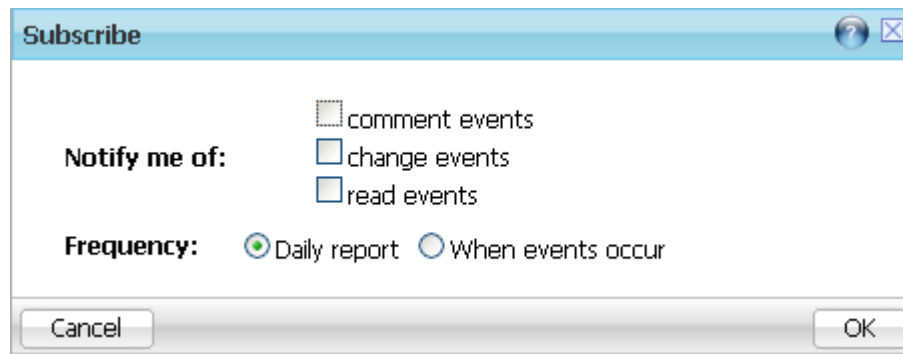
If the Lock column is not displayed within your Document Manager, click on the View button in order to add the column to your current display.

Subscriptions


Subscriptions automatically notify you when a file or folder has been viewed, changed, or commented. Subscription notifications are sent via e-mail either when the viewing, changing, or commenting occurs or at a certain time of day. Such notifications are known as subscription reports. The type of report (view, change, or comment) and frequency of the report is determined when the subscription is created.



Creating Subscriptions



(Figure 3.0.6)

1. On the **Document Manager** screen, **Right-Click** the selected file or folder.
2. Click the **Subscribe** option.
- OR -
On the **Document Manager** screen, place a checkmark in the box associated to the file or folder, and then click the **Subscribe**  button.
3. Place checkmarks in the boxes associated to the notification events of your choice.
4. Choose the **Frequency** of the report as either when the event occurs for an immediate notification or "Daily Report" which sends all notifications for all of your subscriptions at once.
5. Click **OK** when you are done creating your subscription.

**Note: If choosing the "Daily Report" option for your subscription, the time of day the daily report is sent is pre-determined by Xythos.*



Using Subscriptions

View existing Subscriptions

1. Navigate to the **Document Manager** screen.
2. **Right-Click** on the file or folder of your choice.
3. Select **Manage -> Subscriptions**.
4. All subscriptions for this file or folder will be listed.


Cancel existing Subscriptions

1. Navigate to the **Document Manager** screen.
2. **Right-Click** on the file or folder of your choice.
3. Select **Manage -> Subscriptions**.
4. Place a checkmark in the box associated to the Subscription.
5. Click the **Unsubscribe** button to remove the Subscription.

View all of your existing Subscriptions system wide

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Subscriptions** tab.

Unsubscribe / Cancel an existing Subscription

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Subscriptions** tab.
4. Click on the associated **unsubscribe**  button.

Automatic cancellation of a Subscription or notification

Subscriptions and their notifications are also automatically canceled due to certain changes within the system. If the subscribed file or folder is deleted, the subscription is automatically canceled.

If the permissions of a file or folder are changed such that the current subscriber no longer has the correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

RSS Feed

Xythos allows you to create a Really Simple Syndication (RSS) feed to any folder, file or search results listing. RSS feeds are commonly used to publish frequently updated content. You must use a 'reader' or 'aggregator' to access the feed once you subscribe to it. Readers retrieve and present the most recent content to you.

You may share your feed URLs with other users; however sharing access still applies. For example, if you share a feed URL to a user who does not have **read** access to those files or folders, they will not be able to properly view the RSS feed. Suppose you subscribe to a folder to which both you and another user have **read** access. However, the content within that folder is only readable to you; the other user does not have **read** access on that content. When the other user accesses that feed, the user will be allowed to see the feed but there will be no content displayed.

Upon accessing a URL feed, you may be prompted to login.

Search results are also dependent upon your sharing access. For example, if a user is searching for "flower" and the search results are "daffodil", and "iris"; however, the user does not have access to "iris", then they will only see the result for "daffodil".

You may also share a feed URL with users who do not have an account on Xythos. If there is read access granted to **Public** for that particular file or folder, any user will see that content through the RSS feed no matter if they are logged in or not. All authenticated users are any users whom have logged into their account are considered "All authenticated users". Non-Xythos users will require a ticket rather than a link.

Normally, RSS feeds are of the format:

`https://www.xythos.com/<folder_path>/_xy-rss-<search_results_name>`


To share this URL with public users, edit the URL to be:

`https://www.xythos.com/<folder_path>/_xy-rsspub-<search_results_name>`

Note: when subscribing to a file, the feed shows any new versions created for that file. Therefore, you should only subscribe to feeds for those files which are **versioned. Otherwise, the content of the feed will never change.*

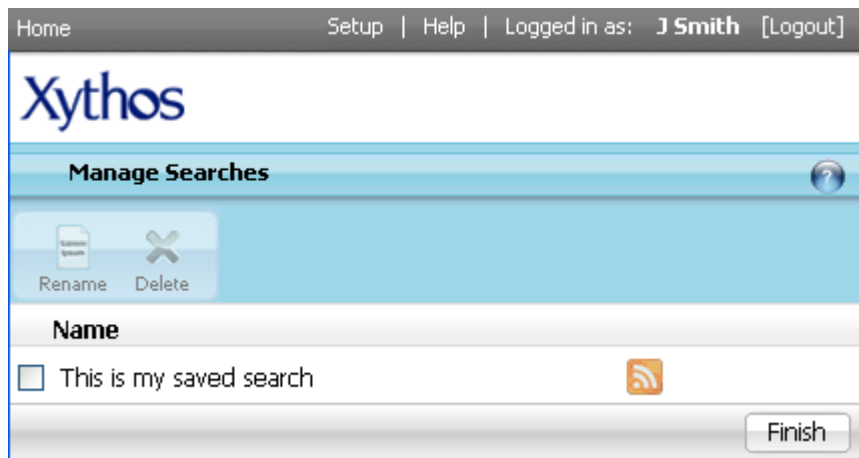


Subscribe to an RSS feed for a file or folder



1. Navigate to the **Document Manager** screen.
 2. Navigate to the file or folder of your choice.
 3. Place a checkmark in the box associated to the file or folder, and then click the **RSS**  button.
- OR -
4. **Right-Click** the file or folder's name, and then select **Create RSS Feed**.
 4. Follow your browser's instructions on how to create the RSS feed.



Subscribe to an RSS feed for a search



(Figure 3.0.7)

1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
 2. Click on the **Manage Searches** link.
 3. The Manage Searches screen will open and all currently saved searches will be listed by name.
4. Click the **RSS**  button associated to the search of your choice.
 5. Follow your browser's instructions on how to create the RSS feed.

IV: Share and Interact Securely Inside the Organization

Searching


Quick Search

Quick Search (see *figure 1.0.3*) allows you to search for a file based on its name and, if your system is configured to do so, its content. Search allows you to search for a file based on the file's properties as well as content and name.

1. Type in a partial or full name into the search box.
2. Click the **Search** button, or press **enter**.



Search

1. Click the  **Expand** button to the right of the search button.
- 2.


The File or Folder Name	Using the drop-down menu, select either Name "Contains" or "Equals". Enter the word in the Name field that you wish to find.
File Content Contains	Enter in the word(s) in the Content field that you wish to find.
Conditions	"Where all these conditions are met" or "Where any of these conditions are met"
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".

3. Click **Search**

The search results display a list of the files matching your criteria. From here, you may open the file or perform other options (e.g. Save Search) with the available buttons.





Save a search

1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search**  button.
5. Within the **Save Search** window, supply a name for the search.
6. Click **OK**.



Save search results

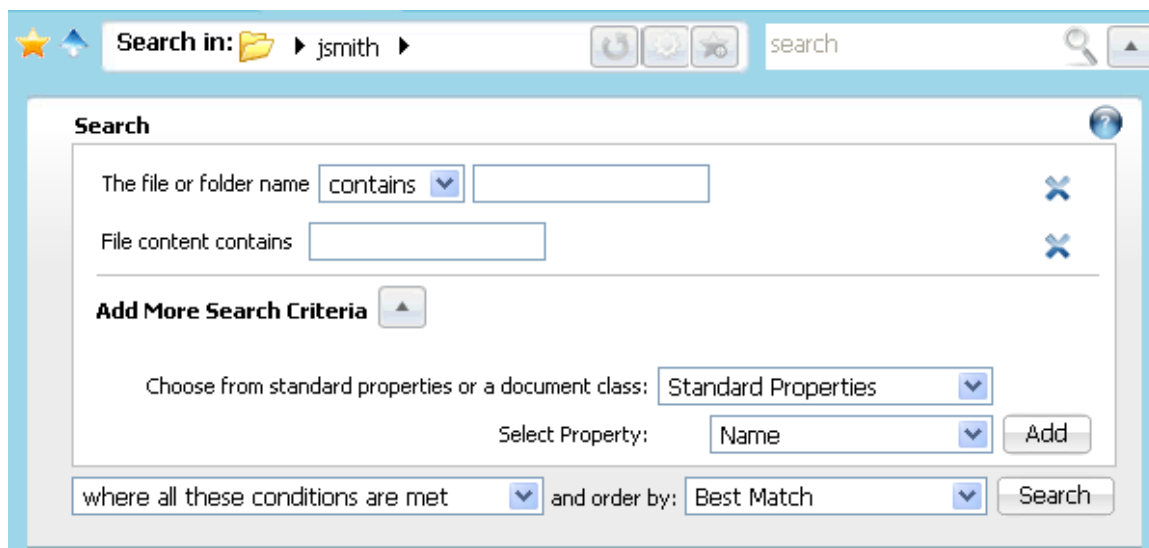
1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search Results**  button.
5. Within the **Save Search Results** window, provide a name for the file and determine the location in which to save it.

6. Use the  **Expand** button in order to view your folders. Click on the folder in which you would like the file saved.
7. Click **OK**.





Advanced Search

Advanced Search allows you to search for a file based on standard file properties, file classification properties or a combination of those properties.



(Figure 4.0.0)

1. Click the  **Expand** button to the right of the **search**  button in order to specify the search criteria.
- 2.

File or Folder Name	Using the drop-down menu, select either Name "Contains" or "Equals". Enter the word in the Name field that you wish to find.
File Content Contains	Enter in the word(s) in the Content field that you wish to find.
Standard Properties	Using the drop down menu, select from the available standard properties such as Tags, Owner, Name, etc.
Document Class Properties	Using the drop down menu, select from the available document classes and their properties as specific to your environment.
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".


3. Click the **Add Criteria** button.
4. You may select from standard file properties and predefined Document Class properties.
5. Select the appropriate file property and or document class in which to search and the associated criteria.
6. Click the **Add Criteria** button in order to add additional search criteria.
7. Using the drop-down menu, specify either **"Where all these conditions are met"** or **"Where any of these conditions are met"**.

8. Using the drop-down menu, specify either **Order by** "Best Match" or "Most Recently Modified".
9. Click the **Search** button.




Saved Search

Within Xythos you may create, modify and visit your searches at any time. Not only the search results may be saved, but also the search itself. If you know that each month you must perform a search based on content or classification properties, you need only use the existing saved search.

1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Any currently saved searches will be listed by name.
3. Click on the **saved search** of your choice in order to initiate the search.
4. The search screen will open with the results of your saved search criteria.
5. *Optionally, you may now use the **Save Search** or **Save Search Results** buttons.*

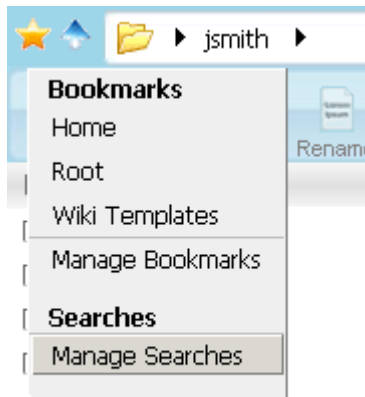


Last Search


1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Click on the **Last Search** link.
3. The search screen will open and your last search along with any results will be listed.
4. *Optionally you may now use the **Save Search** or **Save Search Results** buttons.*





Manage Searches



(Figure 4.0.1)

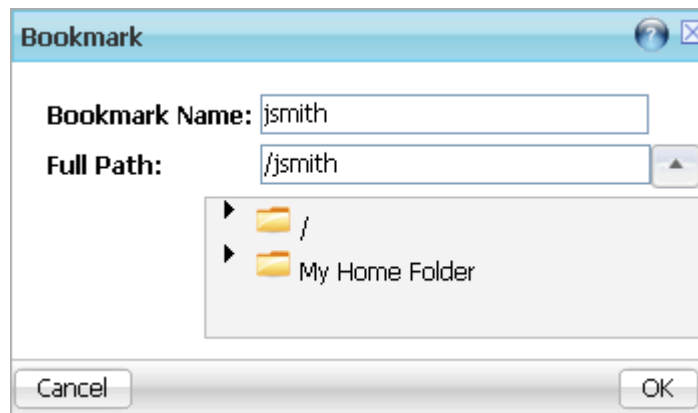
1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Click on the **Manage Searches** link.
3. The Manage Searches screen will open and all currently saved searches will be listed by name.

4. Rename or Delete the saved search by placing a checkmark in the box associated to the saved search, and then clicking either the **delete**  or **rename**  button.
5. Click the **Finish** button to exit the screen.

Bookmarks

Bookmarks are shortcuts to folders and files within your Xythos account. Using Bookmarks, you can conveniently create shortcuts to your most frequently accessed folders and files. You can also create shortcuts to other users' folders and files you have been allowed to access.


You may navigate to your bookmarks at any time by clicking on the **Bookmarks** button. In order to bookmark a file or folder, you must have **read** access to that file or folder. Once you bookmark a file or folder, it will be available each time you login to your account and click on the **Bookmarks** button.




(Figure 4.0.2)



Creating Bookmarks

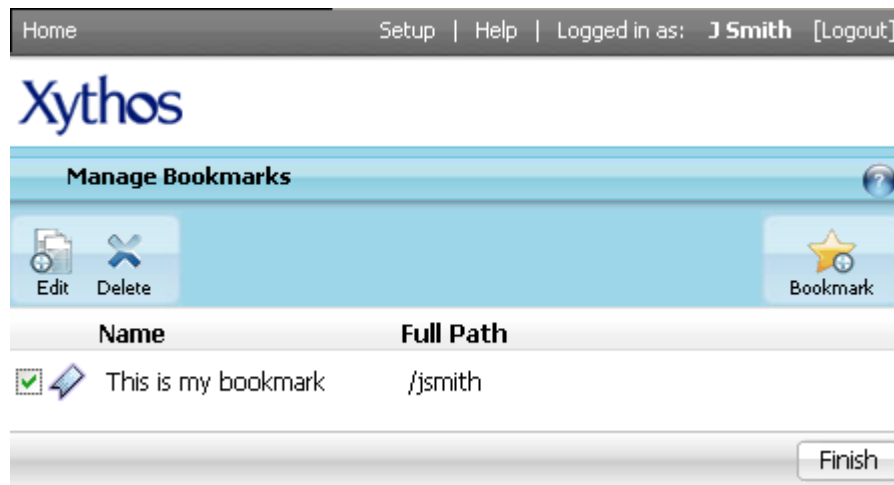
1. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Create a Bookmark**  button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Bookmark** option.
2. Provide a name for the Bookmark.
3. Provide the Full Path of the file or folder.

**Note: This will be provided for you if you have selected the file or folder first.*

Optionally use the **Expand**  button to browse to the Full Path of the file or folder.

4. Click **OK**.

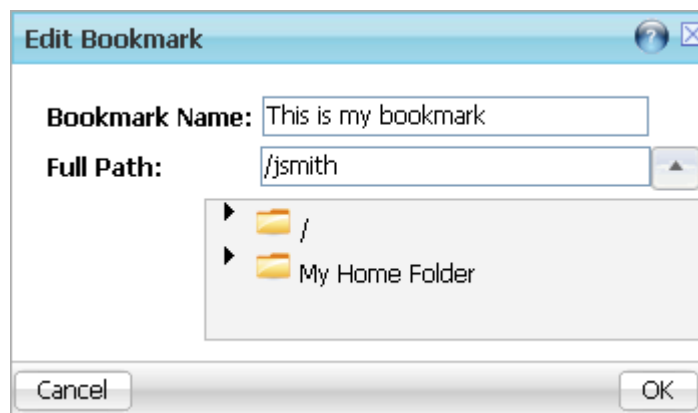
Using Bookmarks





(Figure 4.0.3)





Edit a bookmark



(Figure 4.0.4)

1. On the **Document Manager** screen, click the **Bookmarks and Searches**  icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to modify, and then click the  **Edit** button.
3. Modify the **Bookmark Name** and/or the **Full Path**
4. Click **OK**.

