



DoxShare User Manual

PDMS

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Table of Contents

1.1 Change History	3
2 Terms of Reference	4
3 DoxShare	5
3.1 DoxShare Home Page and Documents	5
3.2 Login, Logoff and Password Recovery	6
3.2.1 Login	6
3.2.2 Forgotten Password	7
3.2.3 Log Off	8
3.3 MyDoxShare	9
3.3.1 User Details	9
3.3.2 Change Password	9
3.3.3 Change Memorable Word	10
3.4 Browsing DoxShare	11
3.4.1 Document Portal Page	11
3.4.2 DoxShare Navigation Methods	12
3.4.3 DoxShare Icons	12
3.5 DoxShare Folders	13
3.5.1 Folder Contents / Document Lists	13
3.5.2 Search Functions	15
3.5.3 Viewing Folder Attributes	15
3.5.4 Adding a Sub-Folder	16
3.5.5 Editing a Folder's Details	18
3.5.6 Deleting a Folder	19
3.5.7 Moving a Folder	20
3.6 Documents in DoxShare	21
3.6.1 Browsing Documents	21
3.6.2 Searching for Documents	22
3.6.3 Viewing Information about a Document	23
3.6.4 Viewing a Document	25
3.6.5 Uploading a Document	26
3.6.6 Editing a Document's Details	27
3.6.7 Replacing a Document	27
3.6.8 Deleting a Document	29
3.6.9 Downloading Changed Documents	30
4 DoxShare Personal	31
4.1 Introduction to DoxShare Personal	31
4.2 Installation of DoxShare Personal	32

4.3 Configuration of DoxShare Personal	34
4.3.1 General DoxShare Personal Settings	34
4.3.2 Remote Server Connection Settings for DoxShare Personal	35
4.3.3 DoxShare Personal Synchronisation Schedule	37
4.3.4 DoxShare Personal License	38
4.4 DoxShare Personal Main Window	40
4.4.1 Configuring a Folder for Automatic Download	41
4.4.2 Downloading and Viewing Documents	42
4.5 DoxShare Personal Menus	44
4.5.1 File	44
4.5.2 Tools	44
4.5.3 Help	45

1.1 Change History

DOXSHARE Version	Summary of changes	Date
1.0	User Manual version 1	02/04/2012
1.3	Various, including CDP Personal	31/05/2012
1.5	Updated to include changes introduced on versions 1.4 and 1.5	02/10/2012
2.0	Updated to include changes introduced in CDP Version 2.0, e.g: forgotten password recovery; memorable word;	25/02/2012
2.1	Updated to include changes introduced in CDP Version 2.1	20/11/2013
2.2	Changed references from Controlled Document Portal (CDP) to DoxShare – images not updated yet though	07/04/2014

2 Terms of Reference

DoxShare is a software application and secure data repository provided by PDMS on a resilient, managed, Software-as-a-Service basis.

(Please note that DoxShare was previously called the Controlled Document Portal (“CDP”) and some images in this document still include references to the CDP and CDP Personal).

DoxShare enables you to centrally store, edit and share documents with your various stakeholders, in a controlled way, no matter where they are in the world. Key features of this secure system include a simple folder-based filing structure, with document version controls, audit trails and search features, and sophisticated access/permission settings that your Administrator(s) can manage for each User of the system. Hosting, backups and upgrades are taken care of by PDMS as part of the monthly subscription package.

DoxShare can be accessed via web-browsers using a secure connection from anywhere with Internet access. It is optimised for Internet Explorer (version 8 and above), and the latest versions of Firefox, Safari and Chrome.

Depending on how your network is set up, you may also be able to use Windows File Explorer to access DoxShare folders. If permitted by your organisation, you will be able to access folders and documents stored in DoxShare via a network drive in the same manner that you access other network resources.

DoxShare Personal is an application which, once installed and configured, connects to DoxShare server and downloads and stores the documents available to a user on their computer. Downloaded documents can then be viewed even when an Internet connection is not available.

This manual provides guidance for the use of DoxShare and DoxShare Personal. For further resources and important information, please visit www.pdms.com/DoxShare/resources

Note: Images have been included in this manual as a visual prompt to help locate the item in the application. As DoxShare is enhanced, and as the interface to may have been tailored to suit your organisation, some controls may have a different appearance and location in your version of the application to those illustrated in this manual. Their behaviour, however, will be consistent with that described.

To facilitate identification of the control or icon being explained, red circles/ovals overlaying images of the system have been used as highlights, e.g. item of interest.

3 DoxShare

3.1 DoxShare Home Page and Documents

The Documents displayed on the DoxShare Home Page are those Documents within DoxShare marked as “Visible without login”. These Documents are available to **all** Home Page visitors for viewing and downloading without need for authentication.

The Documents displayed can be filtered by Document Type by choosing the required Document Type from the displayed drop-down, and selecting the Go command button.

The screenshot shows the PDMS DoxShare Home Page. At the top, there is a navigation bar with 'Home', 'About', and 'Login' links. Below this, a heading reads 'Access your document from anywhere in the World!'. A paragraph explains that the Controlled Document Portal (CDP) allows access to documents from anywhere with an internet connection. It lists features such as file structure, search, version control, auditing, reporting, and security management. Below this is a 'Public Documents' section. It features a 'Document Type' dropdown menu currently set to 'All' and a 'Go' button. Below the filter is a table of document records. The table has columns for Name, Description, and File Size. The records listed are:

Name	Description	File Size
Brochure - Manx Grads - flyer_grads	Brochure - Manx Grads - flyer_grads	2.9mb
Brochure - Public Sector Brochure - 2009	Brochure - Public Sector Brochure - 2009	1.2mb
CDP User Manual	Manual for standard users of the CDP	2.8mb
CDP WebDav User Manual	CDP user manual regarding webdav features only	490.6k
eGaminigleaflet	eGaminigleaflet	4mb
MARIS	MARIS	3.1mb
Recipe	asdasdad	19.4k

At the bottom of the page, it says 'DEMONSTRATION SYSTEM Controlled Document Portal' and '© Copyright PDMS Ltd 2012'.

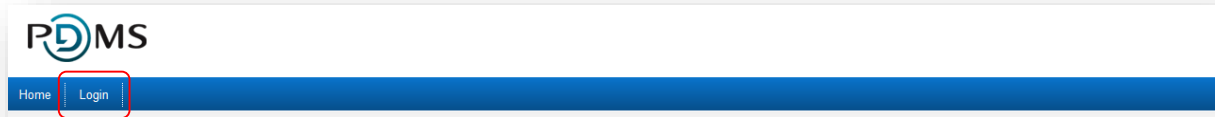
Notes:

1. If no Documents are marked as “Visible without login”, then no documents will be displayed on the Home Page.
2. Visitors to the Home Page cannot view any other documents, or perform any other DoxShare functions, without logging in to DoxShare.

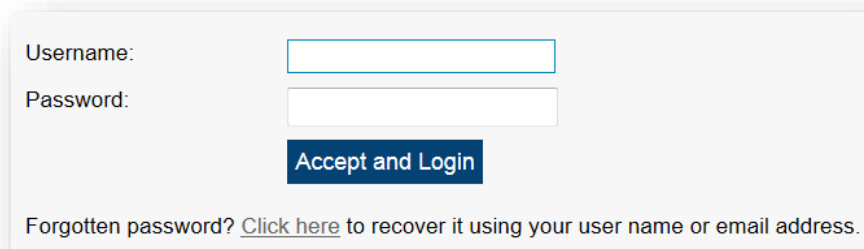
3.2 Login, Logoff and Password Recovery

If your DoxShare instance is integrated with another sign on system (e.g. Active Directory, OAuth). The Login, Logoff and Password Recovery process may not apply or may function differently.

3.2.1 Login



The Login link, at the top left of the Home Page, displays the Login page via which, by entry of the Username and Password combination supplied to you in the first instance by your DoxShare Administrator, you can access DoxShare.

A screenshot of the PDMS Login page. It features two input fields: 'Username:' and 'Password:'. Below these fields is a blue button labeled 'Accept and Login'. At the bottom, there is a link: 'Forgotten password? [Click here](#) to recover it using your user name or email address.'

- Notes:
1. At first Login, or on expiry of your Password, you will be prompted to enter a new Password. Your organisation's DoxShare Security Policy may require that your Password conforms to its Password Security Settings (see **3.3.2 Change Password**).
 2. At first Login, you will be prompted to enter a Memorable Word for use during the forgotten Password process. You can change your Memorable Word at any time (see **3.3.3 Change Memorable Word**)

3.2.2 Forgotten Password

If you are unable to remember your Password, click the [Click here](#) link. This will open the Password Assistance – Account Details window.

Password Assistance - Account Details

Please enter either your username or your email address.

User Name

Email Address

Having problems recovering your password? Please contact your administrator at admin@mycdp.cdp.pdms.com

Enter either your User Name or Email Address and press the Next command button.

This will open the Password Assistance – Account Verification window.

Password Assistance - Account Verification

User Name John.Smith

Email Address

Please enter the following characters from your memorable word.

Character 7 Character 15

Having problems recovering your password? Please contact your administrator at admin@mycdp.cdp.pdms.com

Enter the appropriate characters from your memorable word, and press the Send Recovery Email command button. An email will be sent to the email address registered with DoxShare for your account. The email will contain a link; clicking on the link will open the Recover Account – Enter a new password window.

Recover Account - Enter a new password

Username John.Smith

New Password *

Confirm New Password *

Having problems recovering your password? Please contact your administrator at admin@mycdp.cdp.pdms.com

Enter and confirm your new Password; note that your organisation's DoxShare Security Policy may require that your Password conforms to its Password Security Settings (see **3.3.2 Change Password**). Press the Change Password command button. You will then be able to logon using your new Password.

Note: If for any reason you are unable to complete this process, then send an email to your registered DoxShare Administrator by clicking the link displayed in each window.

3.2.3 Log Off

You can exit DoxShare from any window in the system by selecting the Log Off link.



3.3 MyDoxShare

The MyDoxShare menu option displays further menu options to review and change your personal and security information.

3.3.1 User Details

The User Details menu option displays your account details.

If you have permission, you can change these as appropriate by pressing the Edit command button.

Account Details	
Individual Title	Mr
First Name	John
Surname	Smith
Email Address	john.smith@mycdp.cdp.pdms.com

3.3.2 Change Password

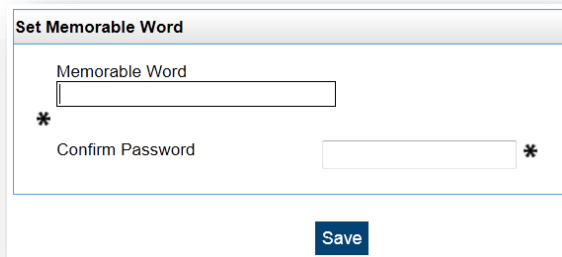
To change your Password, click the Change Password menu option.

Enter your old (existing) Password, and enter and confirm your new (required) Password twice.

Press the Save command button.

- Notes:
1. Your organisation's DoxShare Security Policy may require that your new Password conforms to its Password Security Settings. This may mean that:
 - your Password must contain one or more of; a lower and upper case letter, a number, a symbol;
 - you must change your Password after a certain number of days.
 2. When your Password expires, you will automatically be directed to this Change Password window.

3.3.3 Change Memorable Word



The screenshot shows a dialog box titled "Set Memorable Word". It contains two text input fields. The first field is labeled "Memorable Word" and is empty. The second field is labeled "Confirm Password" and is also empty, with an asterisk (*) to its right. A blue "Save" button is positioned at the bottom center of the dialog box.

Your Memorable Word is used during the forgotten Password process.

