

DoxShare User Manual

PDMS

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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 <u>www.pdms.com/DoxShare/resources</u>

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.

D)MS		
ome	About Login		
cces	s your document fron	n anywhere in the World!	
e Contr	olled Document Portal (CDP) lets y	you access your documents from anywhere with an internet connection.	
ing the	CDP you can provide your staff, pa	artners or customers with the most up-to-date versions of key documents wherever they are in the world through a single, secure portal.	
atures t	o help you control and distribute al	Il your documents include: an easy to use file structure, search, version control, auditing, reporting, and security and permissions management.	
out The	PDMS CDP		
ublic Do	ocuments		
Doci	ument Type All	Go Go	
	Record(s) 1-7 of 7		
	A Name	🖡 Description	✓▲ File Size
1	<u>Brochure - Manx Grads -</u> flyer_grads	Brochure - Manx Grads - flyer_grads	2.9mb
73	Brochure - Public Sector Brochure - 2009	Brochure - Public Sector Brochure - 2009	1.2mb
2	CDP User Manual	Manual for standard users of the CDP	2.8mb
7	CDP WebDav User Manual	CDP user manual regarding webdav features only	490.6k
2	eGaminigleaflet	eGaminigleaflet	4mb
2	MARIS	MARIS	3.1mb
2	Recipe	asdasdad	19.4k
< < 1	> >		5 10 25 50

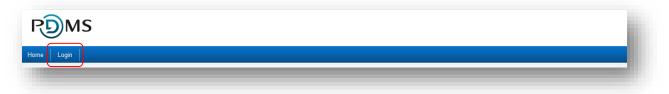
Notes:

- 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.

Username:	
Password:	- 1
Accept and Login	- 1
Forgotten password? Click here to recover it using your user name or email a	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 <u>Click here</u> link. This will open the Password Assistance – Account Details window.

Please enter either your	username or your email address.
User Name	
Email Address	
g problems recoveri	ng your password? Please contact your administrator at <u>admin@mycdp.cdp.pdms.com</u>

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

This will open the Password Assistance – Account Verification window.

Jser Name	John.Smit	h		
Email Address				
Please enter the followin	g characters from you	ur memorable word.		
Character 7	Α -	Character 15	A	
aving problems recoveri	ng your password? Pi	lease contact your adminis	trator at admin@mycdp.cd	n ndms 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.

Isername	John.Smith			
lew Password		*		
Confirm New Password		*		
ving problems recovering yo	our password? Please co	ontact your administrator at	admin@mycdp.cdp.pd Change Passv	

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.



og Off

.com

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.

sonal	Home D	ocument Portal	About	My CDP	Log
	User Details	Change Passwo	rd Chan	ge Memorable	Word
	Account Details	S			
otion	Individual	Title	Mr		
JUON	First Name	e	John		
-	Surname		Smith		
can	Email Add	ress	john.smit	h@mycdp.cdp.p	odms.co
e by					
nand			Edit		

MS

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

Memorable Word Memorable Word K Confirm Password		*
	Save	

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:

Document Portal About						
older jects Analysis and Design	Contents of Root Folder					
Project Management	etail Contents					
Support and Hosting UAT and Training	Search Criteria					
	Uploaded By System User Select					
	Uploaded Date On or Before					
	Uploaded Date On or Estrere Ves Facent Sub Folders? Ves Gearch Read Read(s) 1-10 of 10				[Column Selection
	Uploaded Date On or Enforce (** Folder Center	•• File Size	Version ++ Last Updated		
	Uploaded Date Include Sub Folder?	Project Management	36.1k	1 09/02/2012 10:19:04	Details	Column Selection
	Uploaded Date Include Sub Folder?	Project Management Post Project Review		1 09/02/2012 10:19:04		
	Uploaded Date Include Sub Folder?	Project Management Post Project Review Development and Testing	36.1k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35	Details	View
	Uploaded Date Include Sub Folder?	Project Management Post Project Review Development and	36.1k 799.3k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35 1 09/02/2012 10:18:11	Details Details	View View
	Uploaded Date Include Sub Folder?	Project Management Post Project Review Development and Testing	36.1k 799.3k 147k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35 1 09/02/2012 10:18:11 1 09/02/2012 10:23:13	Details Details Details	View View View
	Uploaded Date Include Sub Folders?	Project Management Post Project Review Development and Testing Support and Hosting Analysis and	36.1k 799.3k 147k 97.3k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35 1 09/02/2012 10:16:11 1 09/02/2012 10:23:13 1 09/02/2012 10:16:36	Details Details Details Details Details	View View View View
2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Uploaded Date Include Sub Folders?	Project Management Post Project Raview Development and Testing Support and Hooling Analysis and Project Management Analysis and Analysis and	36.1k 799.3k 147k 97.3k 148.5k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35 1 09/02/2012 10:10:11 1 09/02/2012 10:23:13 1 09/02/2012 10:16:36 1 09/02/2012 10:10:36 1 09/02/2012 10:19:20	Details Details Details Details Details Details	View View View View
2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Uploaded Date Include Sub Folders? Ves Record Ves Actions Artsing Log Template Actions Artsing Log Template C sharp coding standards C left Name Website Support and Hosting Contract Citert Name Website Support and Hosting Contract Design Brief (Umbraco) Issues and Lessons Learned Log Template Site Map Template (Excel)	Project Management Post Project Review Development and Testing Support and Hosting Pasign Playes and Design Markagement Analysis and Design Support and	36.1k 799.3k 147k 97.3k 148.5k 29.3k	1 09/02/2012 10:19:04 1 09/02/2012 10:21:35 1 09/02/2012 10:18:11 1 09/02/2012 10:23:13 1 09/02/2012 10:16:36 1 09/02/2012 10:16:36 1 09/02/2012 10:17:02 1 09/02/2012 10:17:42	Details Details Details Details Details Details	View View View View View
2 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Uploaded Date Include Sub Folders? Ves Centre Ce	Project Management Post Project Review Development and Support and Hosting Analysis and Design Project Analysis and Design Design	36.1k 799.3k 147k 97.3k 148.5k 29.3k 56.5k	1 09/02/2012 10.19.84 1 09/02/2012 10.21.35 1 09/02/2012 10.21.31 1 09/02/2012 10.21.31 1 09/02/2012 10.16.36 1 09/02/2012 10.12.32 1 09/02/2012 10.12.40 1 09/02/2012 10.17.42 1 09/02/2012 10.17.42 1 09/02/2012 10.12.30	Dataila Dataila Dataila Dataila Dataila Dataila Dataila	View View View View View View View

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).

lcon	F	unction	lcon	Function
🧪 or	Ø	Edit Folder		Export to CSV
📔 or	-	Add Sub-Folder	≌ or 🚺	Delete Folder
宜 or	P	Upload Document	🚽 or 属	Download Changed Documents
or or		View Document	📝or 📑	Edit Document Details
in a contract of the second se	2	Replace Document	🔎 or 👿	Delete Document
►		Expand	v	Collapse
<		Go to First	>	Go to Last
<		Previous Page	>	Next Page
1 •• Name		Selected Page Change Sort Order of Column Assending	2 ▼≜ Name	Next page of data Ex 2 Change Sort Order of Column Descending
\$		Save Preferences	5 10 25 50	Number of lines per page
+		Add Item Move Up	- V	Delete Item 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":