Delete a bookmark

1. On the **Document Manager** screen, click the **Bookmarks and Searches**  icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to delete, and then click the  **Delete** button.
3. The Bookmark will be immediately deleted.




Share Wizard


The **Sharing Wizard** guides you through sharing and notifying users. You may follow each step of this wizard, skip through to the desired step or end the wizard at any time.

Xythos

The screenshot shows the 'Choose Users' step of the Xythos Share Wizard. At the top, a breadcrumb path reads 'jsmith > This is a Folder >'. Below this is a progress bar with three steps: 'Choose Users' (active), 'Verify Permissions', and 'Send Email'. The main title 'Choose Users' is displayed in a blue header bar. An information icon and text state: 'This wizard steps you through setting Permissions to share to and, optionally, Email folders and files with users and groups.' The instructions read: 'To share with users or groups, enter the user's or group's name or email address. To share with users outside of the system, enter that user's email address.' A large empty text box is provided for input. Below the box, it says 'Separate users by commas or semicolons.' A 'Search for Users' button is located below the text box. At the bottom of the window are 'Cancel' and 'Next' buttons.

(Figure 4.0.5)

1. Within the **Document Manager** put a checkmark in the box associated to the file or folder you would like to share.
2. Click the **Share**  button or Right-click on the file or folder and select the **Share** option.
3. You are now in the **Sharing Wizard**.
4. You will be brought to the **Choose Users** screen.
5. Either begin typing in the user information in the box provided, or use the find utility.
6. Click the **Next** button.


jsmith > This is a Folder >

Choose Users
Verify Permissions
Send Email

Verify Permissions

Defined the type of access other users will have.


Name	Type	Viewer (Read-Only)	Contributor (Read, Write,) (Delete)	Full Access (Read, Write,) (Delete, Administer)	Other...
Mary Snow (msnow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Henry Jenkins (hjenkins)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
admin group	Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Tony Crow (tcrow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

☒ Apply the changed permissions to this folder as well as its sub-folders and files.
☐ Apply the changed permissions to this folder only.

Cancel
Back
Next
Finish

(Figure 4.0.6)

7. Select your preferred sharing options.
8. You may select the following options: Viewer, Contributor, or Full Access.
9. If you are currently setting sharing permissions on a folder, rather than a file you will need to determine whether this access should apply to the current folder only, or this folder and all sub-folders by clicking on the appropriate radio button.
10. *Optional: Click **Finish** to skip the Email portion and exit the Wizard.*
11. Click **Next**.


 ▶ jsmith ▶ This is a Folder ▶


Choose Users Verify Permissions Send Email

Send Email

You may edit the text surrounding the table of files only. File links will be added once the email is sent.

☒ Send the below email when I click Finish

Mary Snow (msnow@xythos.com) ✕ Henry Jenkins (hjenkins@xythos.com) ✕
 To: (all the members of) admin group ✕ Tony Crow (tcrow@xythos.com) ✕
 Subject: J Smith has shared some resources to you



The following has been shared to you.

File	Subscribe to and/or Bookmarks
Your list of files will be added to this table once you send this email.	

Thank you,
J Smith

☐ Also send the email to me (J Smith)

Cancel Back Finish

(Figure 4.0.7)

12. You will be brought to the **Email** screen.
13. Create an email to notify users of the new share.
14. *Optional: Click **Back** to return to the previous step.*
15. Click the **Finish** button to exit the Sharing Wizard.

Permissions

By default, every item is created with 3 sets of permissions:

- **Owner** - You are the owner of the items within your own account.
- **Users with Accounts** - Any users, in your Organization or outside of your Organization, that have a Xythos account. Users must be logged in to their Xythos account in order to gain access to the files or folders.
- **Public** - Any user accessing the service without an account or those users with accounts who have not logged in. Use this option to make your files and folders public to the outside world.

Within the Document Manager, there is a column labeled **Shared To**. This column identifies the following:

- **"None"** This file or folder is not shared to any other user.
- **"Some"** This file or folder is shared with another user, but not all users.
- **"Everyone"** This file or folder is shared with either the **Public** or shared with all users with an account.

Xythos enables you to control access to your files in four different ways, represented by the four columns of permissions: Read, Write, Delete, and Administer.

Read Permission

Read permission allows the user or **Group** of users to view the file or folder only. If a user is granted **Read** access on a folder, they are not automatically granted **Read** access to all of the folder's contents. The user will only have access to view the folders, sub-folders and files to which you have implicitly granted them access.

Write Permission

Write permission allows the user or **Group** of users to write to the file or folder only. Write access includes the following: viewing, editing, renaming both the contents and options of the file or folder. If a user is granted **Write** access on a folder, they are not automatically granted **Write** access to all of the folder's contents. The user will only have access to write to the folders, sub-folders and files to which you have explicitly granted them access.

Delete Permission

Delete permission allows the user or **Group** of users to move the file or folder to the trash. If a user is granted **Delete** access on a folder, they are not automatically granted **Delete** access to all of the folder's contents. The user will only have access to delete the folders, sub-folders and files to which you have explicitly granted them access.

Administer Permission

Administer permission allows the user or **Group** of users full access to a file or folder's **Manage/Summary** screen and the permission to make modifications to all "Manage" items. If a user is granted **Administer** access on a folder, they are not automatically granted **Administer** access to all of the folder's contents. The user will only have access to administer the folders, sub-folders and files to which you have explicitly granted them access.

Basic Permissions

The screenshot shows a dialog box titled "Permissions for /jsmith/My New Folder". It has two tabs: "Basic Permissions" (selected) and "Advanced Permissions". At the top right are buttons for "Add User/Group" and "Overwrite Permissions". Below these is a table with columns: "Name", "Type", "Viewer (Read-Only)", "Contributor (Read, Write, Delete)", "Full Access (Read, Write, Delete, Administer)", and "Other...". The table lists four entries: "Owner (J Smith (jsmith))" (User, Full Access checked), "Authenticated Users" (Group, all permissions unchecked), "Public" (Group, all permissions unchecked), and "This is a Group" (Contact List, all permissions unchecked). At the bottom left are "Remove Access" and "Apply" buttons, and at the bottom right is an "Exit" button.

Name	Type	Viewer (Read-Only)	Contributor (Read, Write, Delete)	Full Access (Read, Write, Delete, Administer)	Other...
Owner (J Smith (jsmith))	User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Authenticated Users	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Public	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
This is a Group	Contact List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

(Figure 4.0.8)

1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Viewer, Contributor** or **Full Access** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

Advanced Permissions

The screenshot shows the "Advanced Permissions" tab of the same dialog box. It displays a grid of checkboxes for permissions: "Read", "Write", "Delete", "Administer", "Inherit Read", "Inherit Write", "Inherit Delete", and "Inherit Administer". The "Read", "Delete", and "Administer" columns have a checked checkbox in the first row. The "Inherit Read" column has a checked checkbox in the first row. The "Inherit Write" column has a checked checkbox in the first row. The "Inherit Delete" column has a checked checkbox in the first row. The "Inherit Administer" column has a checked checkbox in the first row. The "Read", "Write", "Delete", and "Administer" columns have unchecked checkboxes in the second, third, and fourth rows. The "Inherit Read" column has an unchecked checkbox in the second, third, and fourth rows. The "Inherit Write" column has unchecked checkboxes in the second, third, and fourth rows. The "Inherit Delete" column has unchecked checkboxes in the second, third, and fourth rows. The "Inherit Administer" column has unchecked checkboxes in the second, third, and fourth rows.

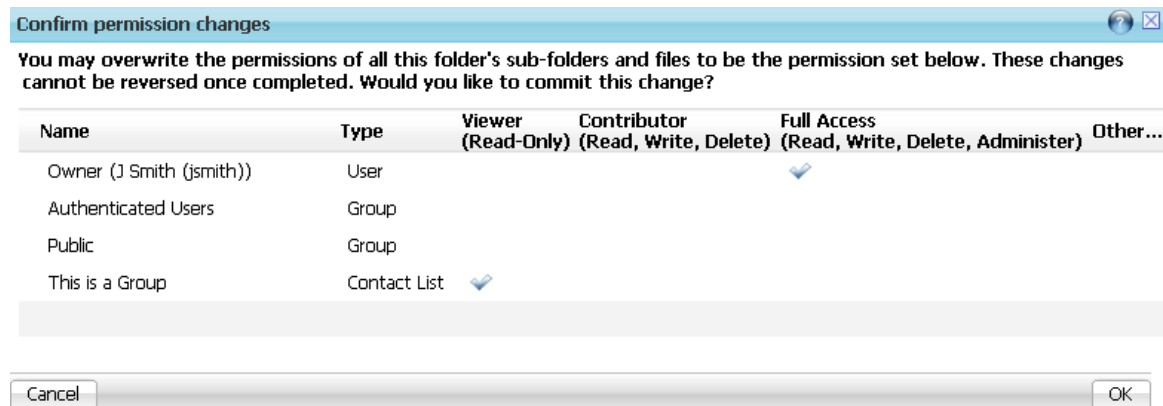
Read	Write	Delete	Administer	Inherit Read	Inherit Write	Inherit Delete	Inherit Administer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Figure 4.0.9)

1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Advanced Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Read, Write, Delete, Administer, Inherit Read, Inherit Write, Inherit Delete** or **Inherit Administer** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

Overwrite Existing Permissions

When modifying folder Permissions, by default, you are adding permissions to the existing permission set. In order to overwrite the existing permission set, you must click the **Overwrite Permissions** button. When the **Overwrite Permissions** button is used, then all previous settings will be erased for the current folder, all of the folder's sub-folders and files. These changes **cannot be reversed** once completed. This change applies to **all files and sub-folders located within the current folder, the current permissions of the files and sub-folders will be changed to match the current folder.**

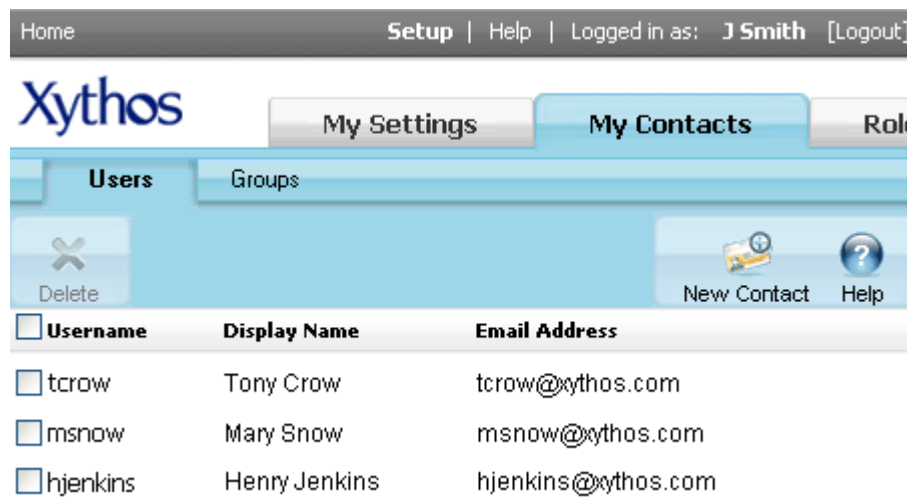


(Figure 4.1.0)

1. On the **Document Manager** screen, **Right-click** the selected folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab or the **Advanced Permissions** tab.
3. Set the folder and inherit permissions.
4. Click the **Overwrite Permissions** button.
5. Click the **Apply** button to confirm changes, or click **Cancel** to discard changes.

My Contacts

You may add contacts and groups to your account for ease in sharing and emailing other users. The groups which you create viewable only by you; however the administrator may have already created organization groups for use by everyone at your organization.



(Figure 4.1.1)

Contacts

You can share your files with other users who have Xythos accounts. You may share files and folders with users within your organization directly from the file or folder's Sharing page.



Add a new Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Click the **New Contact** button.
4. Using the Find utility, you may locate a user by Name or Email from within your Organization.
5. Enter in the search criteria, and then click **Find**. If you would like all users in your organization listed, leave the "Find User" field blank.
6. All users matching your search criteria will be listed. Highlight the user you would like to add as a contact, and then click **Ok**.

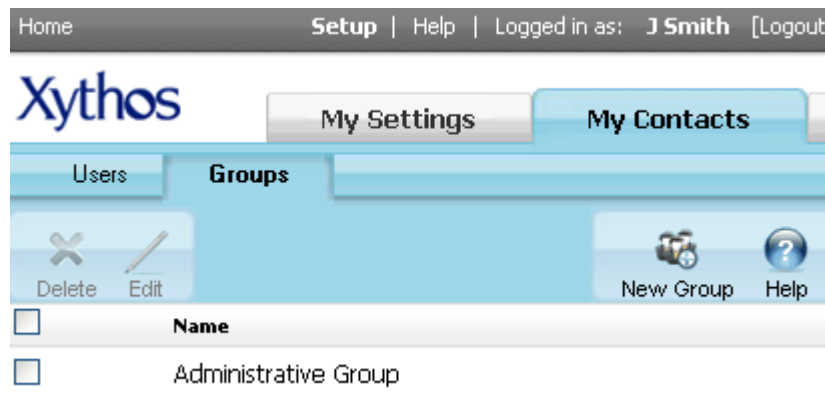


Delete a Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Place a checkmark in the box which corresponds to the Contact(s) you wish to delete.
4. Click the **Delete** button. The Contact is immediately and permanently deleted.

Groups

You may sometimes wish to make your files available to a customized *Group* of users rather than to individual users or to the entire "Public". Groups are a convenient way for you to organize groups of users that need to access the same files. By granting the Group permission to access a file or folder, you allow every user in that group to access it.




(Figure4.1.2)



Add a new Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click the **Groups** tab.

4. Click the **New Group**  button.
5. Provide a **Name** for the Group, and then click **Next**.
6. Use the **Find** feature to locate users.
7. Select the users you wish to add, and click the **Add Selected Users** button. Repeat this process for each of the users you wish to add.
8. Click the **Save** button when you have completed configuring your **Group**.



Add or remove users for an existing Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click on the **Groups** tab.
4. Place a checkmark in the box associated to the group you wish to modify, and then click the **Edit** button.
5. Place a checkmark in the box associated to the user(s) you wish to remove from the group, and then Click the **Delete** button. Click the **Add Member** button if you wish to add additional users to the group.
6. Click the **Exit** button when you have completed configuring your **Group**.

V: Share and Interact Securely Outside the Organization

Email

Using Xythos, you can send links to files, instead of sending the files themselves, which is both faster and saves unnecessarily wasted disk space. There is no need to make duplicate copies of a single file when you simply send a link to the original file. In this manner, every user is always looking at the most recent version of the file (see figure 4.0.7).

Method for sending email

The method for sending email may or may not be available, depending on your environment's configuration. If enabled, you have the option to select either Xythos Web-based Email Solution or My Default Email Client from within your My Settings screen.

Selecting the "Xythos Web-based Email Solution" will use the email screens within the web view. Selecting the "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending email. You must select your true default email client. If, for example your default email client on your computer is Microsoft Outlook and you set your Default Email Client in Xythos to Lotus Notes, Microsoft Outlook will be launched. Selecting the incorrect email client can cause unfavorable results.

The email screens are dependant upon the method you have selected. When using your default email client, you will be prompted to provide information based on your selections.

Xythos Web-based Email Solution

Send Email

i You can notify users that you have shared folders and files to them by typing in users' display names, group names or email addresses, separated by commas or semicolons, into the **To:** text box. You may edit the text surrounding the table of files only. File links will be added once the email is sent.

To:

Subject: J Smith has shared some resources to you

The following has been shared to you.

File	Subscribe to and/or Bookmarks
Your list of files will be added to this table once you send this email.	