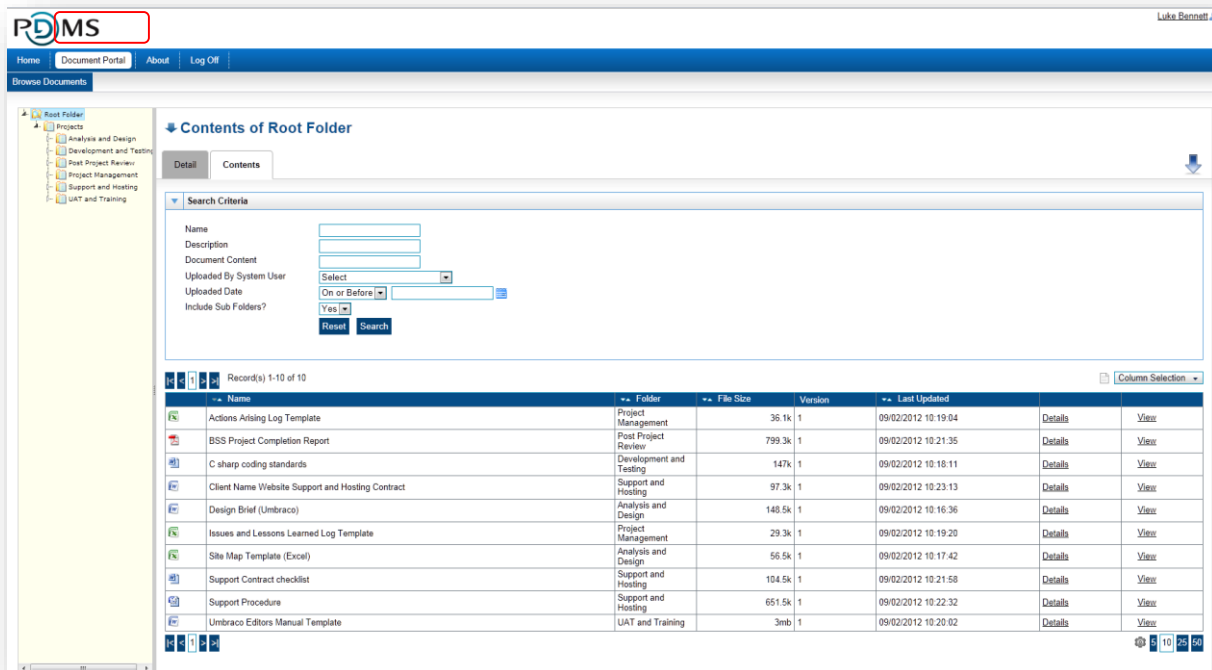
To set/change your Memorable Word, click the Change Memorable Word menu option.

Enter your Memorable Word and your Password, and click the Save command button.

3.4 Browsing DoxShare

3.4.1 Document Portal Page

Once logged in to DoxShare, the Document Portal page is displayed. This is split into two sections:



The **left hand side** of the page displays a hierarchical 'tree' structure of the Folders and Documents stored in the system. The Folders and Documents can be navigated, expanded and collapsed either by clicking on them and the arrow icons displayed next to them, or by using the arrow keys on the keyboard. Note that the Folders displayed will be filtered to only those that you have permission to see.

The **right hand side** of the page displays the relevant details of the selected Folder or Document, as described below.

Note that the Document Portal page can be accessed from anywhere in the system by selecting the **Document Portal** link.

3.4.2 DoxShare Navigation Methods

To navigate around DoxShare, “left click” once on the tab, folder, icon or link you wish to view.

In the details view on the right hand side, left click the appropriate icon to perform the activity you wish to undertake, including edit a folder, add a folder, delete a folder, upload a document and download changed documents.

A list and descriptions of the icons used in DoxShare are provided below.




































In the tree view on the left hand side, you can also “right click”:

- **on a folder** to see and select options to add a sub folder, edit the folder, delete the folder and upload documents to a folder; and
- **on a document** to see and select options to view the document’s history, edit the document’s details, delete the document or replace the document.

Note: The availability of the above described functions to a particular User will depend on the permissions assigned to that User by a DoxShare Administrator.

3.4.3 DoxShare Icons

The following table describes the meaning of the icons used within DoxShare web-application (two icons are shown where they differ between themes).

Icon	Function	Icon	Function
 or 	Edit Folder		Export to CSV
 or 	Add Sub-Folder	 or 	Delete Folder
 or 	Upload Document	 or 	Download Changed Documents
 or 	View Document	 ..or 	Edit Document Details
 or 	Replace Document	 or 	Delete Document
	Expand		Collapse
	Go to First		Go to Last
	Previous Page		Next Page
	Selected Page		Next page of data Ex 2
	Change Sort Order of Column Assending		Change Sort Order of Column Descending
	Save Preferences		Number of lines per page
	Add Item		Delete Item
	Move Up		Move Down

3.5 DoxShare Folders

The availability of the following functions to a particular User will depend on the permissions assigned to that User by a DoxShare Administrator.

3.5.1 Folder Contents / Document Lists

The Contents tab for a particular folder will provide a list of the Documents it contains, along with Document Search features.


The following image shows the contents of a Folder in DoxShare, or, in other words, a “Document List”:

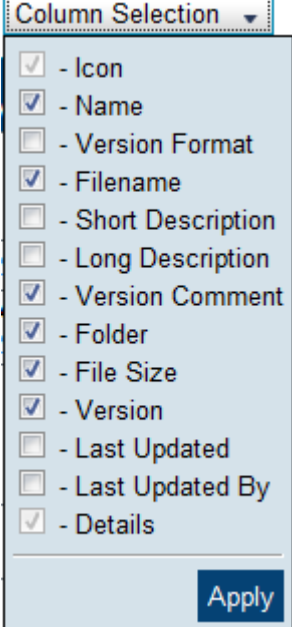
Name	Folder	Version	Last Updated	Details	View
BS EN ISO 9001:2008	Standard Documents	2008	07/02/2012 11:55:00	Details	View
ISO Standards Overview – Sales	Staff Training and Information	1	07/02/2012 12:03:38	Details	View
ISO Standards Overview	Staff Training and Information	1	07/02/2012 12:08:15	Details	View
4.2.3 Controlled Document Content and Layout	Procedures Processes	1	07/02/2012 12:58:28	Details	View
ISO IEC 27001	Standard Documents	1	07/02/2012 13:06:23	Details	View
LICENSING OF WASTE DISPOSAL REGULATIONS 1990	Manx Legislation	1990	07/02/2012 13:25:19	Details	View
PPG2 - Oil Storage	UK Legislation	August 2011	07/02/2012 13:27:18	Details	View
Lead Developer	Job Descriptions	1	07/02/2012 14:18:48	Details	View
Project Manager	Job Descriptions	1	07/02/2012 14:18:51	Details	View
PDMS Application Form	Application, Consent and Vetting Forms	1	07/02/2012 14:36:22	Details	View

Unless otherwise specified, all Document Lists, as illustrated above, will:

- Include navigation buttons for “First Page”, “Previous Page”, “Next Page” and “Last Page”;
- Include page number links to allow direct navigation to particular pages;
- Include an indication of the total number of rows available for viewing in the list, e.g. “Records 1 – 10 of 432”;

- Include the ability to change the sort order of the content within certain columns;
- Display 10 rows per page by default, but will allow the specification of different page sizes of 5, 10, 25 or 50 rows;
- Allow different columns to be shown or hidden using the “Column Selection” drop down list, by “checking” or “un-checking” the box next to the column heading and clicking the “Apply” button.


Note that your current column and sort selections can be saved by clicking the  icon next to the rows per page selector. Next time you log in to DoxShare, the list screen will default to these saved settings.

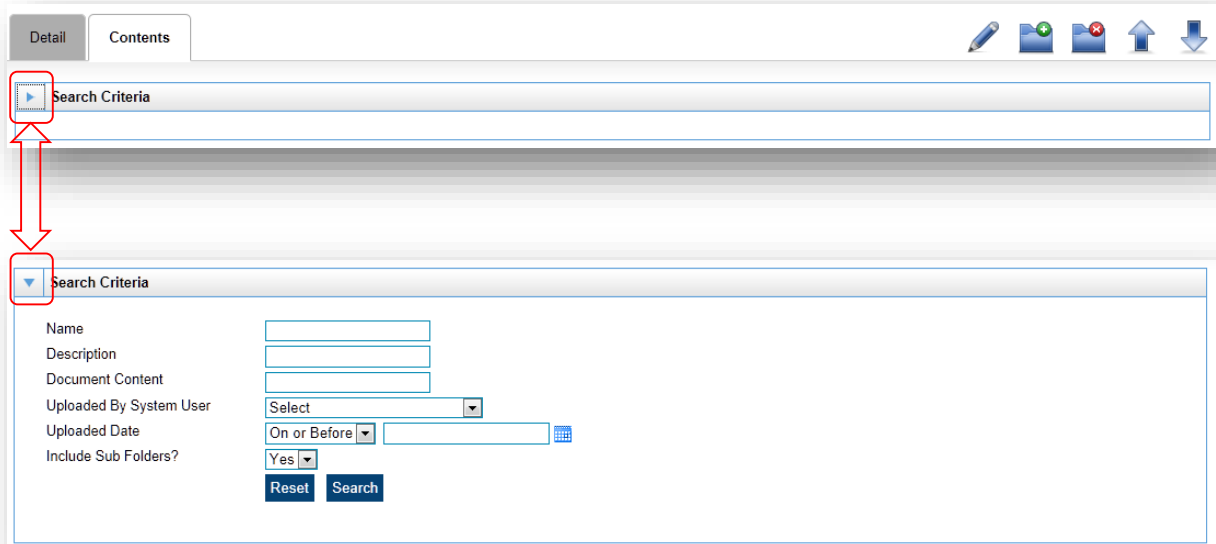



Column Selection
<input checked="" type="checkbox"/> - Icon
<input checked="" type="checkbox"/> - Name
<input type="checkbox"/> - Version Format
<input checked="" type="checkbox"/> - Filename
<input type="checkbox"/> - Short Description
<input type="checkbox"/> - Long Description
<input checked="" type="checkbox"/> - Version Comment
<input checked="" type="checkbox"/> - Folder
<input checked="" type="checkbox"/> - File Size
<input checked="" type="checkbox"/> - Version
<input type="checkbox"/> - Last Updated
<input type="checkbox"/> - Last Updated By
<input checked="" type="checkbox"/> - Details

Apply

3.5.2 Search Functions

When the list of documents in a folder is viewed, by default the search criteria pane will be displayed in its collapsed state. To use the search  controls, click on the command to expand the search pane and reveal the search criteria:

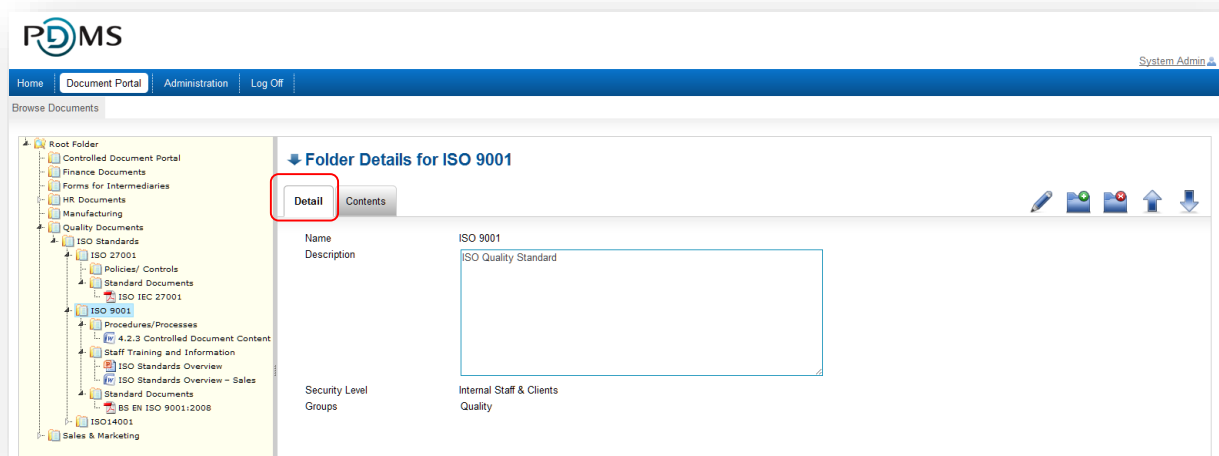


To collapse the search pane, click on  the command.