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 IsO Standards Overview Staff Training and Information 1 07/02/2012 12:08:15 Details View IsO Standards Overview Action of the standards Procedures 1 07/02/2012 12:58:28 Details View IsO IEC 27001 Standard Documents 1 07/02/2012 13:06:23 Details View IsO IEC 27001 Manx Legislation 1990 07/02/2012 13:06:23 Details View Iso IEC 27001 Manx Legislation 1990 07/02/2012 13:25:19 Details View Iso IEC 27001 Manx Legislation August 2011 07/02/2012 13:27:18 Details View Iso IEC 201 Storage UK Legislation August 2011 07/02/2012 13:27:18 Details View Iso IEC 201 Storage Job Descriptions 1 07/02/2012 14:18:48 Details View Proced Manager Job Descriptions 1 07/02/2012 14:		🖡 Name	✓▲ Folder	Version	👞 Last Updated		
Iso Standards Overview – Sales and Information I 01/02/01/21/2:03:36 Details View Iso Standards Overview Safe Training and Information 1 07/02/2012/12:08:15 Details View Iso Standards Overview Procedures Processes 1 07/02/2012/12:08:15 Details View Iso Since Zr001 Standard Documents Procedures Processes 1 07/02/2012/12:08:23 Details View Iso Since Zr001 Standard Documents 1 07/02/2012/13:06:23 Details View Iso Since Zr001 Marx 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 Image: Lead Developer Job Descriptions 1 07/02/2012/14:18:48 Details View Image: Project Manager Job Descriptions 1 07/02/2012/14:18:51 Details View Image: PDMS Application Form Application Application 1 07/02/2012/14:36:22 Details View	7	BS EN ISO 9001:2008		2008	07/02/2012 11:55:00	Details	View
Iso Standards Overview and Information I 07/02/2012 12:00:15 Details View Image: So Standards Overview 42.3 Controlled Document Content and Layout Procedures Processes 1 07/02/2012 12:58:28 Details View Image: So Standards Document Content and Layout Standard Documents 1 07/02/2012 13:06:23 Details View Image: So Standards Document Content and Layout Standard Documents 1 07/02/2012 13:06:23 Details View Image: So Standards Document Content and Layout Marx Legislation 1990 07/02/2012 13:25:19 Details View Image: So Standards Document Content and Layout Marx Legislation August 2011 07/02/2012 13:25:19 Details View Image: So Standards Document Content and Layout Job Descriptions 1 07/02/2012 13:27:18 Details View Image: So Standards Document Content and Layout Job Descriptions 1 07/02/2012 14:18:48 Details View Image: So Standards Document Content and Layout Job Descriptions 1 07/02/2012 14:18:51 Details View	W	ISO Standards Overview – Sales		1	07/02/2012 12:03:38	Details	View
Processes I UT/2/2/12/12:85:26 Details View ISO IEC 27001 Standard Documents 1 07/02/2012 12:85:26 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 Project Manager Job Descriptions 1 07/02/2012 14:18:48 Details View POSCH Project Manager Job Descriptions 1 07/02/2012 14:18:51 Details View POSCH Project Manager Job Descriptions 1 07/02/2012 14:36:22 Details View	P	ISO Standards Overview		1	07/02/2012 12:08:15	Details	View
No. IEC. 27001 Documents I 07/02/012 13:06:23 Details View ILCENSING OF WASTE DISPOSAL REGULATIONS 1990 Manx Legislation 1990 07/02/2012 13:25:19 Details View PPG2 - 01 Storage UK Legislation August 2011 07/02/2012 13:27:18 Details View Image: Lead Developer Job Descriptions 1 07/02/2012 14:18:48 Details View Image: Project Manager Job Descriptions 1 07/02/2012 14:18:51 Details View Image: PDMS Application Form Application 1 07/02/2012 14:36:22 Details View	W	4.2.3 Controlled Document Content and Layout		1	07/02/2012 12:58:28	Details	View
2 PPG2 - Oil Storage DKL egislation August 2011 07/02/2012 13:27:18 Details View Image: Image	7	ISO IEC 27001		1	07/02/2012 13:06:23	Details	View
Image: Weak of the second se	*	LICENSING OF WASTE DISPOSAL REGULATIONS 1990	Manx Legislation	1990	07/02/2012 13:25:19	Details	View
Project Manager Job Descriptions 1 07/02/2012 14:18:51 Details View PDMS Application Form Consent and 1 07/02/2012 14:36:22 Details View	1	PPG2 - Oil Storage	UK Legislation	August 2011	07/02/2012 13:27:18	Details	View
Application, Consent and Application, Consent and Difference Details View	W	Lead Developer	Job Descriptions	1	07/02/2012 14:18:48	Details	View
PDMS Application Form Consent and 1 07/02/2012 14:36:22 Details View	W	Project Manager	Job Descriptions	1	07/02/2012 14:18:51	Details	View
	W	PDMS Application Form	Consent and	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 "unchecking" 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 ^(a) 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 👻
Icon
Image: Name
- Version Format
🗹 - Filename
- Short Description
Long Description
Image: Version Comment
Folder
File Size
Version
Last Updated
- Last Updated By
Interview - 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 is controls, click on the command to expand the search pane and reveal the search criteria:

etail Contents		1
Search Criteria		
<u>></u>		
Ļ		
Search Criteria		
<u> </u>		
Name		
Description		
Document Content		
Uploaded By System User	Select 💌	
Uploaded Date	On or Before 💌	
Include Sub Folders?	Yes -	
	Reset Search	

To collapse the search pane, click on \square 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.