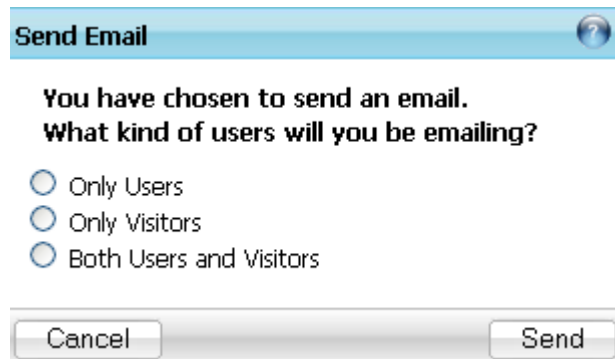
Thank you,
J Smith

☐ Also send the email to me (J Smith)

Cancel Send

(Figure 5.0.0)

My Default Email Client

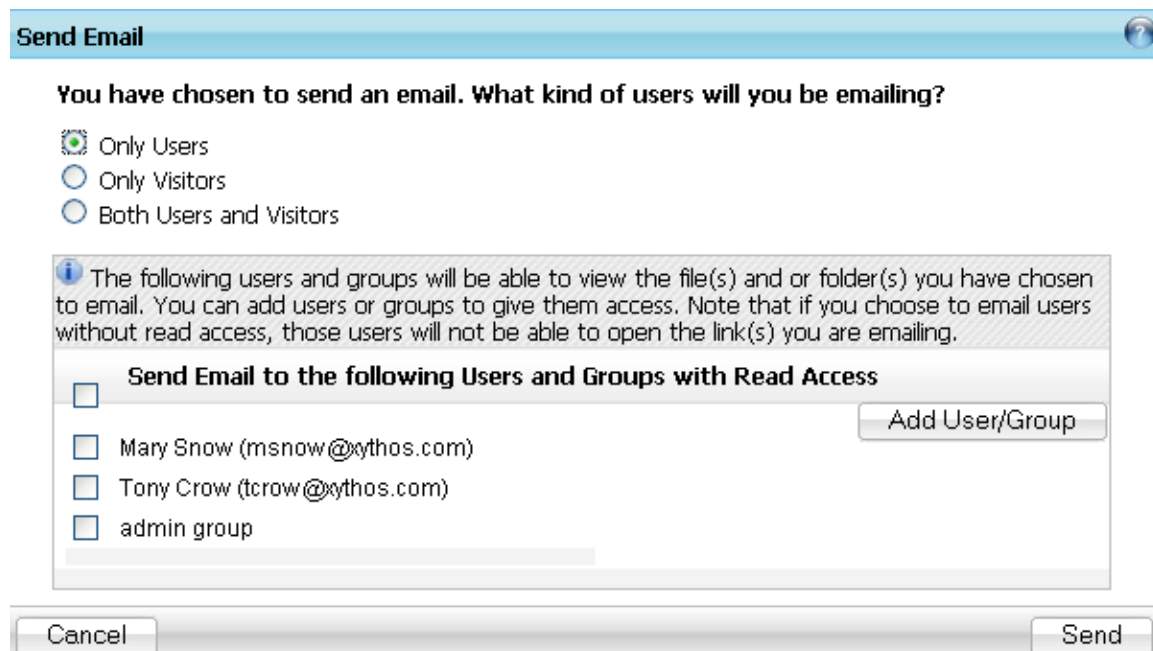


Send Email

You have chosen to send an email.
What kind of users will you be emailing?

☐ Only Users
☐ Only Visitors
☐ Both Users and Visitors


(Figure 5.0.1)



Send Email

You have chosen to send an email. What kind of users will you be emailing?

☒ Only Users
☐ Only Visitors
☐ Both Users and Visitors

 The following users and groups will be able to view the file(s) and or folder(s) you have chosen to email. You can add users or groups to give them access. Note that if you choose to email users without read access, those users will not be able to open the link(s) you are emailing.

☐ **Send Email to the following Users and Groups with Read Access**

☐ Mary Snow (msnow@xythos.com)
☐ Tony Crow (tcrow@xythos.com)
☐ admin group

(Figure 5.0.2)

Send Email

You have chosen to send an email.
What kind of users will you be emailing?

☐ Only Users
☒ Only Visitors
☐ Both Users and Visitors

*Ticket Options

By default, a 30-day ticket without a password will be created for users outside of the system. To change those settings, open Ticket Options.

Cancel

Send

(Figure 5.0.3)

Send Email

You have chosen to send an email. What kind of users will you be emailing?

☐ Only Users
☐ Only Visitors
☒ Both Users and Visitors

The following users and groups will be able to view the file(s) and or folder(s) you have chosen to email. You can add users or groups to give them access. Note that if you choose to email users without read access, those users will not be able to open the link(s) you are emailing.

☐ Send Email to the following Users and Groups with Read Access

☐ Mary Snow (msnow@xythos.com)
☐ Tony Crow (tcrow@xythos.com)
☐ admin group

Add User/Group

*Ticket Options

By default, a 30-day ticket without a password will be created for users outside of the system. To change those settings, open Ticket Options.

Cancel


Send

(Figure 5.0.4)

59



Email users to indicate shared resources

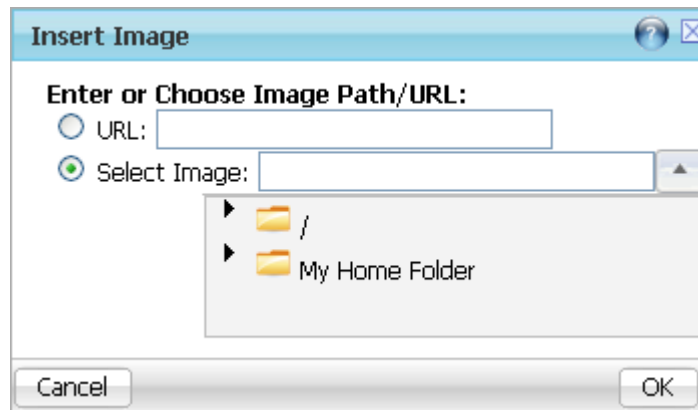
1. Navigate to the intended file or folder.
2. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Email**  button.
- OR -
- On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Email** option.
3. If you would like to email additional users, click the **To** entry box, you may start typing a user's **Display name**, their **username**, a **Group name**.
4. Separate users/groups by commas or semicolons. Or, you may click the **To** button to Find and add *users* or *groups*.
5. You may then edit the subject and body of the notification e-mail as you wish. Note that there is a place holder for the link(s) to the file(s) and/or folder(s). Once you send the e-mail, this place holder will be replaced with the appropriate link(s).
6. Click **Send** to send the e-mail.

Inserting Images and Links

When using the email feature, you have the ability to add not only text, but also images and links.




(Figure 5.0.5)



(Figure 5.0.6)





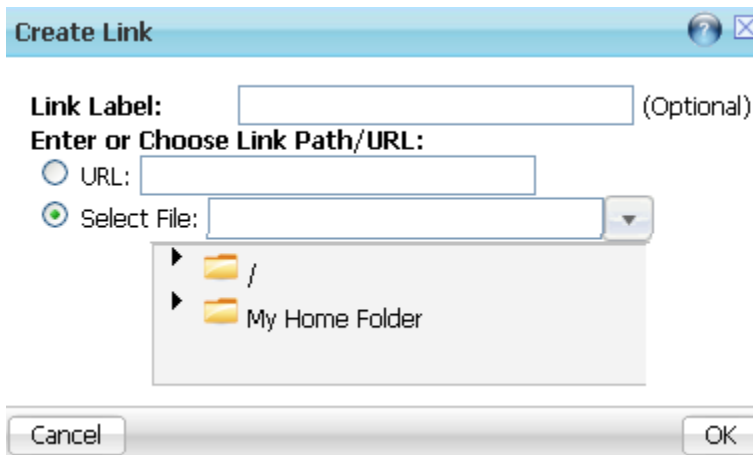
Inserting an image from a website

1. Navigate to the Email screen.
2. Click the **Insert Image**  button.
3. Click the radio button to the left of the URL field.
4. Type in the full location of the image. For example: <http://www.xythos.com/picture.jpg>
5. Click **Ok**.
6. You will be returned to your email, where the image has now been added directly into the body of the email.



Inserting an image from your Xythos account


1. Navigate to the Email screen.
2. Click the **Insert Image**  button.
3. Click the radio button to the left of the Select Image field.
4. If you know the exact name and location of the image, you may type it in the Select Image field, otherwise click the  Expand icon.
5. Your folder structure will be listed and you may navigate to the image file.
6. Click the name of the file in order to select the image.
7. Click **Ok**.
8. You will be returned to your email, where the image has now been added directly into the body of the email.



(Figure 5.0.7)




Inserting a link from a website


1. Navigate to the Email screen.
2. Click the **Insert link**  button.
3. *Optionally type in the link label. For example: My Website.*
4. Click the radio button to the left of the URL field.
5. Type in the full location of the file or folder. For example: <http://www.xythos.com/file.doc> or <http://www.xythos.com/>
6. Click **Ok**.
7. You will be returned to your email, where the link has now been added directly into the body of the email.

**Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full URL.*



Inserting a link from your Xythos account

1. Navigate to the Email screen.
2. Click the **Insert link**  button.
3. *Optionally type in the link label.*

4. Click the radio button to the left of the Select File field.
5. If you know the exact name and location of the file or folder, you may type it in the Select File field, otherwise click the  Expand icon.
6. Your folder structure will be listed and you may navigate to the file.
7. Click the name of the file or folder in order to select it.
8. Click **Ok**.
9. You will be returned to your email, where the link has now been added directly into the body of the email.

**Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full location on Xythos.*

What happens when this e-mail is received?

If you have selected the option **Both users and visitors**, a link will be sent which will prompt the user to login, or allow the visitor to continue. Although you may access the shared files without logging in, it is encouraged to login if you are a user in the system so that you may have all appropriate permissions.



The image shows a dialog box titled "Xythos" with a subtitle "Login Options" and version "v 7.1.18.15". It is divided into two sections: "Users" and "Visitors". The "Users" section contains fields for "Username:" and "Password:", followed by a "Login and View Shared Files" button. The "Visitors" section contains the text "If you are not a user of the system, you may view the shared files as a visitor." and a "View Shared Files" button. At the bottom, there is a copyright notice: "© Copyright 2003 - 2008 Xythos Software, Inc. All rights reserved."

(Figure 5.0.8)

Tickets

Tickets allow both non-Xythos and Xythos users access to your files and folders. By using the ticket functionality, you may allow specific access to your folders, their sub-folders, and the files within. A folder ticket can be thought of as a direct online link to a folder. The person with whom you'd like to grant access to the file or folder will receive an e-mail with the online link. When the link is clicked, the user is taken to the Xythos interface and the folder's file and sub-folder listing displays just as you would see it in its regular folder listing screen. Tickets can be created for one file or folder, or any combination of multiple files and multiple folders.

When granting access to files and folders through tickets, you must define the type of access or permissions the user(s) should receive. In addition to setting access/permissions for your ticket, you may also password protect the contents. When the user receives the ticket link via e-mail, they will be prompted for a password when attempting to access the link. If a user is granted *Read and Write* permission for a ticket, however they are not provided the password then they will not be able to access the contents of the ticket.



(Figure 5.0.9)

Create a ticket

1. On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Manage -> Tickets** option.
- OR -
On the **Manage** screen, select the **Tickets** link.
2. Click the **Create Ticket** button.

New Ticket for: /jsmith/This is a File.jpg

Define Permissions: ☒ Viewer (Read-Only) ☐ Contributor (Read, Write, Delete)

Lifetime: ☒ Limited to: 30 day(s) ☐ Unlimited

Name: Ticket For /jsmith/This is a File.jpg

☐ **Password Enable this Ticket**

Ticket Password: Not assigned

Ticket Password: (Optional)

Confirm Password:

Cancel OK

(Figure 5.1.0)

3. A new window will appear with default ticket values. You may modify the following:
 - a. Permissions
 - b. Lifetime
 - c. Name
 - d. Password
 When you are satisfied with the values, click **OK** to create the ticket.
4. The ticket is now listed in your **Tickets** screen. You may copy and paste the URL of the ticket into your preferred email client, or simply place a checkmark in the box(es) corresponding to the ticket(s) and click the **Email** button.
5. You may edit any of your tickets by returning to the ticket screen.

Default Ticket Values

If choosing to accept the default values of a ticket, your ticket has the following default properties:

Property	Default Value	Available Values
Permissions	Viewer (Read Only)	<i>Viewer (Read Only)</i> or <i>Contributor (Read, Write and Delete)</i>
Lifetime	30 days	1 minute to an unlimited time
Name	System-determined. The default name is "Ticket For <folder_name><file_name><appended_number>" where <folder_name> is the folder's name, <file_name> is the file's name, and <appended_number> is an appended number should there already be a ticket by this name	Any name that has not already been used for another ticket
Password	none	Passwords may be any length

What happens when I e-mail this ticket?

If you have created a ticket in the above manner and have clicked the **Email** button, an e-mail message is automatically created with the link. From here, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, he/she will be able to click on this link and see the folder listing or open the file, depending on whether the ticket was created for one or more files or one or more folders.

The user will be able to perform functions according to the permissions granted on the ticket.

What happens when I send a password-protected ticket?

If you have created a ticket in the above manner, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, that user must enter the correct password before being granted access to the folder's listing or the file.

If the user enters the correct password, the folder listing or file will be displayed. If the user enters the correct password and is logged in as a Xythos user, that user will remain logged in and their folder listing will automatically refresh with the ticketed folder listing, or the file will automatically launch.

If the wrong password is entered, a message will display on the Xythos screen informing the user of the incorrect password. This screen will remain in the browser window until the user enters the correct password. There is no limit to the number of incorrect password attempts.

E-mail an existing ticket

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Email** button.
3. You will have the option of either e-mailing the ticket link, or the password enabled ticket link (if you enabled a password) by clicking on the associated button.
4. The web-based email solution, or your default e-mail client will open.
5. The full path and file name of the ticket will be listed, along with an intellilink which does not require a Xythos account to access.
6. Click the **Send** button in order to send the ticket.

**Note: Once you have finished composing the automatically-generated e-mail message, you may e-mail the link to any non-Xythos or Xythos user. If you have sent the password-protected link, you must separately provide your e-mail recipients the correct password.*

Edit/Retrieve a ticket's password

Note that if you are viewing the tickets of a shared resource, some tickets may be owned by users other than you. If such a ticket is listed, you will not be able to edit or delete that ticket and therefore, those two options will not be available for the respective ticket.

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Edit** button.
3. Type in a new **Password**, confirm the password, and then click the **OK** button.
4. Click the **Exit** button in order to exit the **Ticket** screen.

View all of your existing Tickets system wide

4. Click on the **Home** link in the top left of the main menu.
5. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
6. Click on the **My Tickets** tab.

VI: Xythos Applications (.xapp)

Dropbox

The purpose of a dropbox is to allow a user to add content without the ability to modify or remove the content once it has been added. There are two types of dropbox users -- the submitter and the administrator.

- **Administrator:** A dropbox administrator is a user which has either created the dropbox, or has been added as a dropbox administrator to an existing dropbox. This user has the ability to view, modify and delete any content located within the dropbox. The administrator may also close or open the dropbox to submissions.
- **Submitter:** A dropbox submitter is a user which has been added to the dropbox by the dropbox administrator. This user has the ability to add any content from either their local computer or from their existing account. The submitter may view any content they have added to the dropbox, however they may not modify or delete the content. There may be multiple submitters for each dropbox, however the submitters will only see their own files.

Submissions

When creating a new dropbox, the administrator may set the date on which the dropbox is available for submissions. If this date is left blank, submissions may be made immediately. The final submission date, or dropbox close date, may also be set.

With several submitters to a single dropbox, it is highly probable there will be files with the same name added to the same dropbox. If submitter "Sally" adds the file "bird.jpg", and the submitter "Steve" adds the file "bird.jpg" to the same dropbox, there will not be any type of conflict or renaming of the file. If, however, the submitter "Sally" adds the file "bird.jpg" and attempts to add another file "bird.jpg" to the dropbox, an error will be received. It is not possible to upload a file of the same name in an effort to replace the file. You must rename the file.

Permissions

Providing access to a dropbox should be done from within the dropbox wizard, or the dropbox manage pages. Similar to a wiki, access should not be granted through the traditional share and permissions pages for files and folders. If this should accidentally occur, open and save the dropbox. This resets permissions correctly.

Accessing a dropbox

The dropbox administrator may notify a user of dropbox access using either of two methods.

- **Copy link location:** Within the Document Manager, navigate to the location of the dropbox.xapp file of your choice. Right-click on the file, and then select the "Copy link location" option. You may paste this link into an email, or use it as a web link, etc. If this link is sent to a recipient whom is listed as neither an administrator or a submitter they will not be able to view the dropbox.
- **Dropbox details:** Navigate to the dropbox manage screen. Click on the dropbox details link, and then copy the dropbox location into an email, or use it as a web link, etc. If this link is sent to a recipient whom is listed as neither an administrator or a submitter they will not be able to view the dropbox.