More information on the features of the search is provided in the Searching for Documents section below.

3.5.3 Viewing Folder Attributes

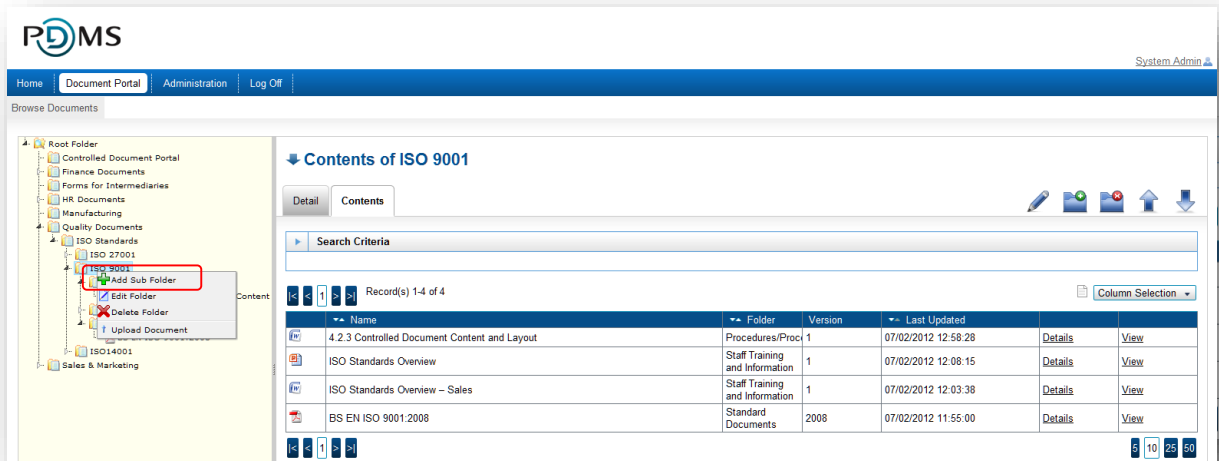
The attributes of the selected Folder can be viewed by selecting the **Detail** tab.



3.5.4 Adding a Sub-Folder

There are two ways to add a sub-folder to the currently selected Folder. Either:

1. Right click on the folder in the tree view and choose the “Add Sub Folder” option from the pop-up menu that is displayed; or



2. Select the “Add Sub Folder” command button that is displayed in the right hand pane.

The Add Sub-Folder page will be displayed to allow you to enter the details of the new sub-folder.

The information/fields required for creation of the new folder are listed in the table below; mandatory fields are marked with an asterisk as shown above.

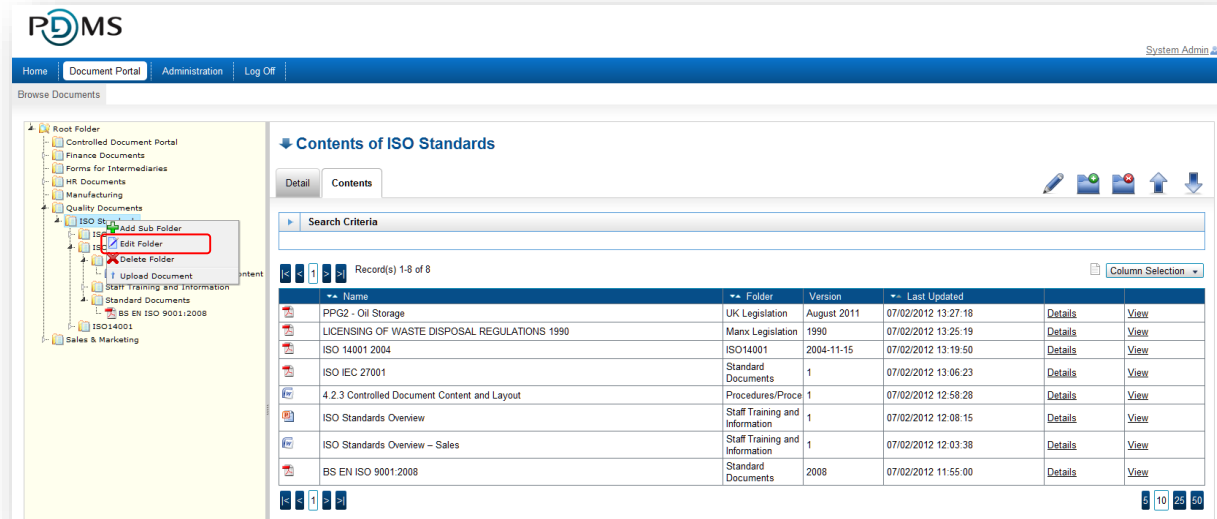
Field	Details	Notes
Name	The name of the sub-folder as it is to appear in the tree.	Folders within a parent folder must be unique. Maximum length = 100 characters.
Description	A longer description of the purpose of the folder.	Maximum length = 2000 characters
Security Level	The level of user that the contents of the folder should be available to.	This security level cannot be lower than that of any of its ascendant/ higher level folders (parent, grandparent etc.).
Groups	These are your functional business groups e.g. Finance, Human Resource, etc. These groups can then be used on the folders to restrict access in conjunction with user classification clearance	Select from the list of available groups Additional groups can be set up by your DOXSHARE administrator

When all details are entered, select Save. The new folder will be created and appear in the tree on the left of the screen.

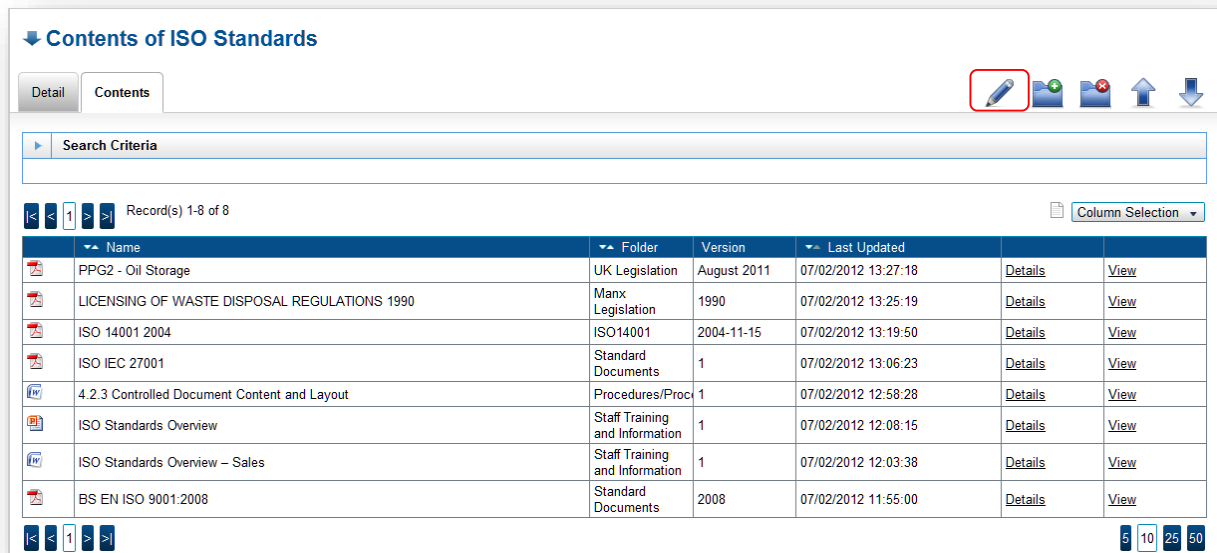
3.5.5 Editing a Folder's Details

There are two ways to add a sub-folder to the currently selected Folder. Either:

1. Right click on the folder in the tree view and choose the "Edit Folder" option from the pop-up menu that is displayed; or



2. Select the "Edit Folder" command button that is displayed in the right hand pane.

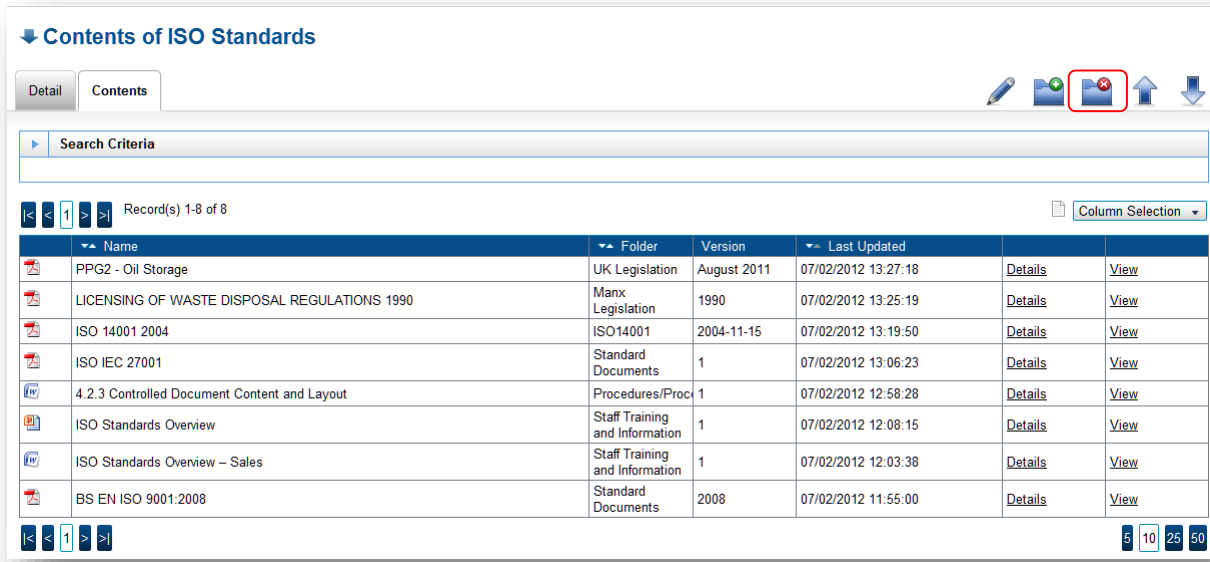


The folder details will be shown and can be edited. The edited fields must still comply with the validation rules described in the Adding a Sub-Folder section of this manual.

3.5.6 Deleting a Folder

There are two ways to delete a sub-folder from the currently selected Folder. Either:



1. Right click on the folder in the tree view and choose the “Delete Folder” option from the pop-up menu that is displayed; or
2. Select the “Delete Folder” command button that is displayed in the right hand pane.