Document Portal Administration Log O se Documents	ff		System Admin 2
Root Folder Controlled Document Portal Finance Documents Forms for Intermediaries V HR Documents	Folder Details	for ISO 9001	/ 🖴 🖴 🛊
Munufacturing Quelity Occuments Quelity Occuments Dio Standards Dicisa/ Controls Standard Documents Sto Dis 27001 Dicisa/ Controls Sto Dis 27001 Diced/maxProcesses Control 40 Standard Document Content Staff Training and Information Gib Osciences	Name Description	ISO 9001 ISO Quality Standard	
L W ISO Standards Overview - Sales	Security Level Groups	Internal Staff & Clients Quality	

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

Document Portal Administration Log	Off				System Admin 🚨
e Documents					
Controlled Document Portal Controlled Documents Pranse Documents Manufacturing Usulty Documents Usulty Documents Docu	Contents of ISO 9001 Detail Contents Search Criteria Record(s) 14 of 4				Column Selection •
Edit Folder Content	I ≥ Name	▼▲ Folder Version			
2. Upload Document	4.2.3 Controlled Document Content and Layout	Procedures/Proc 1	07/02/2012 12:58:28	Details	View
- 📋 ISO14001 - 📋 Sales & Marketing	ISO Standards Overview	Staff Training and Information 1	07/02/2012 12:08:15	Details	View
	E ISO Standards Overview – Sales	Staff Training and Information 1	07/02/2012 12:03:38	Details	View
	BS EN ISO 9001:2008	Standard 2008	07/02/2012 11:55:00	Details	View

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.

Add sub folder	to : ISO 9001	
Detail Contents		
Name Description	*	*
Security Level Groups	Please Select Please Select Save Cancel	<u>ط</u>
-		

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 classificiation 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

							System Adm	
Document Portal Administration Log Documents	Off							
Root Folder Controlled Document Portal	₽C c	ontents of ISO Standards						
D Forms for Intermediaries	Detail	Contents				R 📔	≌ 🏦 🕹	
Quality Documents	► S	Search Criteria						
Delete Folder Upload Document		Image: Second(s) 1.8 of 8 Image: Column Selection +						
A Delete Folder	• < 1					Ē	Column Selection 👻	
Delete Folder Upload Document Staff Training and Information Staff Training and Information		• 12 €0 ▼^ Name	▼▲ Folder	Version	▼▲ Last Updated			
Contract Contrect Contract Contract Contract Contract Contract Contract Contrac	*	A Name PPG2 - Oil Storage	UK Legislation	August 2011	07/02/2012 13:27:18	Details	View	
Delate Folder Upload Document Standard Documents Standard Documents Standard Documents Standard Documents Oldool	2	A Name PPG2 - Oil Storage LICENSING OF WASTE DISPOSAL REGULATIONS 1990	UK Legislation Manx Legislation	August 2011 1990	07/02/2012 13:27:18 07/02/2012 13:25:19	Details Details	<u>View</u> <u>View</u>	
Delate Folder Upload Document Standard Documents Standard Documents Standard Documents Standard Documents Oldool	12 12 12	Abms PPG2 - OII Storage LICENSING OF WASTE DISPOSAL REGULATIONS 1990 ISO 14001 2004	UK Legislation Manx Legislation ISO14001	August 2011	07/02/2012 13:27:18	Details Details Details	View	
Delate Folder Upload Document Standard Documents Standard Documents Standard Documents Standard Documents Oldool	2	A Name PPG2 - Oil Storage LICENSING OF WASTE DISPOSAL REGULATIONS 1990	UK Legislation Manx Legislation	August 2011 1990	07/02/2012 13:27:18 07/02/2012 13:25:19	Details Details	<u>View</u> <u>View</u>	
Delate Folder Upload Document Standard Documents Standard Documents Standard Documents Standard Documents Oldool	12 12 12	Abms PPG2 - OII Storage LICENSING OF WASTE DISPOSAL REGULATIONS 1990 ISO 14001 2004	UK Legislation Manx Legislation ISO14001 Standard	August 2011 1990 2004-11-15 1	07/02/2012 13:27:18 07/02/2012 13:25:19 07/02/2012 13:19:50	Details Details Details	View View View	
Delate Folder Upload Document Standard Documents Standard Documents Standard Documents Standard Documents Oldool	12 12 12	Abms PPG2 - OII Storage LICENSING OF WASTE DISPOSAL REGULATIONS 1990 ISO 14001 2004 ISO IEC 27001	UK Legislation Manx Legislation ISO14001 Standard Documents	August 2011 1990 2004-11-15 1	07/02/2012 13:27:18 07/02/2012 13:25:19 07/02/2012 13:19:50 07/02/2012 13:06:23	Details Details Details Details	View View View View	
Constant of the second se			UK Legislation Marx Legislation ISO14001 Standard Documents Procedures/Proce Staff Training and	August 2011 1990 2004-11-15 1 1 1	07/02/2012 13:27:18 07/02/2012 13:25:19 07/02/2012 13:19:50 07/02/2012 13:06:23 07/02/2012 12:58:28	Details Details Details Details Details Details	View View View View View	