Adding content

Similar to the file upload options in the webview, you have the ability to use either standard or advanced upload options. When using the advanced upload option, you must have Java 1.5 or newer installed.

Missing files in the dropbox

It is possible that a file you submitted to the dropbox a week, or a moment ago may no longer show up in the dropbox. Files may be moved by the dropbox administrator at any time. Your file is not missing, but rather moved to a location in which you do not have access.

Closed dropbox

A dropbox may be closed at any time by the dropbox administrator. If the dropbox is closed you may no longer submit content and should contact the dropbox administrator. When visiting a closed dropbox, it will be plainly displayed as "closed" and none of your content will be listed.



Creating a dropbox

New Dropbox

Title: Third quarter dropbox *

Description: Dropbox for third quarter items.

Auto Open Date and Time: 7/1/2008 12AM

Auto Close Date and Time: 10/1/2008 12AM

*Required Field

Cancel Next Finish

(Figure 6.0.0)

1. Navigate to the **Document Manager**.
2. Click on the **New Dropbox** button.
3. Provide a **title** for the dropbox. For example, you may specify a title such as "Fall 2008 Term Papers" or "John Smith Loan".
4. Optionally provide a **description**.
5. You may select a date and time when the dropbox will begin accepting files. If you do not specify a date and time, the dropbox will accept files immediately. Click on the **calendar** icon to select the date, and then use the drop down option to select the time. The time zone defaults to the administrator's time zone as set in their user settings.
6. You may select a date and time when the dropbox will no longer accept file submissions. If you do not specify a date and time, the dropbox will accept files until you either manually close the dropbox or specify an auto close date while managing your dropbox.
7. Click **Next**.
8. Use the find option to locate users and groups for which you wish to add access.
9. Once you have completed adding submitters, click the **Finish** button.
10. Click the **Launch** button in the confirmation screen to launch the new dropbox.

Administering a dropbox

Help | Logged in as: J Smith [Logout]

Xythos

Third quarter dropbox (Open until 10/1/08 12:00:00 AM PDT) Manage

Filter
Submitted by: All Submitted after: 12AM Submitted before: 12AM Apply Filter

Move Delete Refresh Close to Submissions

<input type="checkbox"/>	Name	Description	Size	Submitter	Submission Date
<input type="checkbox"/>	IMG_5309.JPG	Photo Assignment 1	29.9KB	Mary Snow	7/7/08 1:37:15 PM PDT
<input type="checkbox"/>	IMG_5347.JPG	Photo Assignment 2	39.4KB	Mary Snow	7/7/08 1:38:14 PM PDT

2 items Powered by Xythos

(Figure 6.0.1)

1. Navigate to the **Document Manager**.
2. Navigate to the dropbox you would like to manage.
3. Double-click on the file (e.g. my_dropbox.xapp) to launch the dropbox.

Managing a dropbox

Once the dropbox is created, you will be brought to the dropbox administration screen. As an administrator you will have the **manage** button which allows you to modify the details of the dropbox, add submitters and administrators to the dropbox.


Using a dropbox

Help | Logged in as: Mary Snow [Logout]


Xythos

Third quarter dropbox (Open until 10/1/08 12:00:00 AM PDT)

Dropbox for third quarter items.

**Upload Files**
Upload one or more files from your local computer to this dropbox.
Upload Files Now

OR ...

**Copy From Your Account**
Copy files directly from your account into this dropbox.
Copy Files Now

<input type="checkbox"/>	Name	Description	Size	Submission Date
<input type="checkbox"/>	IMG_5347.JPG	Photo Assignment 2	39.4KB	7/7/08 1:38:14 PM PDT
<input type="checkbox"/>	IMG_5309.JPG	Photo Assignment 1	29.9KB	7/7/08 1:37:15 PM PDT

2 items Powered by Xythos

(Figure 6.0.2)

Uploading files

1. Navigate to the dropbox, either by using a supplied link or through the document manager screen.
2. Click on the **Upload Files** button.
3. If you are using the advanced upload screen, you may drag and drop files and folders* directly from your local computer to the upload screen. If you are using the basic upload screen, click on the browse button to upload individual files; select the **Add File** button if you wish to add multiple files.
4. Click on the **Start Upload** button.
5. Click the **Next** button.
6. You will receive an "Upload Successful" notice, and may select **Finish** to if you do not wish to provide a description for the file. Click the **Next** button to add a description for the file.
7. Enter in the description, and then click the **Finish** button.
8. You will see the new file(s) in the dropbox.

Note: If you have opted to drag folders into the upload screen, all files will be placed into the dropbox in a single location. The folder and sub-folder structure will not be carried through, and it's possible you may encounter a name conflict should you have multiple files with the same name.

Copy files from your account

1. Navigate to the dropbox, either by using a supplied link or through the document manager screen.
2. Click on the **Copy From Your Account** button.
3. Optionally enter in a description for the file.
4. Type in the full path of the file or folder you wish to copy to the dropbox. If you are not certain of the location, use the expand icon in order to navigate to the file or folder you wish to copy to the dropbox.
5. Click the **OK** button.
6. You will see the new file(s) in the dropbox.

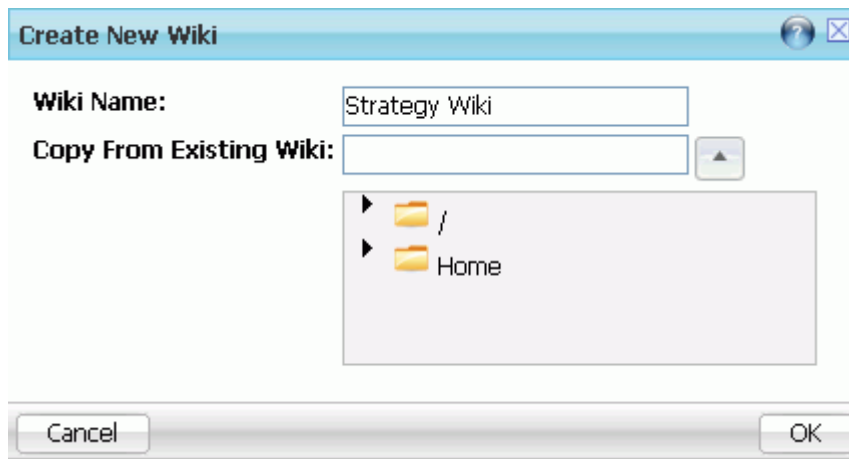
Wiki

Xyθος allows you to create a wiki. A wiki is, essentially, its own website that enables both you and properly permissioned users to add, remove, edit and change content. Wikis allow for linking among any number of pages. When you create a wiki using Xyθος, a folder which shares the name of your wiki is automatically created in your Document Manager.



Creating a Wiki

You have the ability to either create a new wiki, or use an existing wiki as a template. If you use an existing wiki, you will not be modifying the original file. All data from the existing wiki will appear and you may modify as necessary. It is recommended to create a generic wiki to use as a template for a department or group.



(Figure 6.0.3)

Creating a new Wiki

1. Click on the **New Wiki** button.
2. Specify a name for the Wiki.
3. Click the **Ok** button.
4. Click the **Launch** button in the confirmation screen to launch the new wiki.

Creating a wiki from an existing wiki

1. Click on the **New Wiki** button.
2. Specify a name for the Wiki.
3. Type in the exact location of the Wiki you wish to use as a template, or select the Expand icon.
4. If using the expand option, navigate to the Wiki you would like to use as a template.
5. Click the **Ok** button.
6. Click the **Launch** button in the confirmation screen to launch the new wiki.

Adding Content

Within a Wiki you must create content; that content is called a **Panel**. There are various different types of panels:

Text Editor	The text editor allows you to enter plain text. The editor's toolbar allows you to format that text using different font styles, bullets and more. The text editor also allows you to add images and links to external files.
Saved Search Results	The saved search results displays the resulting files found for the chosen search. The list of searches is your saved searches. To add an additional search, define it through the web view.
Upload Files	The upload files panel gives you the ability to upload files to the wiki. These files are then displayed in the panel as a list of the file names that are links to the actual files.



(Figure 6.0.4)

Create a Wiki Panel

After providing a name for the Wiki, you will be presented with panel options.

Text Editor Panel


1. Provide a name for the Panel (*Optional*).
2. Type content into the available box.
3. Use the available formatting buttons to modify the appearance of the Panel, and to add graphics and links.
4. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

When using a text panel, you may insert a saved search, or upload panel just as you would add an image or a link.

Saved Search Panel

1. Provide a name for the Panel (*Optional*)
2. Provide a description for the Panel.
3. Select an available saved search from the dropdown menu.
4. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

Upload Files Panel

1. Provide a name for the Panel. *(Optional)*
2. Click the **Add Files** button.
3. Use the **Upload** feature in order to add files.
4. Once the file(s) has been uploaded, specify a caption.
5. You may remove a file by clicking the delete  icon associated to the file.
6. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

Click any of the available tabs in order to continue configuring your Wiki, or click the Finish button if configuration is complete.

Sharing

1. Click the **Permissions** tab.
2. Add *users* and *Groups* as **Viewers** and **Contributors**.
3. Click the **Finish** button once all sharing configuration is complete.

Email

1. Click the **Email** tab.
2. Use the **To** button to add additional users. By default all users with whom you have shared this resource will be listed.
3. *Optionally specify a subject.*
4. *Optionally provide a personalized message.* Be certain to leave the "Wiki Link" item within the email so that the Wiki Link may be automatically generated.
5. Click the **Finish** button.

You may also create a more advanced Wiki in order to better meet your needs. Because of the user friendly interface, creating a robust Wiki is a quick and easy process.


Wiki

Discussion

History

Welcome to Strategy Six

Edit Panel



Team **Strategy Six** is a group of consultants specializing in business plan development, market strategy and research.

Team Members: *Please welcome Maria Miller as our newest team member.*

1. Paul Axelrod
2. Margot Hirsch
3. Keith Kohls
4. Colleen Malloy
5. Scott Quinn
6. Maria Miller

Current Projects:

No.	Project	Due	Status	Team Lead
1	Business Plan - Florals Inc.	Jan 15	50% complete	Margot
2	Pricing Strategy for Light Bulbs	Jan 30	25% complete	Keith
3	Competitive Analysis - Food Industry	Feb 15	Initiated	Scott

Customer Account and Billing Information: Use the following on demand services.

- [Salesforce.com CRM](#)
- [QuickBooks Online](#)

Forms: Common forms that we can all use.



- [Fax Cover Sheet](#)
- [Expense Form](#) - Please submit expense forms by end-of-month incurred

Last modified by Scott Quinn on 12/5/07 9:24:22 AM PST.

Samples of Strategy Six Projects

You may reference sections in these documents for use as best practices.

Edit Panel

-  /home/Webinar Org/Users/squinn/My Documents/My Pictures/Economic Analysis of Developing Countries.xls
-  /home/Webinar Org/Users/squinn/My Documents/My Pictures/Business Plan - Widgets Inc..doc

Last modified by Scott Quinn on 12/5/07 9:24:22 AM PST.

Templates

Edit Panel

-  Business Plan template.doc
For manufacturing industry
-  Market Research template.doc
Market share, growth and trends
-  Project Plan template.xls
Can be applied to projects of any length

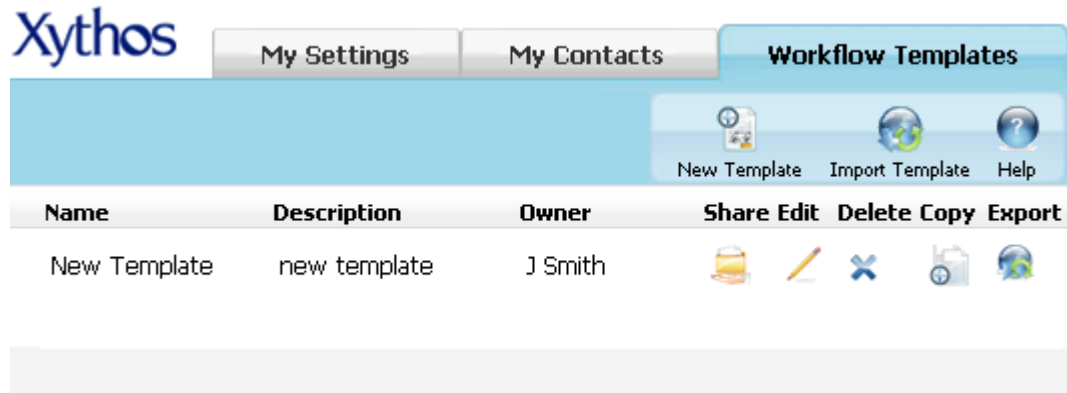
Last modified by Scott Quinn on 12/5/07 9:24:22 AM PST.

(Figure 6.0.5)

VII: Document Management

Setting up Workflow Templates

A workflow template is the definition of a specific workflow, assembled from a set of activities. Workflow templates may be shared, copied, imported, and exported. All workflow templates must have a unique name associated to them, and are created and managed within the Template Editor. Users can start workflows in the Document Manager by selecting the **Start Workflow** button or right-click menu option on a specific file or folder. When starting a workflow, the user will be able to choose from a list of all templates which have been shared to that user.



(Figure 7.0.0)



New Template

Template Details

Name: *

Description :

Owner:


Workflow Owner: ☒ Workflow Template Owner
☐ Workflow Initiator

Last Modified: (unknown user) Jan 10, 2008 11:35:00 AM PST

Send email notification of workflow progress to: ▼

Workflow Steps: There are currently no steps in this workflow template.
You must add at least one step before saving.

(Figure 7.0.1)

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click on the **New template**  button.
4. Define the required **name** for the workflow template. Optionally provide a description.
5. Using the radio buttons, determine the **workflow owner** as either the workflow template owner, or the workflow initiator.
6. The **last modified** information will be displayed, including the time, date, and display name of the user.
7. You may notify either the Workflow template owner, or the workflow template initiator by using the **Send Notification of Workflow Progress to** drop-down list.
8. Add **Workflow Steps** by clicking the **Add Step** button.
9. Use the above table to determine the steps you would like to add. You may add as many steps as you would like.
10. You may modify the order of the steps by clicking on the up and down arrows.
11. Click the **Save** button.

**Note: You may only select yourself as the owner of the template. You may not assign another user as the owner due to the permission based ownership which follows the*

template. Every action performed by the workflow will be performed in the security context of the template owner.



Import Template

Import Template

Please select the file to import:

(Figure 7.0.2)

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Import Template** button.
4. Click the **Browse** button to locate an XML file from your local computer.
5. Click the **Import** button.

**Note: If you import a template, you will be the owner of that template.*



Share Template

Add User/Group
 Remove User/Group
 Help

Permissions on: New Template

Permit these selected Users and Groups to:	Use	Administer
Owner (J Smith (jsmith))	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<Authenticated Users>	<input type="checkbox"/>	<input type="checkbox"/>
<Public>	<input type="checkbox"/>	<input type="checkbox"/>

(Figure 7.0.3)

Sharing a workflow template still requires that the user have the workflow ability.

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Share** button associated to the template you wish to Share.
4. Click the **Add User/Group** button to add users and groups.
5. Use the find feature in order to locate the user(s) and/or group(s).
6. Click the **OK** button.
7. Define the permission for each user and/or group using the available checkboxes.

When sharing a template, you may designate the permission as either **Use** or **Administer**.

Use	Administer
<ul style="list-style-type: none">• Cannot Share the template.• Cannot Edit the template.• Cannot Delete the template.• Can Copy the template. Once the template is copied, the user becomes the owner of the new template and may perform any and all actions on the new template.• Can Export the template.• Can assign the workflow to a file or folder and start the workflow, becoming the owner of that workflow instance.• Can stop the workflow instance.	<ul style="list-style-type: none">• Can Share the template.• Can Edit the template.• Can Delete the template.• Can Copy the template.• Can Export the template.• Can assign the workflow to a file or folder and start the workflow, becoming the owner of that workflow instance.• Can stop the workflow instance.



8. Click the **Apply** button.

**Note: You must have Administer privilege on the template in order to perform this action.*



Edit Template


See Figure 7.0.1

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Edit**  button associated to the workflow template you wish to modify.
4. You may modify all properties of the workflow template, including the name, owner and description.
5. Add **Workflow Steps** by clicking the **Add Step** button.
6. Use the above table to determine the steps you would like to add. You may add as many steps as you would like.
7. Remove **Workflow steps** by clicking on the  button for that step.
8. You may modify the order of the steps by clicking on the up and down arrows.
9. Click the **Save** button.

