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1. How to access DocuShare

Accessing DocuShare requires an already created account. The creation of DocuShare accounts can be done through the IT service desk by dialing the 6555 or by filling out the online form on IT website or by clicking on the link below http://it.uottawa.ca/service-desk-request

Once your account has been created, you will receive an email from the DocuShare team giving you your login credentials and the procedure to access the DocuShare site. In case you did not receive an email, follow the instructions below:

DocuShare site URL: https://web32.uottawa.ca/documents/ for Facilities DocuShare: https://web32.uottawa.ca/prs

Username: same username as your exchange/outlook account

Password: same password as your exchange/outlook account

Domain: uottawa.o.univ (default domain)

Note: The ‘DocuShare’ domain is used for external parties (non-uOttawa personnel). If you do not belong to the University then your domain is likely to be ‘DocuShare’.
2. Different elements of the DocuShare homepage

The home page has four key elements:

- **Menu bar**: Allows users to logout, access tasks, and modify some of his account properties
- **Collections**: All collections to which you have been given access will appear in this section
- **My DocuShare**: This is your personalised space which includes favourites, a combined calendar, a personal trashcan and a personal collection area (anything added in there is accessible by yourself alone) and finally a section showing all groups you belong to
- **What’s New**: Provides an overview on the most recent activities performed on this site. For example the creation of a new user, addition of a new collection or document, and more.

My DocuShare page has five main elements:

- **Personal collection**: A collection only accessible by where you can add content pertaining to you.
- **Combined calendar**: a single place to view calendars you have access to.
- **Personal Trashcan**: You can restore delete files from here. Deleted files are kept for sixty days after which they are completely expunged.
- **Favourites**: a space to add content you want to access quickly
- **Tasks**: All requests for approval, review or information are stored as tasks.
<table>
<thead>
<tr>
<th>Personal collection</th>
<th>Combined calendar</th>
<th>Personal trashcan</th>
</tr>
</thead>
</table>

**Personal collection**

- **Title**: Example 1
- **Owner**: gilapre
- **Date Added**: 02/11/10
- **Size**: 12

**Combined calendar**

- **Title**: DocuShare Support Documentation
- **Owner**: admin
- **Date Added**: 19/09/12
- **Size**: 36

**Personal trashcan**

- **Status**: Yes
- **Template**: Yes
- **File**: test2
3. How to create a collection

Example 1: Creating a collection in the folder ‘Sandbox’

Note: You need to have write access in order to execute this operation

- Go into the ‘Sandbox’ collection and click on the ‘Add...’ menu
- Select ‘collection’
- On the page ‘Add Collection’, fill in the title (title for your collection), summary and description
- Click on ‘Apply’ to validate the creation of a new collection
- The newly created collection will appear with the icon ‘new’ next to it
4. How to add a document

Note: You need to have write access in order to execute this operation

- In the menu ‘Add…’ click on ‘Document’

- On the page ‘Add document’ click on the ‘Choose File’ button to find the document to add
Once the document is selected, its name is automatically inserted in the title field. You may change the title if you wish to do so.
Add Document

Add Document By:
- [ ] Uploading a document now
- [ ] Uploading a document later

Filename:

Title:

Description:

Keywords:

Expiration Date:

Max Versions:

Author:

Initial Permissions:
- [ ] Same as container
- [ ] Same as container except write restricted to owner
- [ ] Restricted to owner

Document Routing:
- [ ] Do not route the document
- [ ] Route the document and publish it later
- [ ] Publish and then route the document

APPLY

Exemple 1
Adding a new collection

Edit Selected...  Add...

[ ] Type  Title

[ ]  DS table.docx  NEW

Figure 2 – Adding a document
5. How to collaborate in DocuShare

   a. Check in / check out (from the web)

The ‘check-in’ and ‘check-out’ allows multiple users to modify a document simultaneously while keeping track of the different versions of the document. All versions of a modified document will be kept in DocuShare.

Example 2: Do a check-out/check-in

Note: You need to have write access in order to execute this operation

- Among the actions buttons that appear on the right side of a document, click on the green arrow which is the ‘check-out’ button. This action downloads the document and saves it in your “Downloads” repository. This will also keep the document in read-only mode and it will not give access for any user wanting to modify it. A small lock icon appears on the document showing that it is locked (see image below).