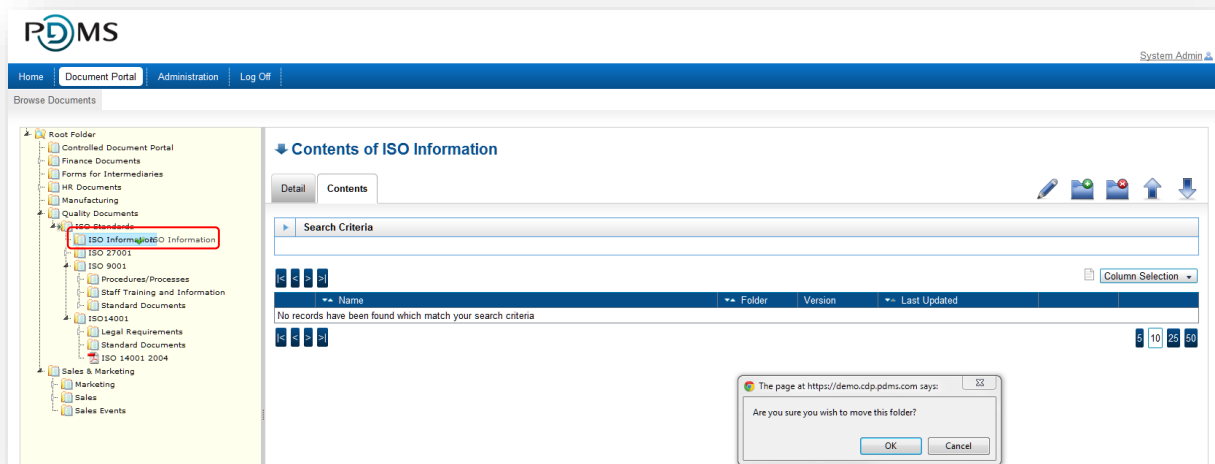


A confirmation message will be shown, explaining that all the Documents contained in the folder will be deleted, with a list of the names of those documents. Click the “Confirm” button for the deletion to proceed.

Note: A Folder cannot be deleted if it contains sub-folders.

3.5.7 Moving a Folder

A Folder can be moved to another parent Folder by dragging-and-dropping it within the tree view. Whilst it is being dragged, a  icon is displayed to indicate that the Folder cannot be dropped into the underlying Folder (e.g. a folder cannot be dragged into one of its own sub-folders). The icon changing to a  indicates that the Folder can be dropped into the underlying Folder. Prior to moving the Folder, a confirmation dialogue will be displayed.



When a folder is moved it will retain its existing Security Groups. Please note that because the security groups work in a hierarchical manner (e.g. you can only view the contents of a folder if you have one of more of the security groups assigned to that folder and also the appropriate security groups to see all the parent folders of that folder) moving the folder may affect its visibility.

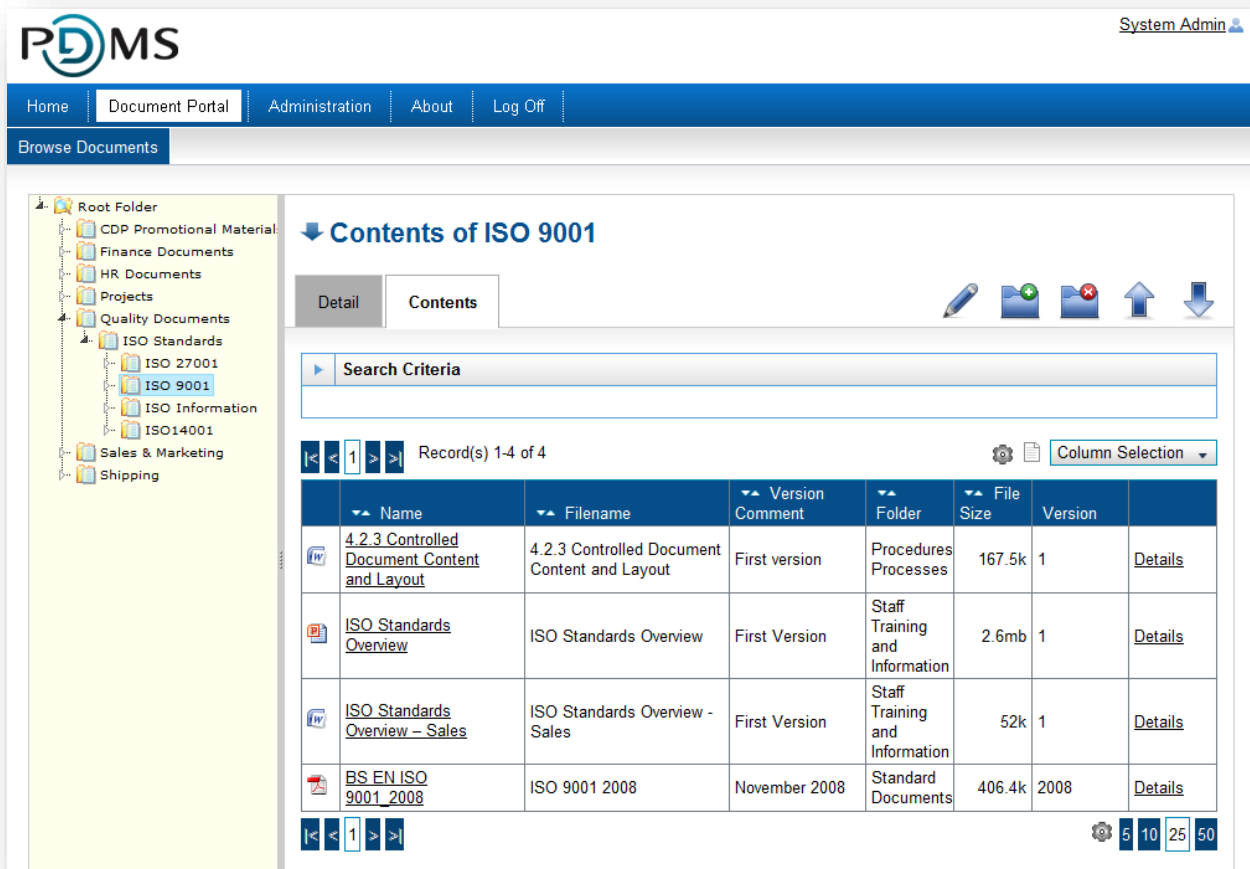
Note that Folder names must be unique within a parent Folder. A warning will be displayed if a Folder of the same name already exists in the new parent Folder, and the move will be prevented. The name of one of the Folders will need to be changed to allow the move.

3.6 Documents in DoxShare

The availability of the following functions to a particular User will depend on the Security Group(s) and Document Classification Clearance assigned to that User by a DoxShare Administrator.

3.6.1 Browsing Documents



When a Folder is selected from the tree, the right hand side of the Document Portal page displays the **Contents** tab containing a list of the Documents contained within the Folder **and** its sub-folders (N.B. whether sub-folders are included or not can be changed by altering the



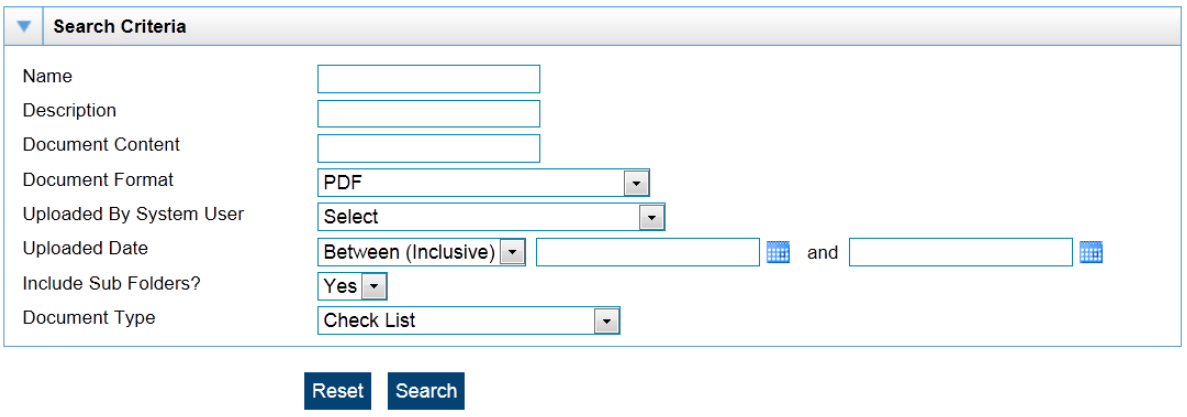
search criteria, the default setting of this search variable is this behaviour is controlled by a system setting so may have been altered by your system administrator)

The Documents can also be seen in the hierarchical folder tree-view in the left hand side.

3.6.2 Searching for Documents

The **Search Criteria** pane of the **Contents** tab can be used to search the Documents contained within a Folder and, if specified, its Sub-Folders. Clicking on the  command will reveal the Search Criteria controls; clicking on the  command will hide them.

The criteria on which a search will be performed are:

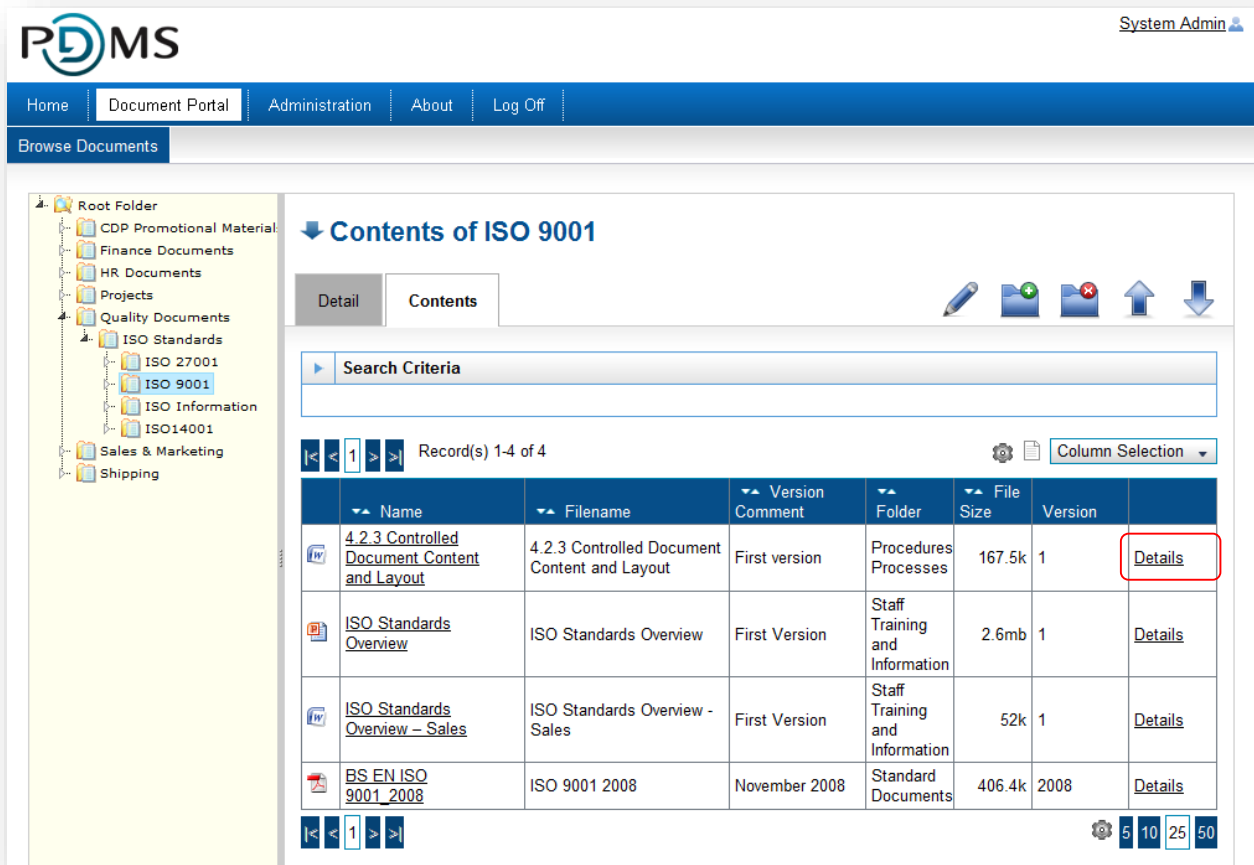


- **Name** – the whole or a part of the Document Name;
- **Description** – the whole or a part of either the Short or Long Description;
- **Document Content** – a word or phrase that forms a part of the Content of the Document (note: not all Document formats can be indexed);
- **Document Format** – the format (e.g. PDF) of the current version of the Document;
- **Uploaded By System User** – the User who uploaded the Document;
- **Uploaded Date** – a Date prior to or subsequent to which the Document was uploaded;
- **Include Sub Folders** – whether Documents from sub-folders are to be included in the results;
- **Document Type** – the type of document as selected by the user.