**Note: You must have Administer privilege on the template in order to perform this action.*



Delete Template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Delete**  button associated to the template you wish to delete.


4. You will be prompted **Do you really want to delete the template?** Select **OK** to delete or **Cancel** to abort the operation.

**Note: You must have Administer privilege on the template in order to perform this action.*



Copy Template


See Figure 7.0.1

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Copy**  button associated to the template you wish to copy.
4. Provide a **name** for the copied template.
5. Optionally modify any of the template's properties.
6. Click on the **Save** button.

**Note: If you copy a template, you are also the owner of the copied template.*



Export Template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Export**  button.
4. You will be prompted with the following question: **Would you like to include the template sharing settings in the exported template definition?** Click **Yes** or **No**.
5. Depending on your browser you will either be prompted to open the file, save the file or the file will open or be saved to your default download location.

Using Workflows

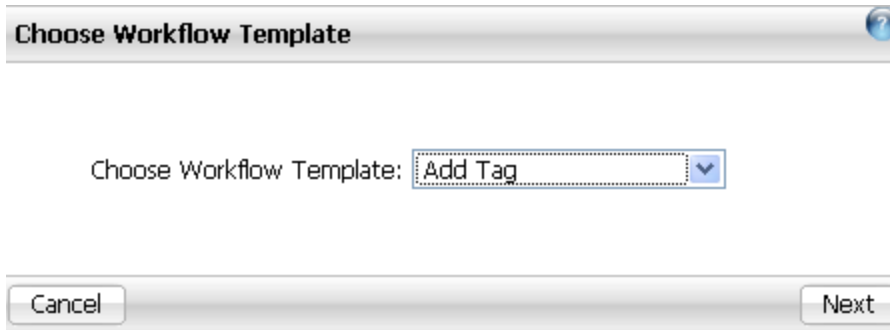
Workflow allows you to better manage and monitor the state of your documents with simple routing, including but not limited to reviews, approvals, and notifications. It allows the flow of work between users and/or departments to be defined and tracked.

All of the workflows you create are listed under Active Workflows and Workflow History. Workflows are created specific to a file or folder. You can create a workflow by choosing the Start Workflow option for a given file or folder. You can also configure a folder to automatically start a workflow any time a new file or sub-folder is created within that folder. All currently active workflows can be viewed from Active Workflows; completed workflows can be viewed from Workflow History. As there is no mechanism for deleting completed workflows, the list may be very long and therefore, viewing all completed workflows should be used sparingly.

Start a Workflow

Because a workflow is created on a specific file or folder, you must first navigate to that file or folder.

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Start Workflow**.
3. Select the **Workflow Template** from the drop-down menu.



(Figure 7.0.4)

4. Click the **Next** button.
5. Depending on the Workflow Template you selected, you may be required to define parameters such as **participant**, or you may be brought back to the manage screen.
6. Some workflow templates may allow you to select an option **Save this workflow and its parameters as a new template**. If you select this option, you must define a name for the template and optionally select a user to notify of the workflow progress.
7. Once all parameters are completed, click the **Next** button.
8. The running workflow will now be listed in your Manage **Active Workflows** screen.

Active Workflows

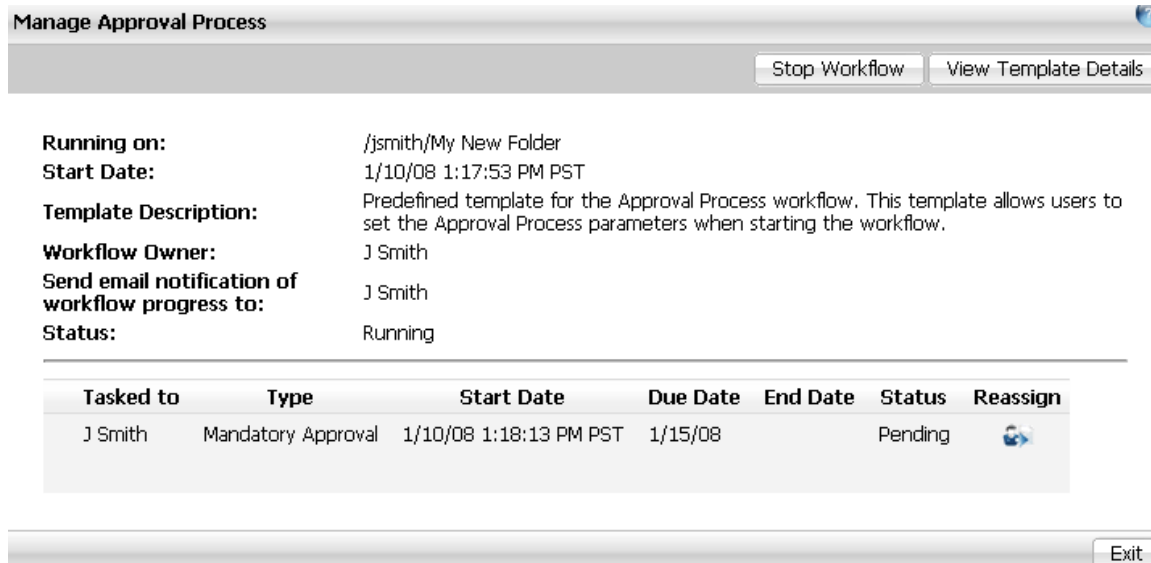
1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Active Workflows**.



(Figure 7.0.5)

Manage a Workflow

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Active Workflows**.
3. Select the active workflow you would like to manage.
4. Click the **Manage** button.

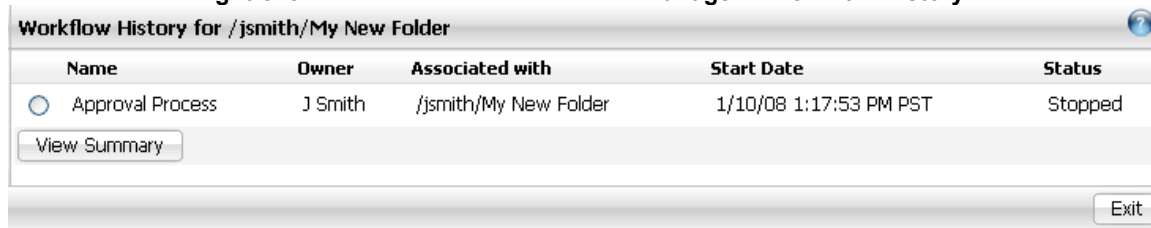


(Figure 7.0.6)

- From here you may **Stop the Workflow** or **View the Workflow Template Details**.

Workflow History

- Navigate to the **Document Manager** screen.
- Right-click** on the file or folder and select **Manage -> Workflow History**.



(Figure 7.0.7)

View Summary

- Navigate to the **Document Manager** screen.
- Right-click** on the file or folder and select **Manage -> Workflow History**.
- Click on the radio button associated to the Workflow you would like to View the Summary for.
- Click the **View Summary** button.

Manage Approval Process

View Template Details

Running on:

/jsmith/My New Folder

Start Date:

1/10/08 1:17:53 PM PST

End Date:

1/10/08 1:25:17 PM PST

Template Description:

Predefined template for the Approval Process workflow. This template allows users to set the Approval Process parameters when starting the workflow.

Workflow Owner:

J Smith

Send email notification of workflow progress to:

J Smith

Status:

Stopped

Reason:

Aborted by user {0}

Tasked to	Type	Start Date	Due Date	End Date	Status	Reassign
J Smith	Mandatory Approval	1/10/08 1:18:13 PM PST	1/15/08	1/10/08 1:25:17 PM PST	Not Completed	

Exit

(Figure 7.0.8)

Tasks

Tasks are the individual actions that are generated by a running workflow. All of the workflow tasks assigned to you, regardless of which file they are associated with, are displayed under Tasks. Depending on how the workflow was defined, you may or may not be required to take action on a specific task. Additionally, your task may have a deadline. A workflow task will remain in your Tasks list until it either expires or you take action.



Take Action on a Task

Xythos

FilesTasksReports & Tools

Do TaskWorkflow Detail

Help

Task	Associated with	Workflow Name	Workflow Owner	Start Date	Due Date
! Mandatory Approval	This is a Folder	Reviewer Optional	J Smith	1/2/08 9:38:32 AM PST	1/7/08

(Figure 7.0.9)

1. Click on the **Home** link in the top left main menu.
2. Click on the **Tasks** tab.
3. From within the **Tasks** screen, you may open the document by clicking on the name of the document, or you may perform the task by clicking on the task name.
4. Click on the name of the task for which you wish to take action.
5. In order to complete the task, follow the instructions provided in the task page. Which action you are able to take is dependent on how the workflow was defined.

Reporting on Workflows

You may view all workflows in one central location to which you have access by visiting the Reports and Tools tab then selecting the appropriate Workflows link.

Active Workflows

Similar to the Workflow History, Active Workflows lists the name, the owner, the file name, start date and status. Active workflows are all currently active workflows, whereas Workflow History lists all inactive workflows. You may have a status of **Running**, **Late** or **Error**. You may view the file or workflow tasks at any time from this screen.

Name	Owner	Associated with	Start Date	Status
! Reviewer Optional	J Smith	This is a Folder	1/2/08 9:38:27 AM PST	Late

(Figure 7.1.0)

Manage Reviewer Optional

Stop Workflow View Template Details

Running on: /jsmith/This is a Folder
Start Date: 1/2/08 9:38:27 AM PST
Template Description:
Workflow Owner: J Smith
Send email notification of workflow progress to: J Smith
Status: Running (Late)

Tasked to	Type	Start Date	Due Date	End Date	Status	Reassign
! J Smith	Mandatory Approval	1/2/08 9:38:32 AM PST	1/7/08		Late	

Exit

(Figure 7.1.1)

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the Workflow.
5. All tasks, along with the details of the task are listed.

6. Click on the **Exit** button.

View the Template Details for a Workflow


1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the Workflow.
5. Click on the **View Template Details** button.
6. Changes may not be made to this workflow, however you may view all details including steps.
7. Click on the **Back** button.
8. Click on the **Exit** button.

View the file associated to the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the file.
5. The file will then be opened.













Stop the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **radio button** associated to the Workflow.
5. Click on the **Stop**  button.
6. The Workflow will be immediately stopped and moved to your **Workflow History**.

Workflow History

Similar to the Active Workflows, Workflow History lists the name, the owner, the file name, start date and status. Active workflows are all currently active workflows, whereas Workflow History lists all inactive workflows. You may have a status of Completed or Stopped. You may view the file or workflow tasks at any time from this screen.

Xythos				
Files Tasks Reports & Tools				
My Subscriptions My Tickets Active Workflows Workflow History All Workflows Expired Documents Ex				
Workflow Detail Help				
Name	Owner	Associated with	Start Date	Status
 ! End Workflow	J Smith	 Audit.csv	11/16/07 3:07:19 PM PST	Late
 Add Tag	J Smith	 Role.csv	1/2/08 9:02:33 AM PST	Completed
 Add Tag	J Smith	 Record.csv20071226195532	11/4/07 12:31:40 PM PST	Completed
 htfhgfhg	J Smith	 ExportFile.xml	10/26/07 11:36:35 AM PDT	Stopped
 Approval Process	J Smith	 ExportFile.xml	10/25/07 8:55:00 AM PDT	Completed

(Figure 7.1.2)



View the workflow History

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the Workflow.
5. All tasks, along with the details of the task are listed.
6. Click on the **Exit** button.

View the Template Details for a Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the Workflow.
5. Click on the **View Template Details** button.
6. Changes may not be made to this workflow, however you may view all details including steps.
7. Click on the **Back** button.
8. Click on the **Exit** button.

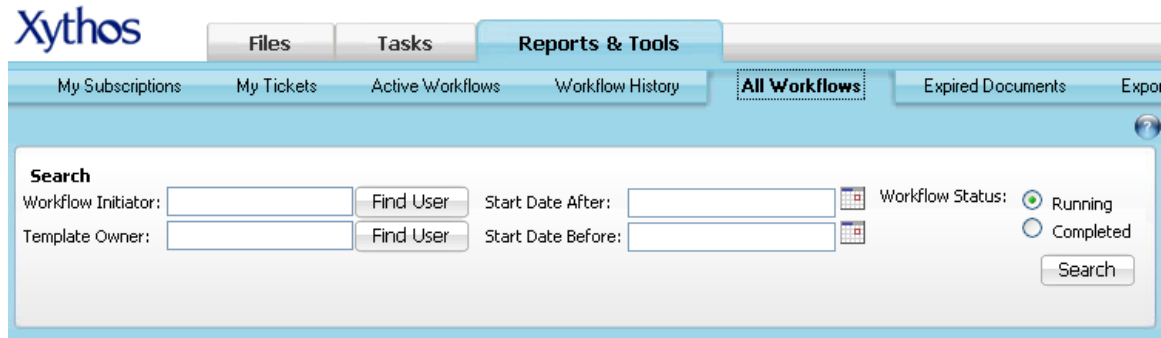
View the file associated to the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the file.
5. The file will then be opened.

All Workflows

The All Workflows screen is the compilation of both the Active Workflows and Workflow History screens for all users. The All Workflows screen is only available to those users that have the Workflow Admin ability. Within this screen, you may search for all workflows within the Organization using the following criteria:

Option	Description
Workflow Initiator	The user who starts the workflow, however they are not necessarily the owner of the workflow.
Template Owner	The owner of the workflow template, though they may not have been the original creator.
Start Date From	The date the workflow was started. Search for all Workflows started from this date and later. Use in combination with the "Start Date To" in order to define a specific date period.
Start Date To	The date the workflow was started. Search for all workflows started from this date and before. Use in combination with the "Start Date From" in order to define a specific date period.
Workflow State	Running or Completed. If a workflow is currently listed as running, it will be visible in the user's Active Workflows screen and has not yet been completed. If a workflow is currently listed as stopped, it will be visible in the user's Workflow History screen and has either been completed or stopped.



(Figure 7.1.3)

Search for Workflows based on initiator

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Find User** button to the right of the **Workflow Initiator** field.
5. Define the criteria in order to locate the user.
6. Click the **OK** button.
7. Click the **radio button** associated to the desired user.
8. Click the **Next** button.
9. Click on the **Search** button.
10. All workflows initiated by the defined user will be displayed. Note the radio button setting for **Workflow State**.

Search for Workflows based on workflow template owner

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Find User** button to the right of the **Template Owner** field.
5. Define the criteria in order to locate the user.
6. Click the **OK** button.
7. Click the **radio button** associated to the desired user.
8. Click the **Next** button.
9. Click on the **Search** button.
10. All workflows using a workflow template owned by the defined user will be displayed. Note the radio button setting for **Workflow State**.

Search for Workflows based on date

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Calendar icon** to the right of the **Start Date After** field.
5. Select a calendar date on or before today's date. For example, February 14, 2006.
6. Click on the **Calendar icon** to the right of the **Start Date Before** field.
7. Select a calendar date after the date you selected for the **Start Date After** field. For example, November 14, 2007.
8. Click on the **Search** button.
9. All workflows started between February 14, 2006 and November 14, 2007 will be displayed. Note the radio button setting for **Workflow State**.

Search for Completed Workflows

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.

3. Click on the **All Workflows** tab.
4. Click on the **Completed** radio button.
5. Click on the **Search** button.

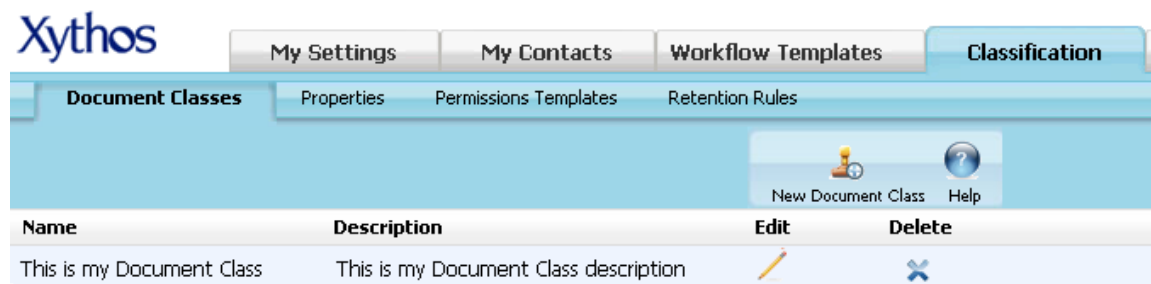
Search for Running Workflows

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Running** radio button.
5. Click on the **Search** button.