- Once you have completed your changes click on “Upload a New Version” to add the new version of the document
- Click on ‘Choose File’ to search the edited file, add version comments
- Click on «Apply » to unlock the document and save your changes
b. Version History
- Click on the properties’ icon located among the actions of a document
- On the properties page click on « Version History »

c. Change Preferred Version
- By default, the preferred version is always the latest version. To change the preferred version to a version other than the latest, click on « Change Preferred Version » and select the version of your choice
d. How to route a document

The ‘out-of-the-box’ DocuShare functionality allows you to automate simple work processes in order to facilitate collaboration among colleagues. There are four different types of actions for routing documents in DocuShare:

- **Approve or Reject**: To be used when an approval is required on a document.
- **Review and Make Changes**: To be used when you want the recipient to make some changes to the document.
- **Acknowledge Receipt**: To be used when you want the recipient to acknowledge the reception of a document.
- **Information**: To be used when the recipient is only receiving a document for information. No action is required of him.

There are five different types of routing order for documents in DocuShare:

- **In order**: this means the document will be sent to recipients one after the other in the order of their addition. Only once it has been approved by recipient A will it go to recipient B and so on.
- **At the same time – single reply**: this means the document will go to all recipients at the same time but once one of the recipients replies the workflow will become completed.
- **At the same time – All reply**: this means the document will go to all recipients at the same time but the workflow will be completed once all recipients have replied.
- **At the same time – Majority reply**: this means the document will go to all recipients at the same time but the workflow will be completed when the majority of recipients have replied.

**Example 3**: Create a routing slip

**Note**: For this example we will choose the action to ‘Approve or Reject’ and the default order of circulation (At the same time – All reply). The notification settings will be « When Task is Complete ».
- Click on the arrow located next to the actions buttons and select ‘Route’
- Choose ‘Approve or Disapprove’ under Actions
- Under Routing Order select the default option (At the same time – All reply)

- Enter a subject and comments if you so desire (In case no subject is entered the email subject will be the title of the document)
- Click on ‘Next’ to select the approvers. Type in the name of an approver in the ‘Search’ field and select the name once it appears
- Click on ‘Next’ to define escalation and notification settings. Click on notify me ‘When Task is Complete’
- Click on ‘Done’

- Click on ‘Submit’ to start the workflow

**Note**: If you would like to save the routing slip click on « Save Routing Slip » before clicking « Submit »
e. How to create a notification

A notification is an email sent by DocuShare to anyone desiring to be informed on all sorts of changes occurring on an object (document, collection, discussion etc...).

Example 4: How to create a notification

- Click on the arrow located next to the actions buttons and select ‘Notification’
- Click on « Create a New Notification »
- In the field «Period » select the frequency to which you would like to receive emails from DocuShare (immediately, Daily, Weekly)

- Click on « Apply » to save your notification

**Note:** To add more parameters to your notification click on « Show Advanced Options »
f. How to add comments to a document

Comments are features that become blogs on a document. It can be used in cases where modifications are not necessary in the document itself but opinions are.

- Click on the properties icon located among the actions buttons of a document
- Select “Comments”
- Fill in the fields Title, Summary and Description (only Title field is sufficient)
g. How to create a discussion

Discussions could be used for an information exchange like a forum. An example of this could be frequently asked questions

- In the ‘Add...’ menu select ‘Discussion’
On the “Add Discussion” page fill in Title, Description, Summary
- Click on “Add Topic” to add a new question or a new topic

- Click on “Apply” to save the new topic

- To reply click on “Reply”
6. How to change the location of an object (move an object)

In order to modify the location of an object follow the steps below:

- Click on the properties icon located among the actions’ buttons of a document
- Click on ‘location’ and enter the name of the collection you would like to move the object to
- Click on “Add” once the desired collection appears
- Click on “Update Locations”

It is also possible to use standard Windows functions such as “Copy-Paste” or “Cut and Paste” to change an object’s location. In order to do that, select the checkbox next to the object you would like to change the location of and from the “Edit Selected” menu select “cut”, next go into the collection or the location where you would like to paste your object and select “paste” from the same “Edit Selected” menu.
Confirm Cut and Add to Clipboard

- Clear clipboard before adding new cut objects?
- CONFIRM

Confirm Paste Objects From Clipboard To

- Clear clipboard after paste?
- CONFIRM
7. Search in DocuShare

DocuShare possesses a powerful and fast search engine. The search engine not only searches throughout the files but also within a document.