Note: The Search Criteria may include controls for any Additional Fields specific to your instance of DoxShare as set up by your DoxShare Administrator.

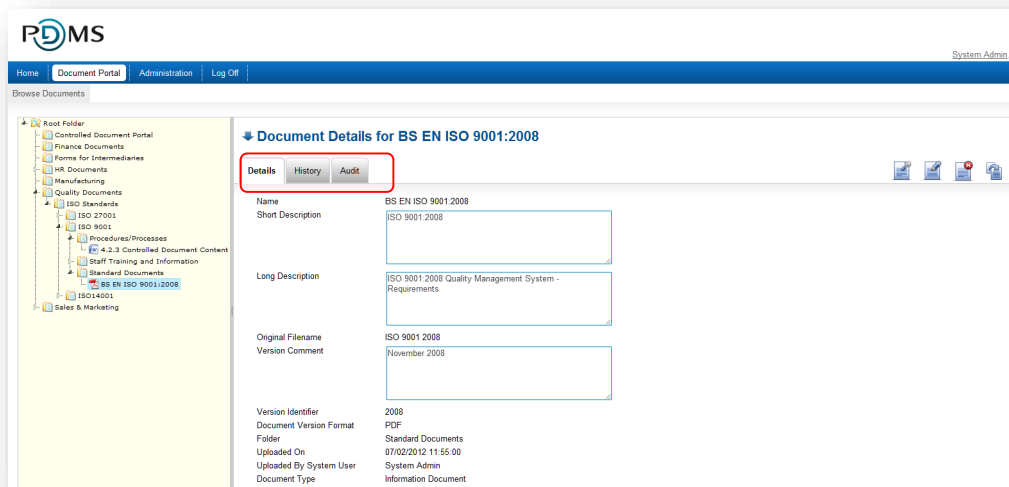
3.6.3 Viewing Information about a Document

The information about a Document can be viewed by either clicking on the Document in the folder tree-view, or by selecting the “Details” option displayed against the Document in the Folder contents list.



Depending on your permissions, the information about the document is displayed on tabs, including:

- **Details** – including information supplied by the User who uploaded the Document, which can subsequently be edited (see below);
- **History** – a historical list of the document versions;
- **Audit** – information about who has performed what actions on the Document.



3.6.3.1 Document Details

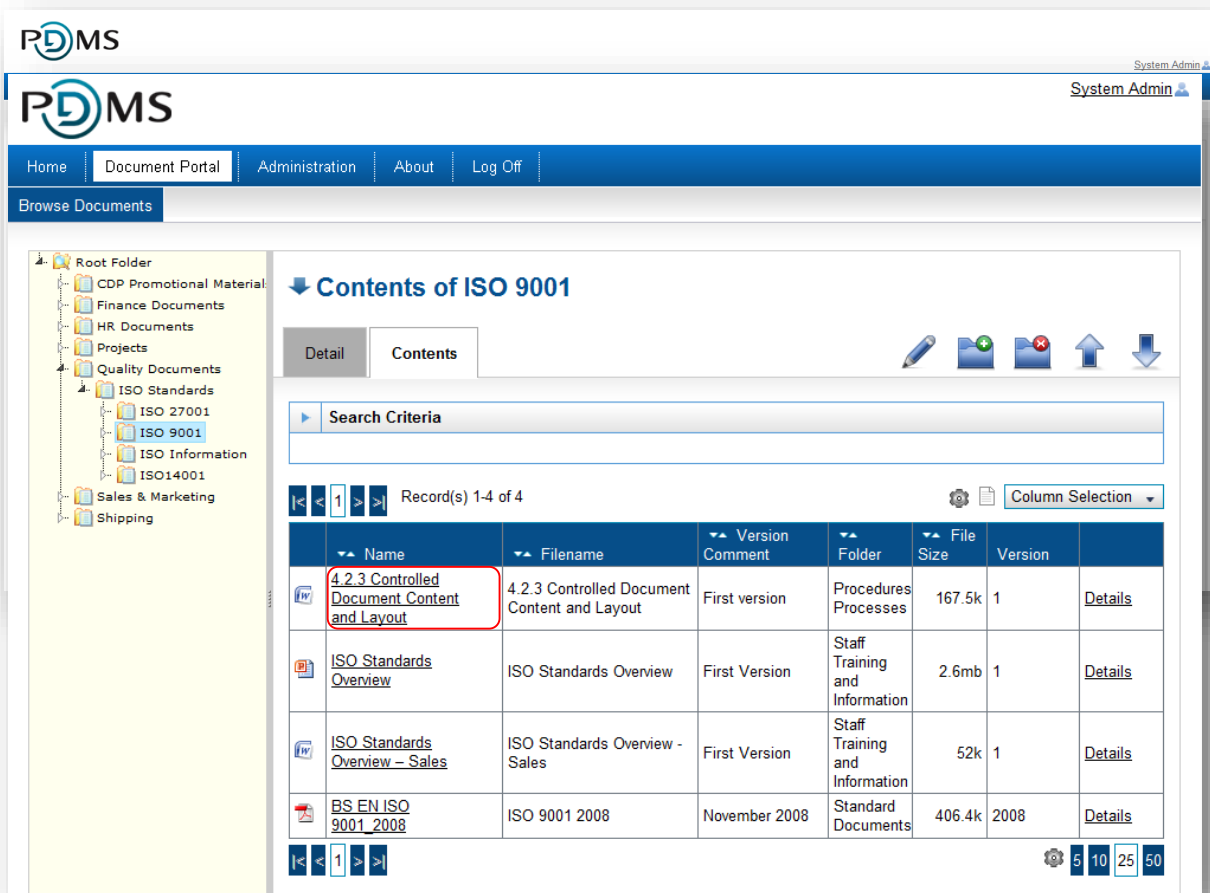
The Document Details, as displayed in the image above, are either provided by system Users, or automatically set by the system as follows.

- Provided by system Users:
 - **Name** – an identifier for the document, which may or may not be the same as the name of the original file that was uploaded;
 - **Short Description** – information about the document;
 - **Long Description** – more information about the document;
 - **Version Comment** – information relating to this particular version of the document;
 - **Version** – information identifying this particular version of the document;
 - **Document Type** – the type of document as chosen by the uploader;
 - Visible without login – specifies whether the Document will appear on DoxShare Home Page and can be viewed by unauthenticated Users;
 - Any other **Additional Fields** specific to your instance of DoxShare as set up by your DoxShare Administrator.
- Automatically set by the system:
 - **Original Filename** – the name of the file that was uploaded;
 - **Document Format** – the file format of the document version (e.g. PDF, DOC) (note that the file format may be different for different versions of the same Document);
 - **Folder** – DoxShare Folder into which the document version was uploaded;
 - **Uploaded On** – the date and time the document version was uploaded;

- **Uploaded By System User** – who uploaded the document version.
- **Document URL** – URL which can be given to non-authenticated users to access the document (N.B. this only appears if the document is marked as “Visible without login”).

3.6.4 Viewing a Document

A Document can be viewed by clicking the “View Document” command button that is displayed in on the Document Details screen when a Document is selected in the tree-view.

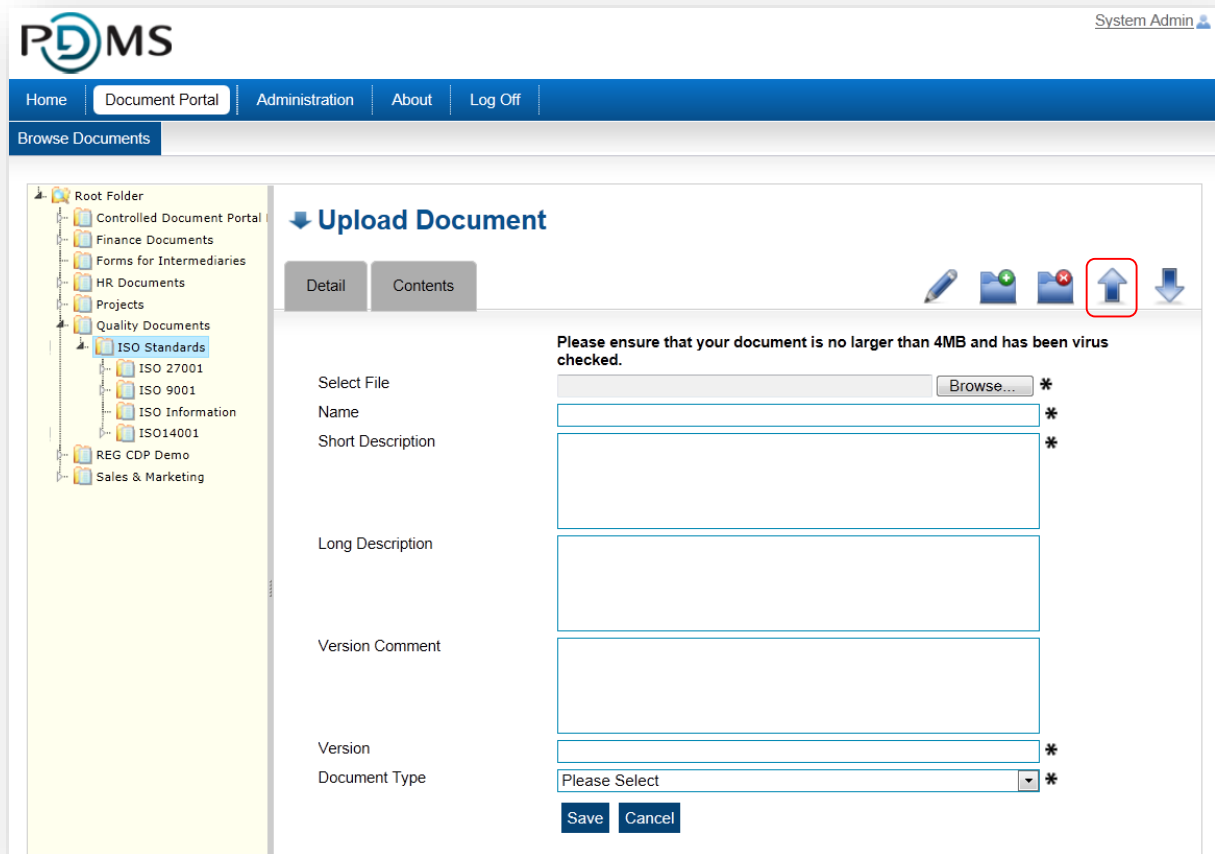


Clicking the document name in the Folder Contents view will also download the document.

Where the document is downloaded to will depend on your computer settings (e.g. you may be prompted for a location or all documents may be downloaded to your default “Downloads” folder). The appropriate application can then be used to open the document e.g. Microsoft Word or Adobe Acrobat Reader.

3.6.5 Uploading a Document

A new Document is uploaded to DoxShare by selecting the desired Folder in the tree-view and clicking the “Upload Document” command button displayed in the right hand pane, resulting in the display of the **Upload Document** pane.



Clicking the **Browse** command button will result in the display of a “Choose File to Upload” (or similar) dialogue, allowing you to choose the file to upload. Then enter the User specified **Document Details** (see above) and click the **Save** command button.

Notes:

1. The Name and Description attributes are used by DoxShare Search functions, so set their values appropriately.
2. Depending on your organisations policy, a maximum file size may have been set. If so, this will be displayed on the **Upload Document** pane.