Setting up Classification

Classification is Xythos' solution for managing an organization's documents records in a more regulatory and standardized manner. Using Document Classes, Document Class Properties, Retention Rules, and Permission Templates, classification administrators and users can adhere to organizational policy and standardize the process by which you maintain communication within your company.

The classification module is an optional part of your Xythos system. Whether the module is enabled is controlled by your system administrator. Functionality within the system is controlled by using roles. Roles are defined by the abilities granted to them. Users can be granted all or partial access to the classification functionality. Therefore, depending on which role you have been assigned to, some or all of the screens described in this help may not be available to you.



(Figure 7.1.4)

Document Classes


A document class is a categorization of a particular file which includes properties, as well as an optional retention rule. Document classes can be assigned to folders such that any file uploaded to that folder must be classified according to any of the document classes assigned to that particular folder.

Document classes consist of properties and a retention rule. You must first add properties before assigning them to a particular document class. The same holds true for retention rules. You must first add a retention rule before applying it to a particular document class.




New Document Class

(Figure 7.1.5)

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **New Document Class**  button.
5. Define the document's required **name**. The **description** is optional.
6. If you wish to apply a **retention rule** to the document class, you must first define it under Retention Rules. You may then use the drop-down window on the document class screen in order to apply the retention rule to this new document class.
7. You are given a list of all existing properties and may apply one or more of them to the document class.
8. Use the > and < buttons to move the properties between columns. Moving it from **Available Properties** to **Assigned Properties** adds the property to the current template. The reverse order removes the property from the template.
9. You may also make a property mandatory by clicking on the property and then clicking the **Change Mandatory** button. If a property is mandatory, the user must define a value for the property before the resource (file, folder, etc.) can be created.
10. You may also change the order in which properties appear on the screen. Use the **Move Up** and **Move Down** buttons for this purpose.
11. Once you are finished with all changes, click the **OK** button.




Edit a Document Class

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **Edit**  icon associated to the document class you wish to edit.
5. You may change any of the class's properties, including the **name** and **description**.
6. Click **OK**.



Delete a Document Class

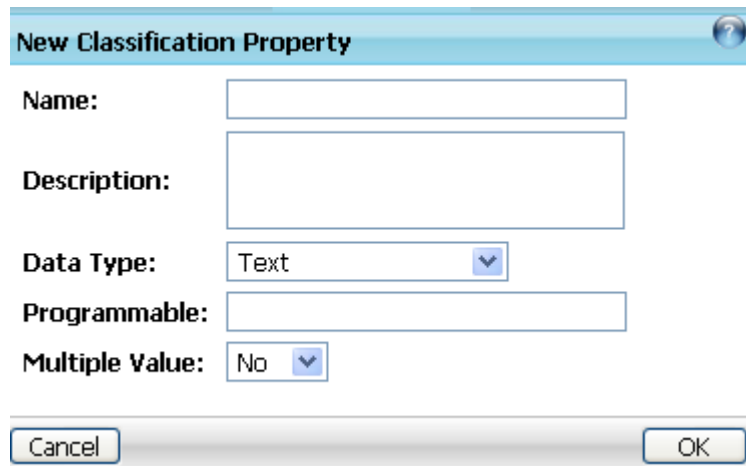
1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **Delete**  icon associated to the document class you wish to delete.

Properties


Document Class Properties are defined globally and can be applied to any and all document classes. Properties make up the attributes of document classes and also include their own attributes including data type, programmable, and a multi-value option.



New Classification Property





(Figure 7.1.6)

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click on the **New Classification Property**  button.
5. Define the classification property's required **name** and **data type**. Optionally supply a **description**.
6. If you would like the property to be defined by a Java class, enter the class name in the field.
7. If you would like the property to be a list of values, select **Yes** in the **Multiple Value** drop-down box.
8. Click the **OK** button.




Edit Classification Property

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.

3. Click on the **Properties** tab.
4. Click on the **Edit**  icon associated to the document class property.
5. Edit the following fields: **Name, Description, Programmable**.
6. If you are editing a classification property which has **Multiple Value** set to yes, then you will also be able to edit the displayed values by clicking **Add Value** or by clicking the **Delete**  icon associated to a value.
7. Click the **OK** button.



Delete Classification Property

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click the **Delete**  icon associated to the document class property.

Permissions Templates

A permission template is a set of permissions that can be applied to a document. Once you define a set of permissions, they are applied to a file once that file is uploaded as part of document classification. The Permissions Template consists of a list of users, including the standard pre-defined user groups of "Authenticated Users" and "Public". Each user and group of users defines read, write, delete and administrative permission for that entry.



New Permissions Template


New Permissions Template ?

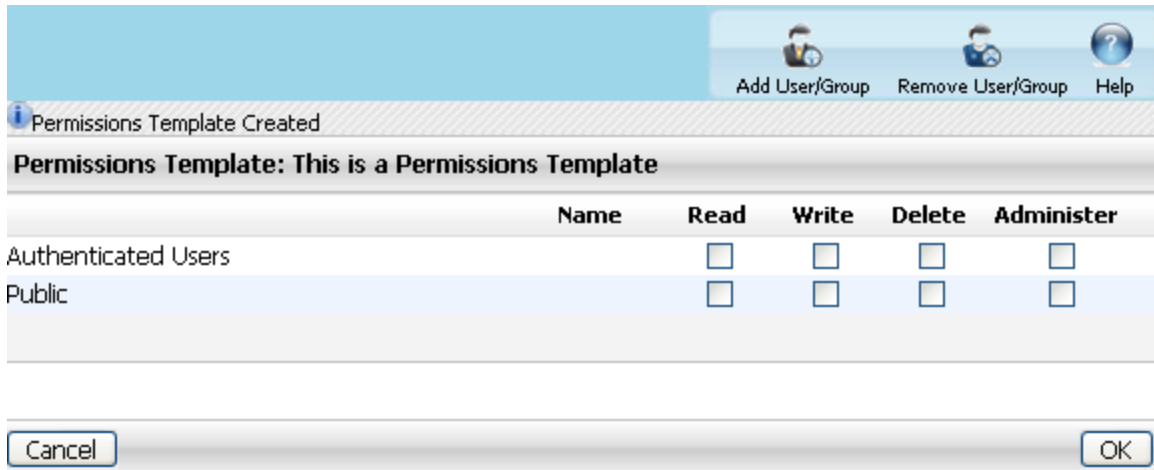
Name:

Description:

Cancel
Next



(Figure 7.1.7)

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Permissions Templates** tab.
4. Click on the **New Permissions Template**  button.
5. Define the permission template's required **name**.
6. Optionally provide a **description**.
7. Click the **Next** button.






Name	Read	Write	Delete	Administer
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Figure 7.1.8)

8. Define the appropriate permissions to the **user(s)** and/or **group(s)** listed.
9. To add additional **users** and/or **groups**, click the **Add User/Group**  button.
10. To remove **users** and/or **groups**, click the **Remove User/Group**  button.
11. Once your list of users is complete, define each of their corresponding read, write, delete, and administer permissions. Keep in mind that these permissions are applied to a file that is classified using this template. The permissions do not actually exist until the file is uploaded and the template is applied.
12. Click the **OK** button.




Edit a Permissions Template's Entries and Permissions

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Permission Templates** tab.
4. Click the **Permissions**  icon associated to the permissions template you wish to edit.
5. Define the appropriate permissions to the **user(s)** and/or **group(s)** listed.
6. To add additional **users** and/or **groups**, click the **Add User/Group**  button.
7. To remove **users** and/or **groups**, click the **Remove User/Group**  button.
8. Once your list of users is complete, define each of their corresponding read, write, delete, and administer permissions. Keep in mind that these permissions are applied to a file that is classified using this template. The permissions do not actually exist until the file is uploaded and the template is applied.
9. Click the **OK** button.



Delete a Permissions Template

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Permission Templates** tab.
4. Click the **Delete**  icon associated to the permissions template you wish to delete.

Retention Rules

Retention rules define when a document will expire, in the number of days, months, and years. Retention rules are independently created and then can be assigned to a particular document class such that when assigning a document class to a file, the retention rule of the class is applied to the file upon upload. Retention rules have a name, description, owner, and an expiration date including the option to not expire and make the file permanent. Additionally, retention rules may be assigned a permissions template. Once a retention rule is applied to a file, the owner of the file is changed to the retention rule owner, the file's permissions are changed to those of the retention rule's permissions template and an expiration date is calculated for the file based on the expiration day, month, year defined for the retention rule from the file's creation date.



New Retention Rule

New Retention Rule

Name*:

Description:


Expires After: year(s): month(s): day(s):
☐ No expiration - make document permanent

Permissions Template:

Owner:


* - Denotes Mandatory

(Figure 7.1.9)

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Retention Rules** tab.
4. Click on the **New Retention Rule**  button.
5. Define the retention rule's required **name**.
6. Optionally provide a **description, expiration, permissions template** and **owner**.
7. The **expiration date** will be calculated using these options from the time the file is uploaded, i.e. the creation date. If you would like the file to be permanent instead of expiring, place a checkmark in the **No expiration - make document permanent** box.
8. The **owner** defined here will become the owner of the file that is classified using this retention rule. In other words, once a file is uploaded and classified as Document Class A. Any of the retention rules associated with Document Class A may be applied to the file.
9. Click **OK**.




Edit a Retention Rule

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Retention Rules** tab.
4. Click on the **Edit**  icon associated to the retention rule you wish to edit.
5. You may change any of the retention rule's properties, including the **name** and **description**.
6. Click **OK**.



Delete a Retention Rule

1. Click on the Setup link in the main menu.
2. Click on the Classification tab.
3. Click on the Retention Rules tab.
4. Click on the Delete  icon associated to the retention rule you wish to delete.

Using Classification

Classification is Xyθος' solution for managing an organization's documents records in a more regulatory and standardized manner. Using Document Classes, Document Class Properties, Retention Rules, and Permission Templates, classification administrators and users can adhere to organizational policy and standardize the process by which you maintain communication within your company.

The classification module is an optional part of your Xyθος system. Whether the module is enabled is controlled by your system administrator. Functionality within the system is controlled by using roles. Roles are defined by the abilities granted to them. Users can be granted all or partial access to the classification functionality. Therefore, depending on which role you have been assigned to, some or all of the screens described in this help may not be available to you.

Classify a File

You can assign one or more allowable document classes to a folder such that when a file is uploaded to that folder, the document can be classified by choosing a class from the list of allowable document classes assigned to the folder.

Once the allowable document classes have been chosen, you can designate a default class such that the specified document class is the first choice in document classes when uploading files to that particular folder.

Assign an Allowable Document Class to a Folder


In order to assign an allowable document class to a folder, you must be a classification administrator and you must have administer permission on that folder.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to assign an allowable document class.
3. **Right-Click** the folder's name and select **Manage -> Allowable Classes**.
4. Click the **Add Document Classes** button, to view all available Document Classes.
5. You are provided with a list of document classes that have not yet been assigned to this folder. Therefore, if you have already assigned all existing document classes to this folder, none will display in this list.
6. Click on the Document Class or Document Classes you would like to add. If you would like to add multiple classes, use the CTRL or Shift keys during your selection.

7. Select the **Scope** of the change. Using the **radio buttons**, select one of the following options: *Apply the changed document classes to this folder as well as its sub-folders.* Or *Apply the changed document classes to this folder only.*
8. Click the **OK** button.
9. You will now be able to view all Allowable Document Classes assigned to this folder. Click the **Exit** button.

Classify a File Upon Upload

Once you have assigned the desired allowable document classes to a folder, you may upload a file to that folder and classify the document upon upload.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder to which you would like to upload a file.
3. Click the **Upload**  button.
4. If you have associated more than one **Allowable Document Class** to the folder, you will have a drop-down menu from which to choose the Document Class. If you do not see this drop-down menu, it is because there is only one Allowable Document Class for this folder.
5. Select the Document Class, and then press **OK**.
6. You will be brought to the upload screen. Using the **Browse** button, you may browse to the file you would like to upload. You may select as many files as you would like by selecting the **Add File** button.
7. At the bottom of the **Upload** screen, the **Classification Properties** of the selected Document Class are displayed.
8. Fill in all Classification Properties listed as **Mandatory**. All Mandatory items will have an asterisk (*). You may also fill in any additional Classification Properties at this time.
9. Click the **Start Upload** button.
10. When the upload is complete, you will be returned to the **Document Manager**.

Designate a Default Document Class on a Folder

If you add document classes to a folder, it is important to denote the default document class. If you do not, you will run into problems when using an application other than the web view, e.g. web folders, to add files to the classified folder. You will also not be able to add a dropbox or wiki to a folder with classification unless a default document class has been selected.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to assign a default document class.
3. **Right-Click** the folder's name and select **Manage -> Allowable Classes**.
4. Click the **Checkbox** associated to the Allowable Document Class you wish to set as default.
5. Click the **Apply** or **Exit** button.
6. Select the **Scope** of the change. Using the **radio buttons**, select one of the following options: *Apply the changed document classes to this folder as well as its sub-folders.* Or *Apply the changed document classes to this folder only.*
7. Click the **OK** button.

Manually Classify a File or Folder

1. Within the **Document Manager**, navigate to the file or folder you would like to apply classification to.
2. **Right-Click** the file or folder, and then select the **classify** option.
3. You will be brought to the **Classification Wizard**, which will guide you through classifying your file or folder.
4. Using the drop-down menu, select the **Document Class**, and then click the **Next** button.
5. Once all **properties** have been entered, click the **Finish** button.

Retention Rule

Retention rules define when a document will expire, in the number of days, months, and years. Retention rules are independently created and then can be assigned to a particular document class such that when assigning a document class to a file, the retention rule of the class is applied to the file upon upload.

Retention rules have a name, description, owner, and an expiration date including the option to not expire and make the file permanent. Additionally, retention rules may be assigned a permissions template.

Once a retention rule is applied to a file, the owner of the file is changed to the retention rule owner, the file's permissions are changed to those of the retention rule's permissions template and an expiration date is calculated for the file based on the expiration day, month, year defined for the retention rule from the file's creation date.

A retention rule can be applied can be applied to a file in one of two ways:

- **Manually Applying a Retention Rule** - After a file has been uploaded, navigate to the file's **Manage -> Retention** page and apply the retention rule.

Classification Details for /jsmith/This is a File.jpg

Classify File Edit Expiration Date Edit Retention Rule

Document Class: Unassigned
Applied Retention Rule: Unassigned
Expiration Date: Unassigned
Permanent: No

Apply

Exit

(Figure 7.2.0)

- **Applying a Retention Rule through a Document Class** - You can apply a retention rule by classifying a file using a particular document class that has already been assigned a retention rule. To add a retention rule to a document class, edit the document class using the instructions "Edit a Document Class". Once a file is classified, the retention rule will be automatically applied.

Manually Apply a Retention Rule to a File

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Select the **Retention Rule** by using the drop-down menu.
4. Click the **Apply** button.

Change a File's Retention Rule

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Select the **Retention Rule** by using the drop-down menu.
4. Click the **Apply** button.

Overriding a Retention Rule

You can override a file's retention rule to change the expiration date. At any point before the expiration date, you can maintain the same retention rule for a file but change the date it expires.

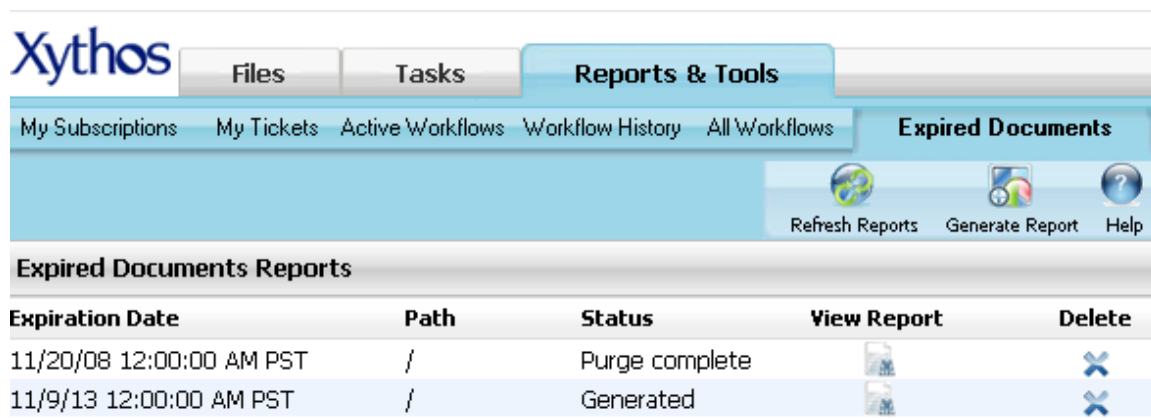
Expiration Date

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Click the **Calendar** button, and select the appropriate date.
4. Using the drop-down menu, select the **Time**.
5. *Optionally set the retention as **Permanent** by using the drop-down menu.*
6. Click the **Apply** button.