a) Simple Search and Advance Search

Example 5: Simple search of the word “example”

- On the top right corner of the page, enter the word “example” in the search box and click on the “Search” button

Example 6: Advanced Search

- Click on “Refine Search”
- Specify more settings for your search (Type of object to search, date, type of documents etc.)

b) Save a Search Query

Example 6: Save a search query

- From the ‘Add...’ menu select « SavedQuery »
- On the “Add SavedQuery” page enter the title of the query to be saved as well as other details (summary, description, etc.)
8. Permission Management
   a. How to modify permissions of an object

Permissions in DocuShare are extremely powerful because they can be specified down to the file level and not just at the collection level. By default all objects inherit permissions from the parent object. For example the collection “Example1” by default has the same permissions as the collection “Sandbox” because “Sandbox” is the parent collection.

Example 7: How to modify permissions to the collection “Example1”

- Click on the properties icon located among the actions buttons of the collection “Example 1”
- Click on “permissions”. The section ‘Permissions’ shows you all users who have access to that collection as well as their permission type
- Click on “Change Access List”

- By default the “Show” section has the option “Users” selected. If you would like to add a group instead, select the option “Groups”
- In the “Search” field type in name of the user to whom you would like to give access
- Once the name appears in the field “Possible Users/Groups” select it and click on the “Add” button
- Click on “Update Access List”
- Next click on “Apply” to save your changes

**Note:** Whenever a user or a group is added to the access list, by default DocuShare gives them “Reader” permissions. If you would like to give more access, simply click on the check boxes of the corresponding access type

- Once done click on “Apply” to save your changes
b. How to change the owner of an object

- Click on the properties icon located among the actions buttons of the collection “Example 1”
- Click on “Permissions”. In the “Owner” field click on “Change Owner”

- In the “Search” field type in the name of the user you would like to put as owner
- Click on “Update Owner” once done

- Click on “Apply” to save your changes
c. How to create a Group

Every user can create a group in DocuShare. This feature is open and accessible to anyone with a DocuShare account. To create a group:

- Click on the “Users and Group” tab located in the footer of page.

- On the page “Users and Group”, click on “Add Group” from the left menu.

- Fill in the relevant fields such as Title (mandatory), description, summary, etc.
- Click on “Apply” to save the group.
- Finally, add members to the newly created group by using the search box to find users and buttons such as “Add” or “Remove” to add or remove users.
9. DocuShare Drive

In this section, you need to have the DocuShare client application installed on your machine. If you do not have the DocuShare Drive installed, please request it by contacting the IT helpdesk centre on 6555.

   a. Map a server

Mapping a server allows user to have access to a DocuShare site from the client using the windows explorer and not the web.

- Open the Windows tray by clicking the arrow on the Windows bar. Right click on the DocuShare icon as indicated on the image.

- As the menu opens click on “Map Server”.

- Enter the DocuShare website URL: [https://web32.uottawa.ca/documents](https://web32.uottawa.ca/documents) for all employees and [https://web32.uottawa.ca/prs](https://web32.uottawa.ca/prs) for Facilities employees.

- Click « Next » and enter your username and password information.

- Click “Next”
- Click “Next”.

- Click “Finish” to save your mapping.
b. Add a document

To add a document, you can simply perform the actions of copying, pasting or dragging and dropping a document.

c. Add a Collection

To add a document, you can simply perform the actions of copying, pasting or dragging and dropping a collection or folder.

d. Working with a document
   i. Checkout/check-in

The check out and check in functionality in DocuShare allows multiple users to work on a single document consecutively while keeping all versions in a single file. To work on a file with others use the checkout option. This option will lock the document for other users for editing. Follow the steps below

- Right click on the document you want to edit and select “Check Out” or select “Check Out” from the explorer menu (This action will open the file in editing mode)
- Once you are done with the changes click on the “Save” button and close the document. (Caution: wait for the popup window to appear otherwise all your information will be lost)
- A pop up to “checkin” the document appears with a comment box.
- Click “Finish”

ii. Check out/check in from the web (Internet Explorer)
- Open Internet Explorer and login to DocuShare. While in DocuShare, go to the document you would like to modify and click on the ‘check-out’ button. This will open the document in edit mode.
- Once you are done making changes, press the ‘save’ tab then close the file and wait for the popup “DocuShare Checkin Wizard”.
- Add comments (optional) and then click on “Finish” to save your modified document directly into DocuShare.