3.6.6 Editing a Document's Details

A Document's details can be changed by clicking the "Edit Document Details" command button displayed in the right hand pane.







The User specified **Document Details** (see above) can be changed as required and saved by clicking the **Save** command button.

Note:Editing a Document's details will not create a new document version, but will create an audit record.

3.6.7 Replacing a Document

The current version of a Document can be replaced by the clicking the "Replace Document" command button displayed in the right hand pane, resulting in the display of the **Replace Document** pane.

↓ Replace Document ISO 14001 2004

Details	History	Audit				
---------	---------	-------	---	---	---	---

Please ensure that your document is no larger than 4MB and has been virus checked.

Select File

*
Name *

Short Description *

Long Description

Version Comment

Previous Version

Version

Document Type *

Again, clicking the **Browse** command button will result in the display of a “Choose File to Upload” (or similar) dialogue, allowing you to choose the replacement file to upload. The User specified **Document Details** (see above) can be changed as required, and saved by clicking the **Save** command button.

Note: A Document in one format can be replaced by a Document in another.

3.6.8 Deleting a Document

A Document can be deleted by the clicking the “Delete Document” command button displayed in the right hand pane; confirmation of the delete will be required.



3.6.9 Downloading Changed Documents

The Download Changed Documents function provides the facility by which you can view all the Documents you have previously downloaded and which have subsequently been updated in DoxShare with their later versions.

The screenshot shows the PDMS web interface. The top navigation bar includes 'Home', 'Document Portal', 'Administration', 'About', and 'Log Off'. The 'Document Portal' is selected. Below the navigation bar, there is a 'Browse Documents' section. On the left, a tree view shows the folder structure, with 'ISO Standards' expanded to show 'ISO 14001'. The main content area is titled 'Download Changed Documents' and has two tabs: 'Detail' and 'Contents'. The 'Contents' tab is active, displaying a table of documents. The table has the following data:

Name	Folder	File Size	Version	Last Updated
4.2.3 Controlled Document Content and Layout	Procedures Processes	167.5k	1	17/09/2012 14:16:17
ISO 14001 2004	ISO14001	286.6k	2004-11-15	17/09/2012 11:48:16

At the bottom right of the table, there are two buttons: 'Download Documents' and 'Cancel'. The 'Download Documents' button is highlighted with a red box. Above the table, there are several icons: a pencil, a green plus sign, a blue minus sign, a blue up arrow, and a red down arrow (highlighted with a red box).

Select a Folder in the tree-view and click the “Download Changed Documents” command button on the right hand pane. The **Contents** pane will list the Documents in the currently selected folder *which you have previously downloaded, and which have been replaced by a new version since your last download.*

You can download these documents individually (by clicking the Document Name).

Clicking the Download Documents command button displayed at the foot of this list will create a ZIP file containing all the listed documents which you can save to your local disk, or open in your default ZIP handling application.

4 DoxShare Personal

4.1 Introduction to DoxShare Personal

DoxShare Personal is an application which allows you to download and store documents locally on your computer in a secure, encrypted repository, providing you with access to these documents whilst not connected to the Internet.

DoxShare Personal:

- Provides you with access to your DoxShare Documents when an Internet connection is not available;
- Automatically synchronises with your DoxShare site when an Internet connection is available to ensure the correct Documents are stored locally;
- Only stores locally the Folders and Documents you have permissions to view;
- Can be configured to automatically check and update the Folders and Documents to a schedule set by you;
- Displays a status bar showing the last time it synchronised with your DoxShare site;
- Will automatically update to the latest version of the application as and when these become available.

The following sections provide further information on how to install, configure and use DoxShare Personal.

Please note that the images may refer to CDP Personal. For this please read DoxShare Personal.

4.2 Installation of DoxShare Personal

DoxShare Personal will run on a Windows XP Professional, a Windows Vista or a Windows 7 machine. *N.B. DoxShare Personal is not compatible with Active Directory Authenticated User Accounts.*

It requires the following:

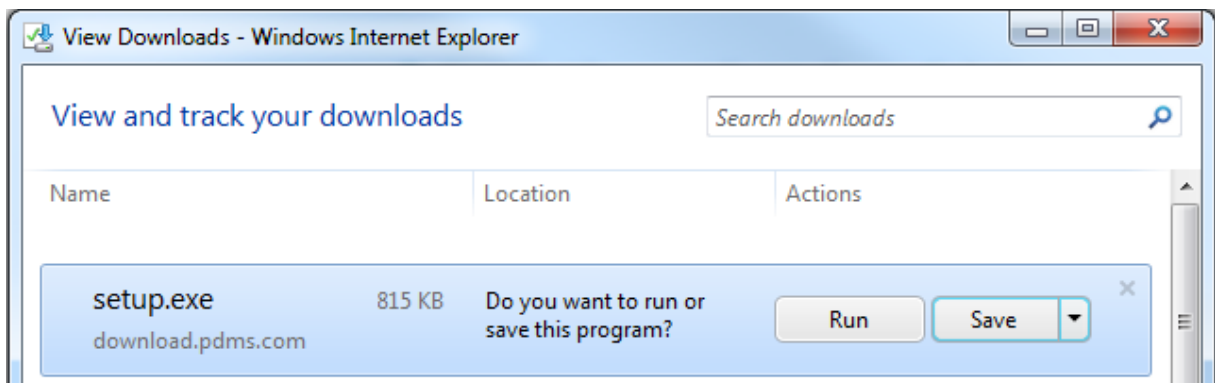
- Windows Installer 4.5
- Microsoft .NET Framework 4 Client Profile (x86 and x64)
- SQL Server Compact 4.0

which, if not already in place, will be installed by the Installation process:

To install DoxShare Personal, open your browser and navigate to the following URL:

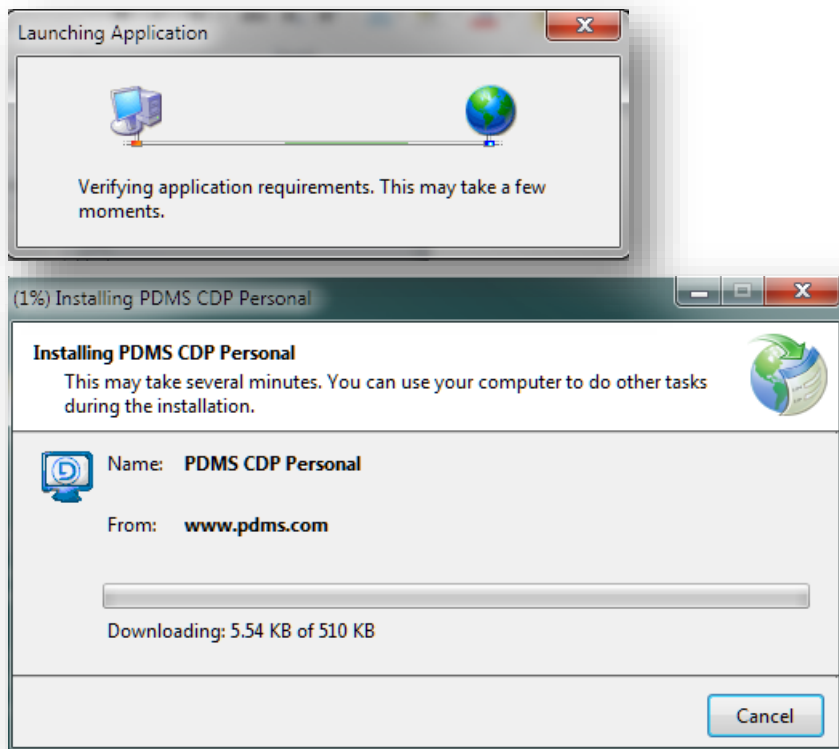
<http://download.pdms.com/doxsharepersonal/setup.exe>

The subsequent process will vary depending on your operating system version and security policies, but an example is now described. You may require the assistance of your network Administrator to complete the installation.

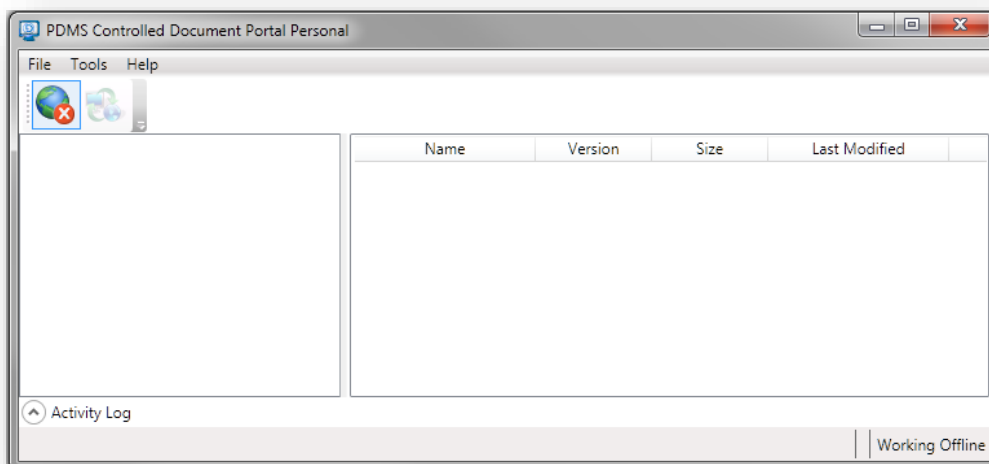


Choose Run in response to the above, or a similar, dialog.

The progress of your installation will be shown in dialogs *similar* to the ones below.



When complete you will see DoxShare Personal application open to show its main window.



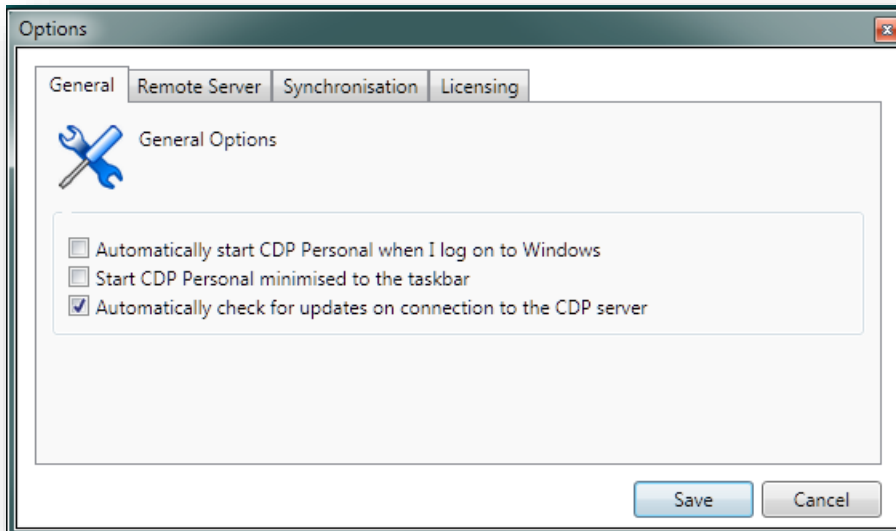
At this point, DoxShare Personal is installed on your computer, and can be accessed from the Start Menu at:

All Programs > PDMS > DoxShare > PDMS DoxShare Personal

However, in order to connect it to your DoxShare web-application, it requires configuring and licencing.

4.3 Configuration of DoxShare Personal

To configure DoxShare Personal, choose the “Tools” menu in DoxShare Personal application (as per the image above) and select “Options”. You will then see the dialog box as shown in the image below. (Please read CDP Personal as DoxShare Personal).



The following sections describe how to update each of the four tabs – General, Remote Server, Synchronisation and Licensing.