Reporting on Classification: Expired Documents

The classification module features a utility for reporting and purging expired documents. The utility provides a comprehensive report of all expired documents that are eligible for deletion. You may then initiate a purge of all the documents listed in the report via the same utility.

An expired document is a document that has surpassed its retention rule's calculated expiration date. Once a file is purged from the system, it is deleted and no longer accessible.




Expiration Date	Path	Status	View Report	Delete
11/20/08 12:00:00 AM PST	/	Purge complete		
11/9/13 12:00:00 AM PST	/	Generated		

(Figure 7.2.1)




Generate a Report

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **Generate Report**  button.
5. Define the **report's start path**. The start path is the top most folder from which you wish to search. The search will include all sub-folders of the report start path.
6. Define the **Expired documents as of** field. Use the calendar icon to pick a date of expiration. The report will list all documents that have expired from the "Expired documents as of" as well all of the documents that expired prior to that date. The only exclusion is documents that have been previously purged from the system.
7. Click on the **OK** button.
8. Your report will now be listed on the **Expired Documents Reporting** screen.
9. Click the **View Report** button associated to the report in order to view the listed expired documents.
10. The report will now have the status of **Generated Report**.





Viewing Expired Documents

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **View Report**  button associated to the report in order to view the listed expired documents.




Purging Expired Documents

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **View Report**  button associated to the report in order to view the listed expired documents.
5. Click on the **Purge Documents**  button in order to purge all documents listed in this report.
6. Once you have purged all documents, the status of the generated report will now be listed as **Purge Complete**.



Delete an Existing Report

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **Delete**  button associated to the report you wish to delete.

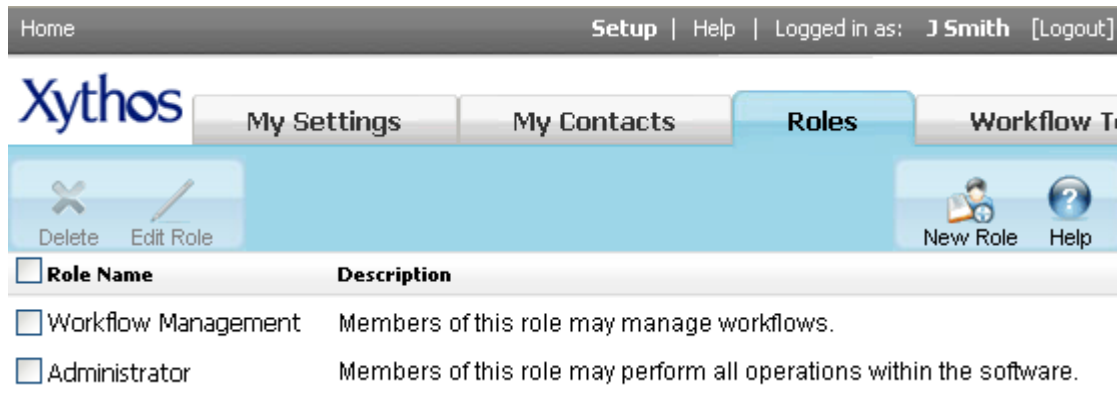
Roles

A role represents a **set of abilities** and the users that have been granted those abilities. Only users belonging to the role will be able to perform the set of abilities defined for that specific role as long as they have the appropriate permissions. Abilities define the specific functionality that can be performed, e.g. *Create Document Classes*. Only those users who have been assigned a role with the ability *Create Document Classes* will be able to create a Document Class within the system.

Some roles have been created through the admin pages. However, roles may also be managed from within the web view. A user must have the ability to modify roles to access the roles screen.

When creating a new role, you may choose from the **list of abilities to grant to that role**. The abilities determine what areas of functionality are available to the set of assigned users. For example, depending on the Roles assigned to the user, they may or may not see the Roles, Templates or Classification tabs within the Setup screen. Roles determine what you do or do not have access to and as such will also determine what is visible on your screen.


Roles, however, do not replace permissions. You are required to have the correct permissions in order to access the items on which the role-based functionality can be performed. In other words, though you may have permission to perform an action, you may not have the rights on the file or folder to complete the action. Creating, editing, and deleting roles require the current user already have the **Manage Roles** ability as granted by the admin.



(Figure 7.2.2)



Create a new role

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Click on the **New Role**  button.
4. Define a **name** and optionally a **description**.
5. Click **Next**.
6. Use the **>** and **<** buttons to move the abilities between columns. Moving it from **Available Abilities** to **Assigned Abilities** adds the ability to the current role. The reverse order removes the ability from the role.
7. Click **Next**.
8. To assign users or groups to this role, use the find utility.
9. Click the **Add Selected Users** button. Repeat this step to assign more users or groups to this role.
10. Click the **Save** button.



Edit an existing role:

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the role you wish to edit, and then click the **Edit** button.
4. You may now edit any of the options within the Edit Role screen by using the available links:
 - a. Name and Description
 - b. Abilities
 - c. Members
5. Click the **Exit** button when all changes are complete.

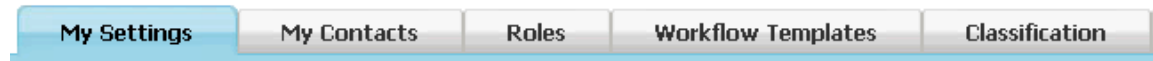


Delete an existing role:

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the Role in which you wish to delete, and then click the **Delete** button.

My Settings

Your personal settings can be accessed by clicking on the **Setup** link (see *figure 1.0.1*) in the upper right corner of the web view. Within the setup space, you have access to modify your personal settings, your contacts and groups; you may have additional options if your administrator has granted you permission to manage and edit roles, manage workflow templates and classification. Depending on your user model (e.g. using LDAP), you may not be able to modify some personal settings.



(Figure 8.0.0)

(Figure 8.0.1)

Username

The Username is the name provided by your Administrator and typically will be a combination of the first letter of your first name and your entire last name. For example, if your name is Jane Smith, then your Username will be jsmith. You may only view this setting from within your “My Settings” tab. You may not modify this setting.

Display Name

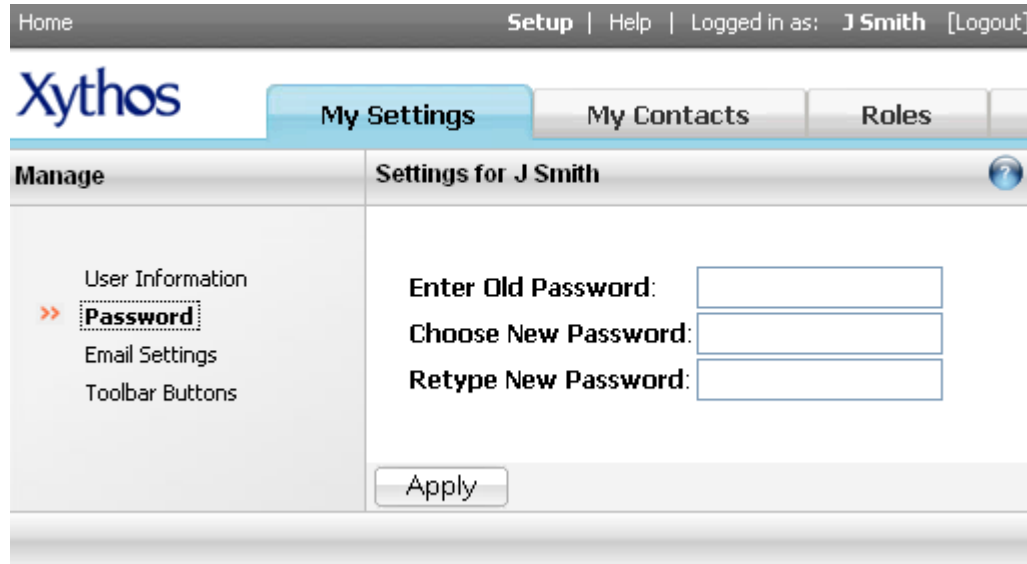
The Display Name is typically your first and last name. For example, if your name is Jane Smith, then your Display Name will be Jane Smith. You may modify this setting if necessary. The Display Name is visible during sharing, emailing and other functions.

Timezone

The Timezone is the time in which you reside. For example, if you live in California you will select the “America/Los Angeles” option. If the Timezone is not set properly, all time-stamped items will be incorrect. You may modify this setting if necessary.

Date/Time Style

The Date/Time Style is the way in which you wish both the date and the time to be shown. There are 16 available styles to choose from. The options vary from "12/19/07" to "Wednesday, December 19, 2007 12:23:15 PM PST". If the Date/Time is not set to your liking, you modify this setting which will be reflected in all time-stamped items.

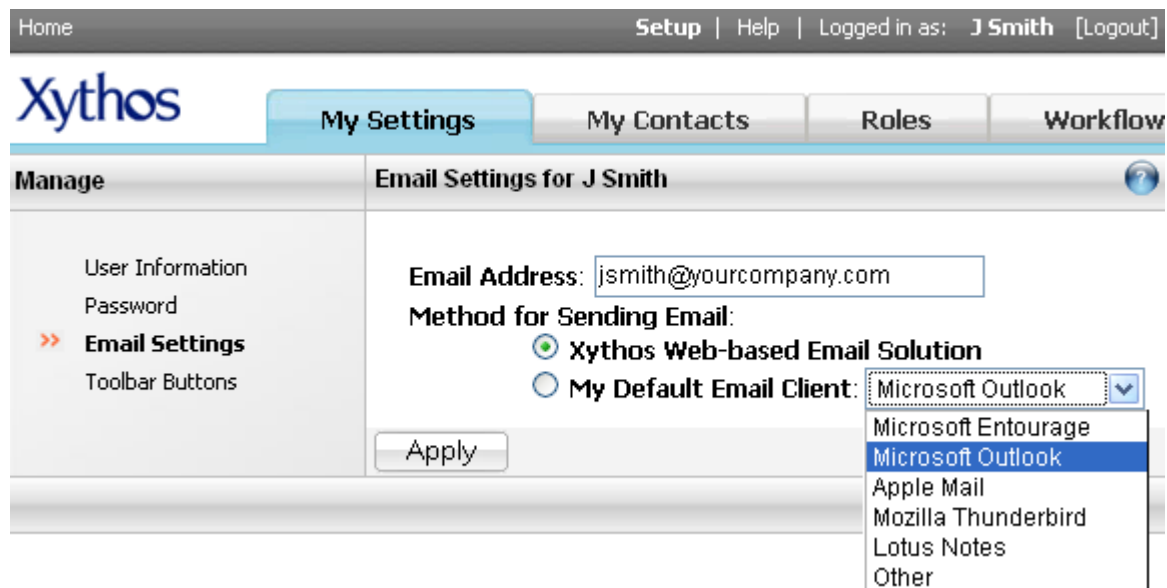


The screenshot shows the Xythos web interface. At the top, there is a navigation bar with 'Home', 'Setup', 'Help', and 'Logged in as: J Smith [Logout]'. Below this is a tabbed interface with 'My Settings', 'My Contacts', and 'Roles'. The 'My Settings' tab is active, and the 'Manage' sidebar on the left has 'Password' selected. The main content area is titled 'Settings for J Smith' and contains three input fields: 'Enter Old Password:', 'Choose New Password:', and 'Retype New Password:'. An 'Apply' button is at the bottom.

(Figure 8.0.2)

Password

The Password is the password which is used to access your account, whether it is through the web view or through the Xythos drive. It is possible that you may not modify your password depending on the type of environment your administrator has setup.



The screenshot shows the Xythos web interface with the 'Email Settings' section selected in the 'Manage' sidebar. The main content area is titled 'Email Settings for J Smith'. It includes an 'Email Address' field with 'jsmith@yourcompany.com'. Under 'Method for Sending Email', there are two radio buttons: 'Xythos Web-based Email Solution' (selected) and 'My Default Email Client'. A dropdown menu is open for the 'My Default Email Client' option, showing a list of email clients: Microsoft Outlook, Microsoft Entourage, Apple Mail, Mozilla Thunderbird, Lotus Notes, and Other. An 'Apply' button is at the bottom.

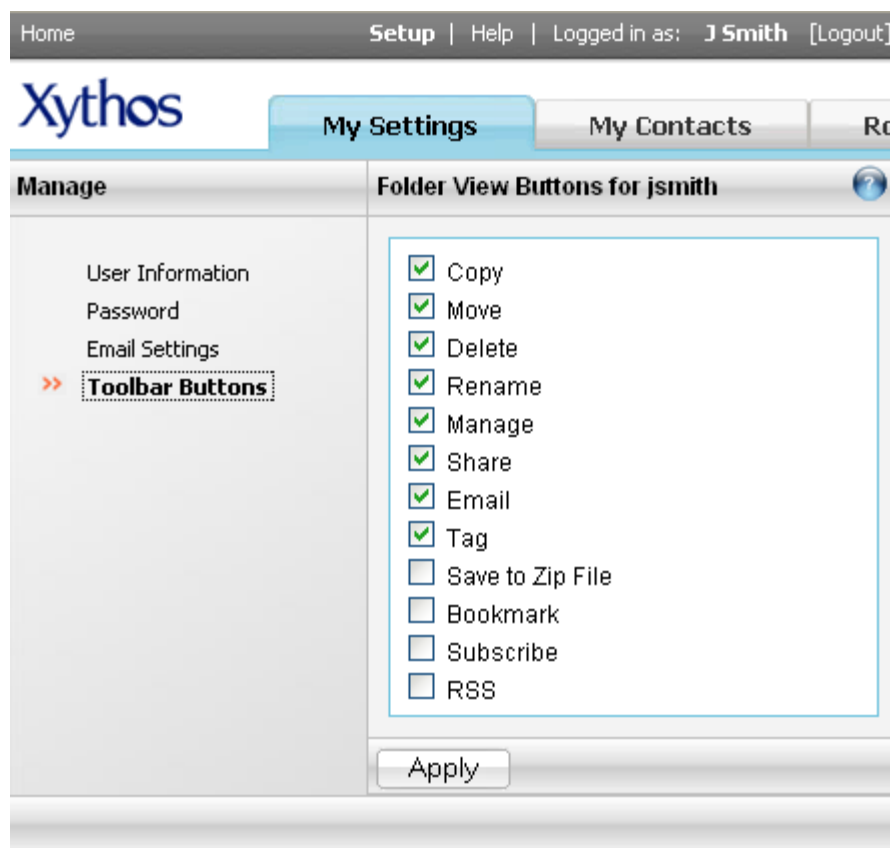
(Figure 8.0.3)

Email Settings

The Email address is used during Email notifications when a resource has been shared, a task is in need of managing, and other such system notification emails. Verify the validity of this email address; otherwise you will miss out on important information. You may modify this setting if necessary.

The method for sending email may or may not be available, depending on your environment's configuration. If enabled, you have the option to select either Xythos Web-based Email Solution or My Default Email Client. Selecting the "Xythos Web-based Email Solution" will use the email screens within the web view. Selecting the "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending email. You must select your true default email client. If, for example your default email client on your computer is Microsoft Outlook and you set your Default Email Client in Xythos to Lotus Notes, Microsoft Outlook will be launched. Selecting the incorrect email client can cause unfavorable results.

The Email address is visible during sharing, emailing and other functions.



(Figure 8.0.4)

Toolbar Buttons

This section determines which buttons will appear, by default, in your toolbar. You may modify the toolbar buttons at any time.

Export

If your file system seems to be growing to an unmanageable size or you wish to move content to another system, you may Export part or all of your file system. Exporting your content moves files into the target destination folder and creates one XML file for the options chosen. In order to perform an export, you must have the Export Objects or Export Objects (Ignore Permissions) ability.

The difference between the two abilities is: Export Objects only allows you to export those objects that you have administer permission on where Export Objects (Ignore Permissions) allows you to export all objects regardless of the permissions you have on those objects.

Export content

1. Click on the **Home** link in the main menu, in the upper left corner.
2. Click on the **Reports & Tools** tab.
3. Click on the **Export** tab.
4. Define the export **parameters**:

Option	Description
Source	This is the content you wish to export out of the system. The default is the top level of your file collaboration space. However, you can drill down into any sub-folder within this space.
Destination Folder	This is where your content will be copied. You can choose to export content to a folder within the collaboration space or within the Records Management space.
Destination XML Filename	This is the name of the XML file that will contain metadata, document classes and roles information. information. You must name the file with an .xml extension.
Log Folder	The export will generate a log file and you determine in what folder this file will be located. The log folder and destination folder cannot be the same folder.
Log File Name	Name the log file that will be located in the folder above.

5. Select the appropriate export **options**:

Option	Description
Overwrite exported file content if it already exists	If the file content already exists and you do not select this option, the content will not be exported.
Include Roles	Exports the name, description, whether the role can be edited through the web view or not, the abilities associated with the role and all users who have been assigned to the role. Every role in the system is exported in this manner.
Include Abilities	Exports the name, description and dependencies of every ability in the system.
Include Users & Groups	For Users, export includes the user's name, virtual server, home folder, display name, email address, language preference, timezone, date format, and password. For Groups, export includes the group's name, virtual server, description, and the group's member users.
Include Document Classes	Exports the document class name, description and whether the document class is protected or not. This also includes each document class property name, whether that property is required or not and whether the property is deletable or not.
Include Logged Actions	Exports all events, which user performed the event, the date the event occurred and on which virtual server the event occurred.
Include Folders	Exports all folders and their name, owner, location, all permissions including the inheritable permissions, and whether logging and/or versioning is

	enabled for the folder.
Include Files	Exports all files and their name, owner, path, location, content type, permissions and whether logging and/or versioning is enabled for the file.
Include Metadata	Exports all properties along with their data including description, data type, namespace, case-sensitivity, whether the property is readable and/or writeable outside the API, whether the property is versioned and whether the property is protected or not.

6. Click the **OK** button.

Once the export completes, the source content can be found in the **Destination Folder**.

WebDAV

WebDAV is the technology that Xythos uses to support Internet-based collaboration on files. A WebDAV client is any application that also uses this technology to communicate with a WebDAV Server, e.g. Xythos. Such applications include Web Folders, Mac OS X WebDAV folder, Windows Explorer, Xythos Drive, and Microsoft Office applications.

You can use any WebDAV client to access your Xythos account. Often, these clients have a more familiar interface and because they are desktop applications, certain features such as drag-and-drop make interacting with your account easier and more user-friendly.

Windows

Enabling and Using Web Folders

Web Folders are a valuable tool for editing your files in their native applications. If using Internet Explorer and a WebDAV enabled application such as Microsoft Office, you may create a web folder and open and edit files directly from that folder. The web folder looks like a folder on your local desktop, however it actually corresponds to a folder within your account. In other words, you can leave Xythos and work directly with the tools and applications you work with everyday.

In order to run Web folders correctly, you need to have your "security cookie" set.

Set your security cookie:

Log into your account using Internet Explorer 5.0 or higher. This enables your security cookie for all Microsoft's products including IE, Windows Explorer, and MS Office. If you do not login, other applications will only be able to access files whose "Public" user access has been granted.

Create a Microsoft Web Folder when using Internet Explorer

1. From within Xythos, find the folder for which you wish to create a Web Folder and check off the checkbox directly to the left of that folder.
2. Click on the **"Web Folder"** button.
3. Your computer may be set to then automatically open that web folder. Or you can use Windows Explorer to access the new folder under "My Network Places" (Windows 2000 and XP) or "Web Folders" (Windows 98 and NT).

Create a Web Folder in Windows XP:

1. In Windows XP, click on **"Start"** and then click on **"My Network Places"**.
2. Under Network Tasks, click Add Network Place.
3. When prompted, "Where do you want to create this Network Place?", choose **"Choose Another Network Location"** and click on **"Next"**.
4. In the Add Network Place Wizard, follow the instructions to add a shortcut to a folder. The address of that folder will be "https://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder.
5. When prompted for a user name and password, type in your user name and password. Click **"OK"**.

6. Next, name your Network Place and select **"Next"**. When you have successfully added the shortcut, select **"Finish"**. An icon for your new shortcut will appear in the My Network Places folder.

Create a Web Folder in Windows 2000:

1. In Windows 2000, **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
2. Windows Explorer will open. Locate your Network Places in the left folder listing.
3. Click on **"My Network Places "** in the left folder listing.
4. Double click on **"Add Network Place"** in the right folder listing.
5. Enter the location of the folder to which you wish the folder to access.
6. The address of that folder will be "httpw://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder. Click **"Next"** to continue.
7. Provide your new Web folder with a name and then click **"Finish"**.

Create a Web Folder in Windows 98 or Windows NT:

1. In Windows 98 or NT, **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
2. Windows Explorer will open. Locate your Web Folders in the left folder listing.
3. Click on **"Web Folders"**.
4. Double click on the **"Add Web Folder"** icon in the right folder listing.
5. Enter the location of the folder to which you wish the Web folder to access.
6. The address of that folder will be "httpw://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder. Click **"Next"** to continue.
7. Provide your Web folder with a name and then click **"Finish"**.

You can access the folder you've just created as if it were a local folder on your machine. Save files, open files, and delete files to and from this folder through Windows Explorer or MS Office. You can also drag and drop files or cut and paste them directly into your folder.

You can also **"mount"** other users' folders if you have the correct permissions to their folders. If you do not have write permission to a folder and you attempt to drag or copy a file to it, Windows may give you a confusing error message. Thus, be sure you have the correct access rights to a folder before making it a Web Folder.

To create a Web Folder to another user's folder, simply follow the above directions replacing <folder_name> with the path to and name of that folder.

Open a file through Windows Explorer

Opening a file in your Xythos account through Windows Explorer is as easy as opening a file stored on your local hard drive.

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. Next, launch Windows Explorer. **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
3. Windows Explorer will open. Your Xythos Web folder should appear either under My Network Places (Windows 2000) or under Web Folders (Windows 98 and NT).
4. Click on the Xythos Web Folder in which you stored the document you wish to open. If you are logged in, the list of files within that folder will appear. If you are not logged in, enter your user id and password when prompted.
5. Finally, simply find your file and double-click to open it.

Open a file through My Network Places in Windows XP

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.

2. In Windows XP, click on **"Start"** and then click on **"My Network Places"**.
3. An icon for your Xythos Folder should appear in the My Network Places folder. Click on the Xythos Web Folder in which you stored the document you wish to open. If you are logged into Xythos, the list of files within that folder will appear. If you are not logged into Xythos, enter your Xythos user name and password when prompted.
4. Finally, simply find your file and double-click to open it.

Saving a file through Word 2000 (one example of a WebDAV-enabled application)

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. In order to Save a file to your Xythos account, from Word you need to click on **"File"** and then **"Save As"**.
3. In the *Save in:* dialogue box, choose **"My Network Places"** (Windows 2000 and XP) or **"Web Folders"** (Windows 98 and NT). This should bring up your Xythos Web Folder(s).
4. Finally, simply find the location where you want to save, name the file, and click **"Save"**.

Uploading Multiple Files using Windows

It is possible to upload several files to Xythos at one time using Windows. Because Web Folders share similar functionality to regular Windows folders, it is possible to upload several documents to Xythos using the Windows *Copy* function.

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. Next launch Windows Explorer or My Documents (Windows XP).
3. Navigate to the files you wish to upload. Highlight those files by clicking on them once and using the Ctrl button to highlight multiple files.
4. **Right-Click** on the highlighted files and choose **"Copy"**.
5. Next, navigate to your Xythos Web Folder under **"My Network Places"** (Windows 2000 and XP) or **"Web Folders"** (Windows 98 and NT). This should bring up your Xythos Web Folder(s).
6. Click on your Xythos Web Folder in the left folder listing so that the contents of the folder appear in the right folder listing.
7. **Right-Click** anywhere in the right folder listing or simply **Right-Click** the Xythos Web Folder in the left folder listing. Choose **"Paste"**.
8. If you are already logged into Xythos, the files you copied will transfer to Xythos. If you are not logged into Xythos, enter your user name and password when prompted. Your files will then appear in your Xythos Web Folder.

Mac

To create a Xythos Folder in Mac OS:

1. In Mac OS, choose Go from the main Finder menu and Connect to Server... from the Go sub-menu.
2. Under Connect to Server, add your folder's address.

The address of that folder will be "https://www.xythosondemand.com/ ", replacing with the folder path of the folder for which you are creating this Xythos folder.

3. Click Connect.
4. Under WebDAV File System Authentication, type in your user name and password. Click OK.
5. For future use, go to your Recent Folders where your folder will appear for continued access.

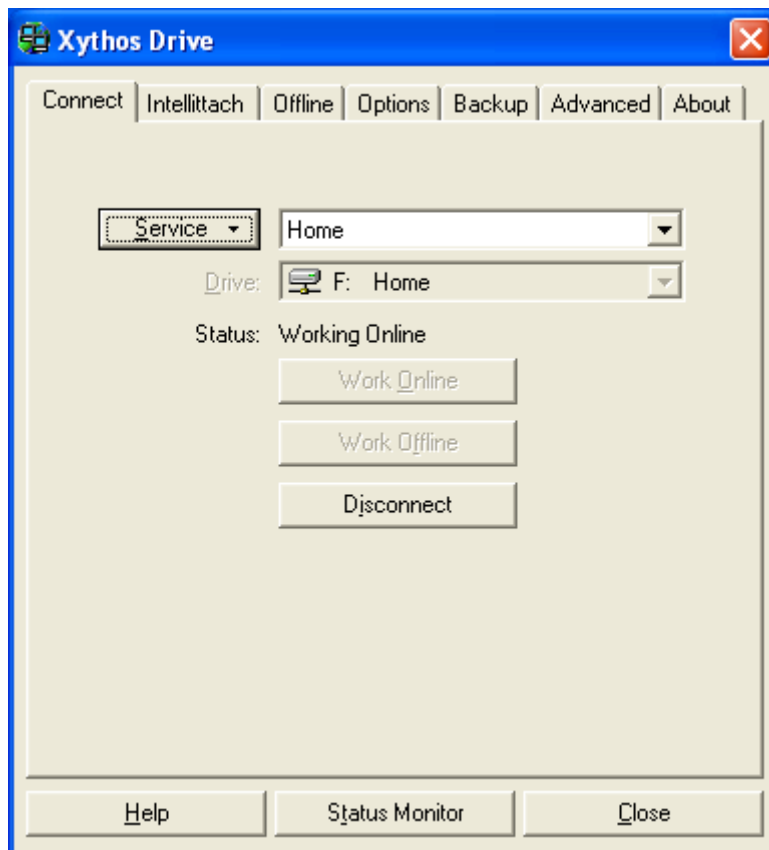
Xythos Drive

As a Xythos user, you can also access your files using the Xythos Drive, a desktop application that maps your online account to a local drive on your computer. Xythos Drive is integrated with Windows Explorer, providing a familiar environment to drag-and-drop, open, edit, and save files using other desktop applications.

Xythos Drive is an application used in conjunction with your Xythos account. You must download and install the Xythos Drive on your computer. Once installation is complete, the Xythos Drive will have a set of services that allow you to access your Xythos folders through Windows Explorer, MS Office, and any other WebDAV client.

Working Online

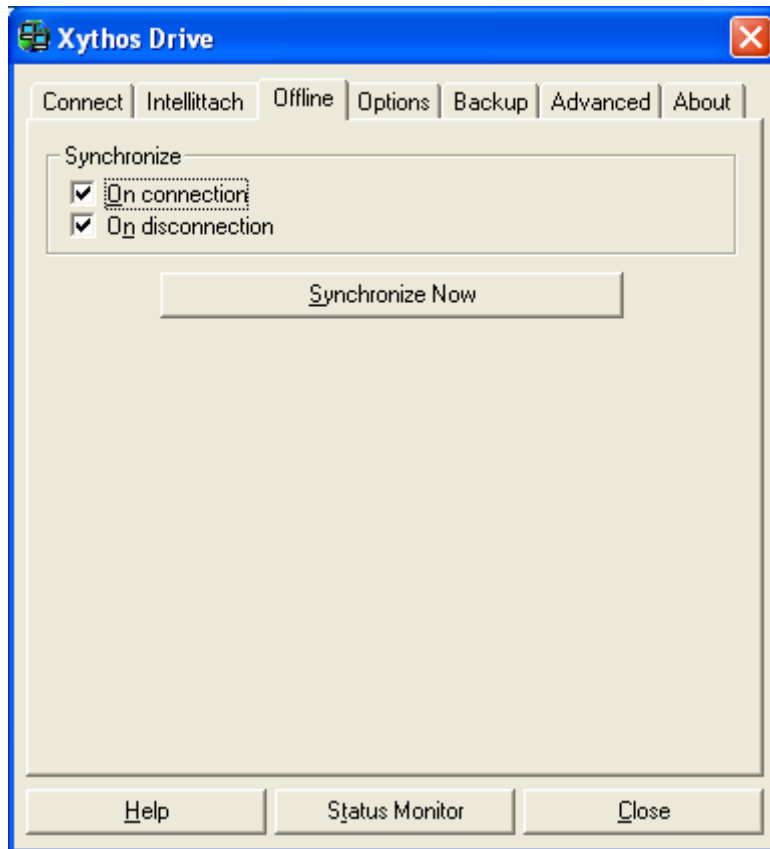
Within the Xythos Drive client you have the option to either work online or work offline. When working online you must have a connection to your Xythos Server. You may use this online mode as an alternative to the web view. You may update your Xythos files in real-time using this method.



(Figure 9.0.0)

Working Offline

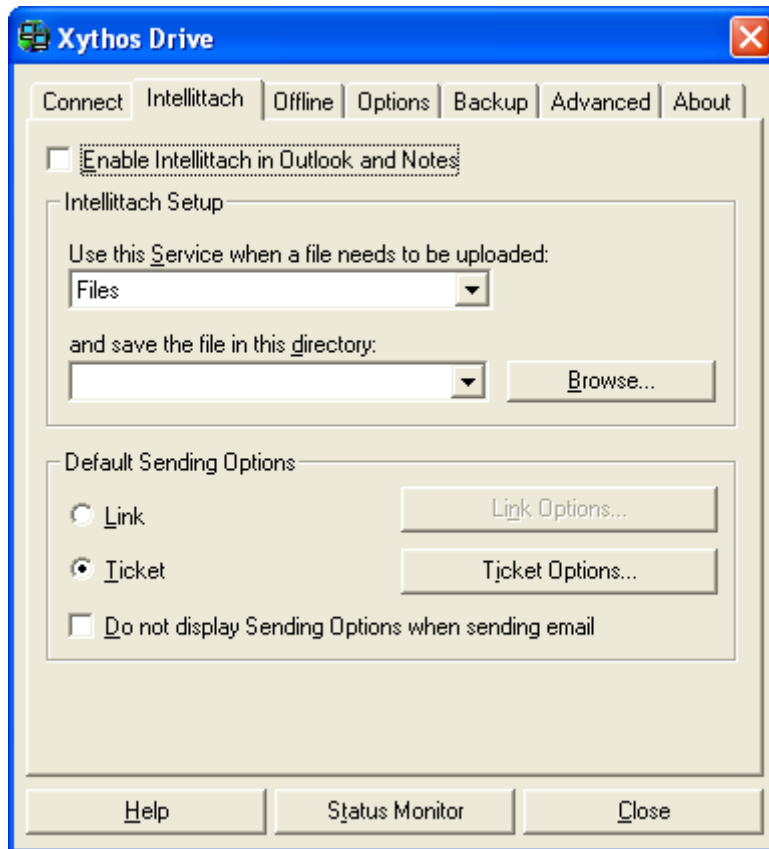
When using the Offline option, you do not need to have access to an internet connection, nor do you require access to the Xythos Server. Once you are satisfied with your files and folder modifications and/or additions you may use the synchronization option. Synchronizing your files and folders with the Xythos server ensures that you are using the same files and folders locally as that of the server. It is strongly recommended that you synchronize prior to working offline.



(Figure 9.0.1)

Intellittach

Xythos Drive allows you the capability of easily attaching direct links or tickets to your files rather than attaching the actual files to the email. Not only will this help you save disk space and bandwidth; it will also allow you to continue to track your files through Xythos. Once the Drive software is installed, you will notice that you now have a new “Intellittach” option when right-clicking on a Xythos file. In order to use the Intellittach feature, simply right-click on the file or folder of your choice and you will be guided through sending the link or ticket via email.



(Figure 9.0.2)

For more information regarding the operation of the Xythos Drive client, visit the Xythos Drive Help located at: http://public.xythos.com/home/documentation/xd_help/ver4.5/en-us/index.html