4.3.1 General DoxShare Personal Settings

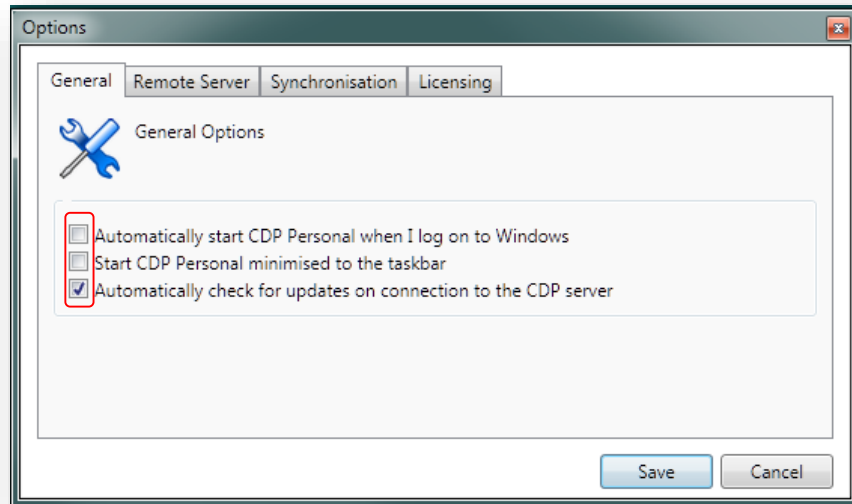
The “General” tab contains the following settings, detailed with their default settings:

- Automatically start DoxShare Personal when I log on to Windows – Unchecked
- Start DoxShare Personal minimised to the taskbar – Unchecked

- Automatically check for updates (to Documents) on connection to DoxShare server – Checked

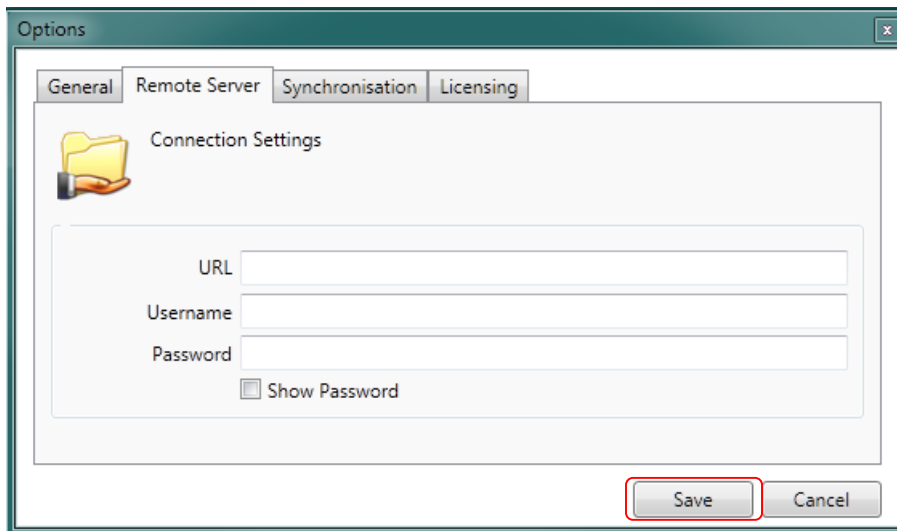
To change these settings according to your own preferences, check/uncheck the checkbox next to the appropriate option(s) and click “Save”.

These settings should be reviewed/adjusted after installation, but can be revisited and edited at any future time.



4.3.2 Remote Server Connection Settings for DoxShare Personal

The “Remote Server” tab is where DoxShare Personal needs to be configured with the information necessary to access the DoxShare web application:



The dialog box shown above should be updated as follows:

- **URL** – Enter the URL that DoxShare Personal will use to connect to DoxShare, that is the URL that you use to access your DoxShare with the extension /webdav/ added, for example:

<https://myDoxShare.DoxShare.pdms.com/webdav/>

- **Username** – Enter the user name you use to access the DoxShare website;

- **Password** – Enter the password you use to access the DoxShare website.

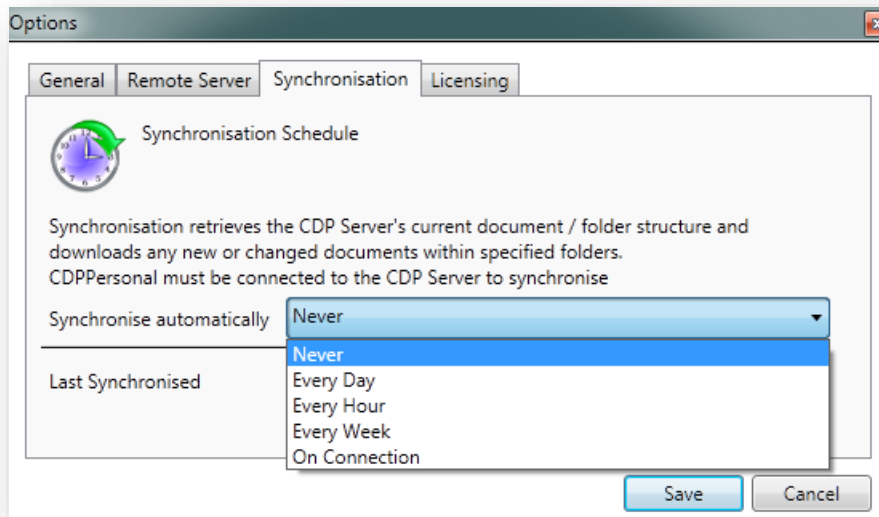
Click “Save” to save this configuration information.

4.3.3 DoxShare Personal Synchronisation Schedule

The “Synchronisation” tab controls how often DoxShare Personal will download updated Documents from your DoxShare web application.

The synchronisation frequency options available are:

- Never
- Every Day
- Every Hour
- Every Week
- On Connection



If left at the default option of “Never”, then synchronisation with your DoxShare web application you will have to be performed manually (see DoxShare **Personal Menu/Tools** section below).

Whichever option is chosen, synchronisation will only be performed whilst DoxShare Personal is running.

Notes:

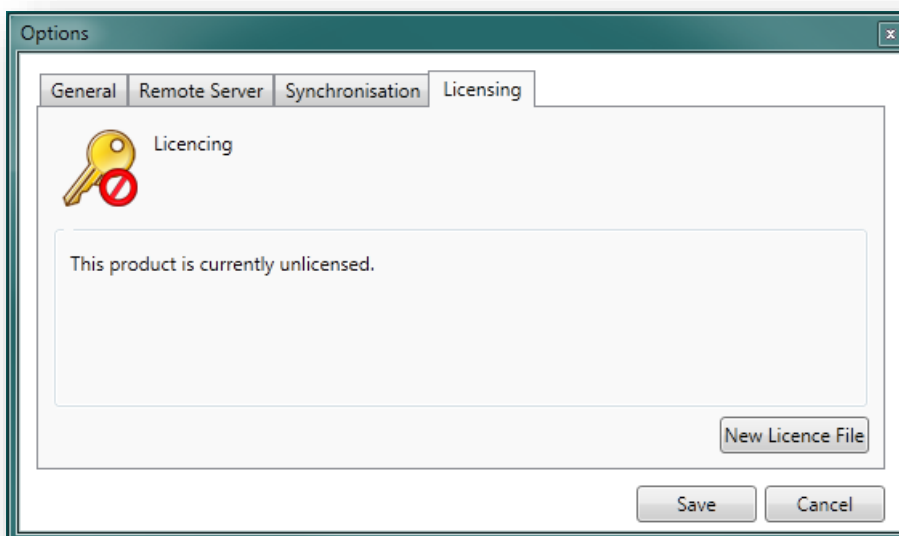
1. If no Documents have been updated to your DoxShare web application since DoxShare Personal last synchronised, then no data will be transferred.
2. Consideration should be given to your connectivity to your DoxShare web application when selecting the synchronise schedule.

4.3.4 DoxShare Personal License

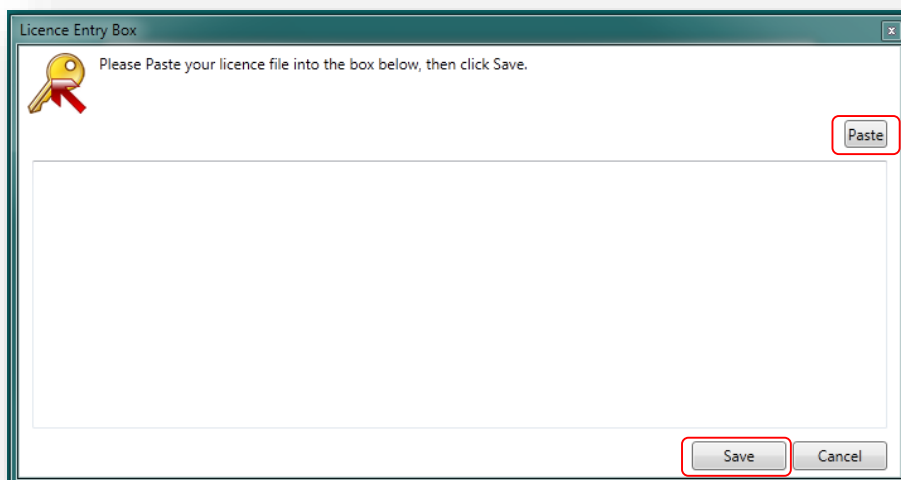
The “Licensing” tab is where you install the DoxShare Personal licence ‘key’. You will need to request a Licence, which is a long series of apparently random letters and numbers, from your DoxShare Administrator.

Once you have received a licence:

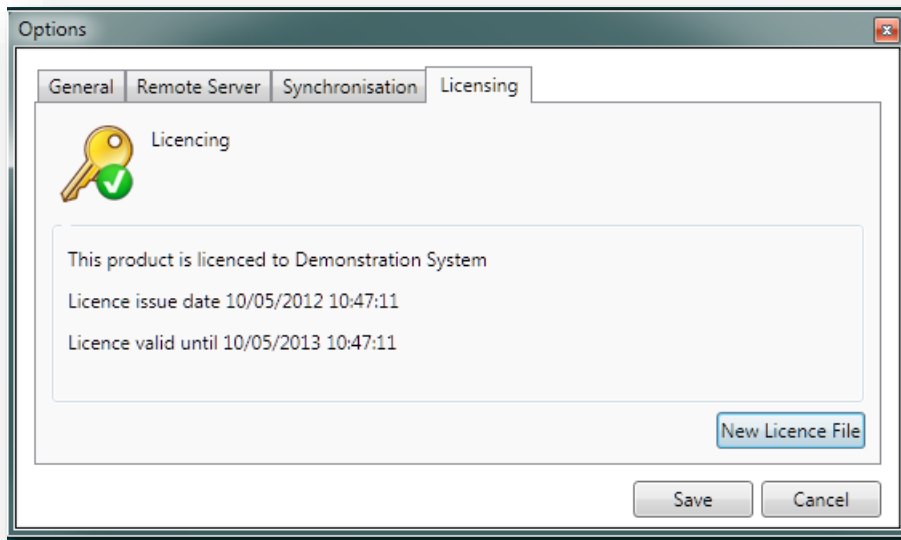
1. Copy the Licence provided to you by your DoxShare Administrator to your Windows Clipboard.
2. Click the “New Licence File” button.



3. Using the “Paste” button, paste the copied contents into the “Licence Entry Box” and click “Save”.



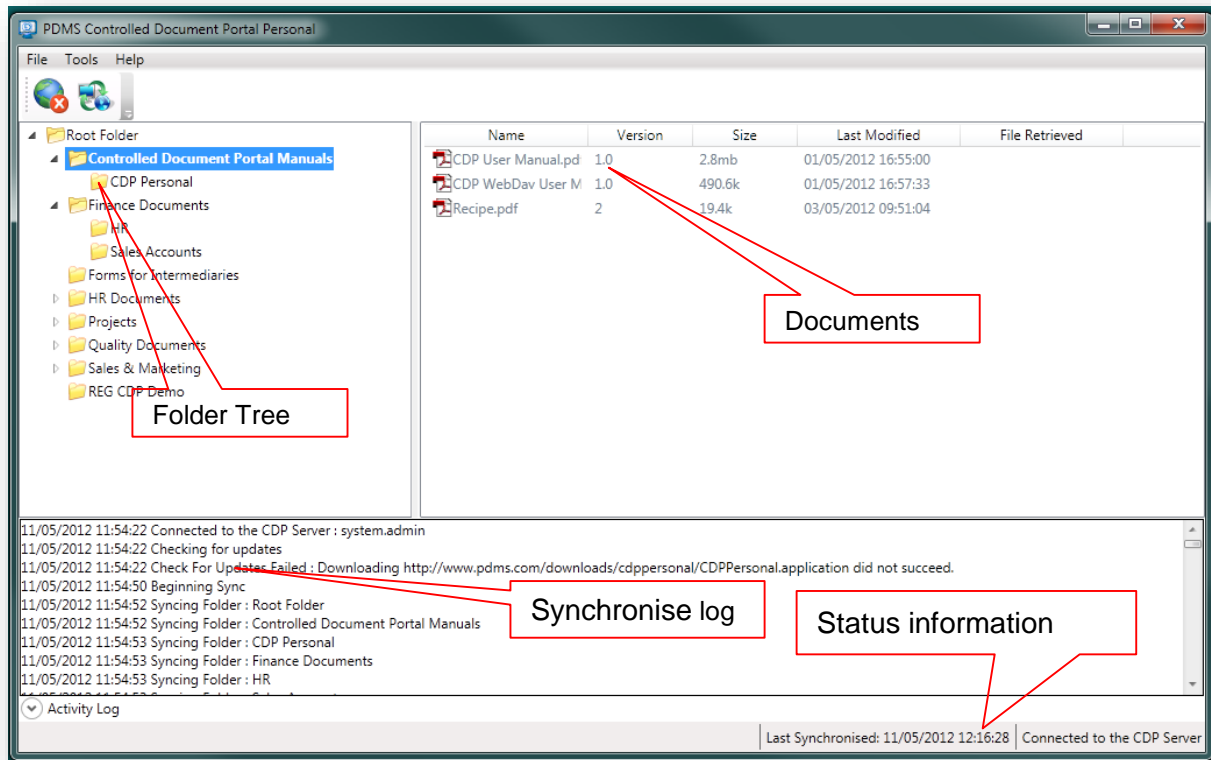
This completes the licencing of DoxShare Personal. The Licence details can be viewed at any time by selecting the Licensing tab.





Note: The DoxShare Personal Licence has an expiry date, which should be noted.

4.4 DoxShare Personal Main Window

The DoxShare Personal main window is laid out in a similar way to the DoxShare web application. On the left side you see the **Folder Tree** and on the right side of the window you see the **Documents** area.



At the top left of the window are two command buttons:

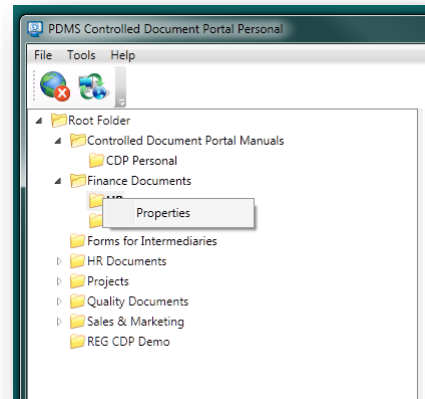
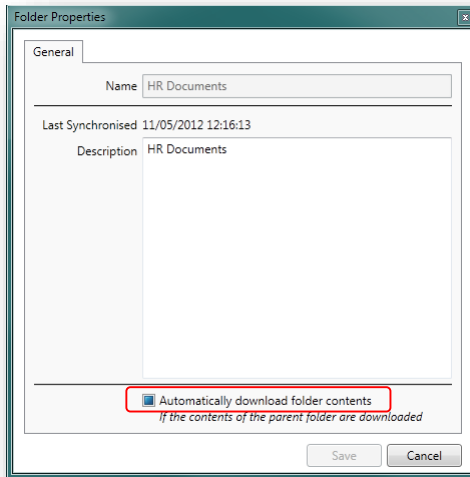
-  This connects and dis-connects DoxShare Personal with to/from your DoxShare web-application (see **File|Work Offline**, below).
-  When connected to your DoxShare web-application, this synchronises the Document information and Folder structure from the DoxShare web-application (see **Tools|Synchronise**, below). Note that this **does not** download the Documents themselves.

At the bottom of the window is an expandable “**Activity Log**” which can be used to check which documents have been synchronised. Click the “Up” arrow to expand the Activity Log window, and the “Down” arrow to minimise it.

The **Status Bar** at the very bottom right of the main window confirms the date and time of the last synchronisation with the central DoxShare site, and whether DoxShare Personal is currently “Connected to DoxShare Server” or “Working Offline”.

4.4.1 Configuring a Folder for Automatic Download

A Folder can be configured to automatically download the Documents it contains when DoxShare Personal is connected to your D DoxShare web application. To do this, right click on the Folder in the tree-view and choose **Properties**.

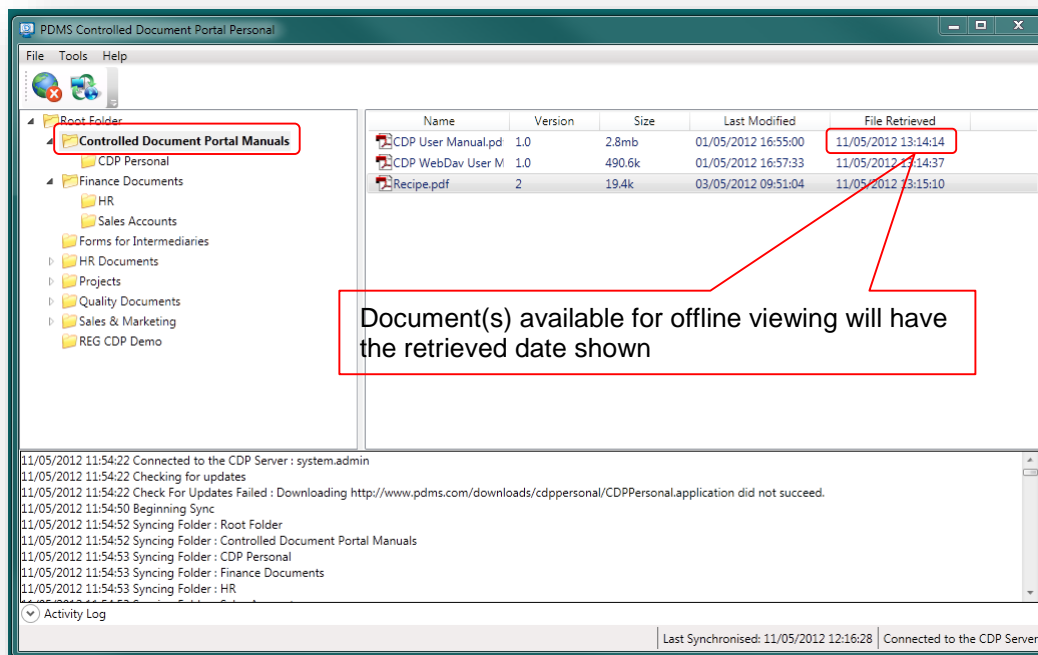


Then, in the Folder Properties dialog, check the “Automatically download folder contents” checkbox.

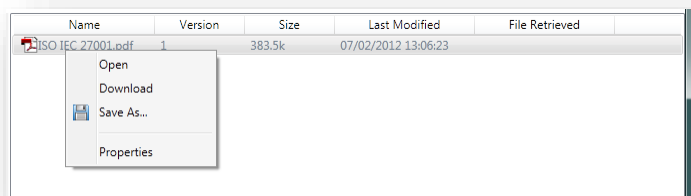
The contents of the Folder will then be automatically Downloaded to your DoxShare personal on synchronisation with your DoxShare web application, both when a manually and when a synchronisation is performed as per a Synchronisation Schedule set up by you (see **DoxShare Personal Synchronisation Schedule**, above).

4.4.2 Downloading and Viewing Documents

Documents that have been synchronised with your DoxShare web-application, but have not yet been downloaded, are displayed in the Documents section of DoxShare Personal Main Window in grey text; Documents which have been both synchronised and downloaded are displayed in black text. In addition, Documents which have been downloaded will be displayed with a “File Retrieved” date.

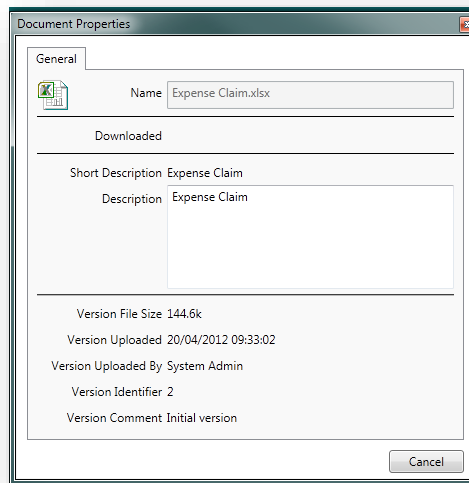


The behaviour of the functions that can be performed on Documents depends on whether or not DoxShare Personal is connected to your DoxShare web application. All are available by right clicking the Document.



- **Open:** Will download and open the selected document in the default application for the file type of the Document. If DoxShare Personal is Online, then prior to opening the Document, DoxShare Personal will check your DoxShare web application and download the Document as necessary.
- **Download:** This option is only available when DoxShare Personal is Online; it will download the Document to DoxShare Personal.
- **Save As:** Will open a Save As dialog to allow you to save the Document in your own file system. If DoxShare Personal is Online, then prior to saving the Document, DoxShare Personal will check your DoxShare web application and download the Document as necessary.

- **Properties:** Will open a dialog box detailing the properties of the document, as uploaded to the Document Details section of your DoxShare web application.

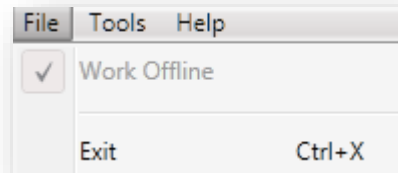


4.5 DoxShare Personal Menus

4.5.1 File

The File menu contains two options:

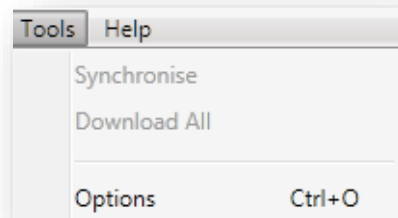
- **Work Offline:** This switch is used to control if the application is Online or Offline (i.e. connected or not connected to your DoxShare web application). When Offline, you can only see Folders that have been synchronised and access Documents that have been downloaded.
- **Exit:** This option will close DoxShare Personal.



4.5.2 Tools

The tools menu contains three options:

- **Synchronise:** Clicking this option will cause DoxShare Personal to synchronise to your DoxShare web application. Synchronisation will transfer the information about the files contained in the folders, but **will not** download the files themselves.
- **Download All:** Clicking this option will download all the Documents that you have permission to access in your DoxShare web application.
- **Options:** This is where you set your preferences and configure DoxShare Personal as described in the “Configuration” section above.



4.5.3 Help

The Help menu contains three options:

- **Check For Updates:** Clicking this option will cause DoxShare Personal to check for updates/upgrades to the software application itself.
- **Show EULA:** Clicking this option will display a window showing DoxShare Personal End-User Licence Agreement with PDMS.
- **About DoxShare Personal:** Clicking this option will display a window showing DoxShare Personal application version information and links to the agreements relating to use of DoxShare and DoxShare Personal.