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

Detai	l Contents					≌ 🔒 🚽
•	Search Criteria					
<	Record(s) 1-8 of 8 • Name	▼▲ Folder	Version	🕶 Last Updated		Column Selection 👻
9	PPG2 - Oil Storage	UK Legislation	August 2011	07/02/2012 13:27:18	Details	View
9	LICENSING OF WASTE DISPOSAL REGULATIONS 1990	Manx Legislation	1990	07/02/2012 13:25:19	<u>Details</u>	View
6	ISO 14001 2004	ISO14001	2004-11-15	07/02/2012 13:19:50	Details	View
9	ISO IEC 27001	Standard Documents	1	07/02/2012 13:06:23	Details	View
v	4.2.3 Controlled Document Content and Layout	Procedures/Proce	1	07/02/2012 12:58:28	Details	View
ľ	ISO Standards Overview	Staff Training and Information	1	07/02/2012 12:08:15	Details	View
W	ISO Standards Overview – Sales	Staff Training and Information	1	07/02/2012 12:03:38	Details	View
X	BS EN ISO 9001:2008	Standard Documents	2008	07/02/2012 11:55:00	Details	View

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 us displayed; or
- 2. Select the "Delete Folder" command button that is displayed in the right hand pane.

Detai	Contents					📫 🔒
Þ	Search Criteria					
< <	1 ≥ ► Record(s) 1-8 of 8	▼ ▲ Folder	Version	▼▲ Last Updated		Column Selection 👻
7	PPG2 - Oil Storage		August 2011	07/02/2012 13:27:18	Details	View
7	LICENSING OF WASTE DISPOSAL REGULATIONS 1990	Manx Legislation	1990	07/02/2012 13:25:19	Details	View
1	ISO 14001 2004	ISO14001	2004-11-15	07/02/2012 13:19:50	Details	View
*	ISO IEC 27001	Standard Documents	1	07/02/2012 13:06:23	Details	View
IW	4.2.3 Controlled Document Content and Layout	Procedures/Proce	1	07/02/2012 12:58:28	Details	View
P	ISO Standards Overview	Staff Training and Information	1	07/02/2012 12:08:15	Details	View
W	ISO Standards Overview – Sales	Staff Training and Information	1	07/02/2012 12:03:38	Details	<u>View</u>
7	BS EN ISO 9001:2008	Standard Documents	2008	07/02/2012 11:55:00	Details	View

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 \approx 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 subfolders). The icon changing to a \propto indicates that the Folder can be dropped into the underlying Folder. Prior to moving the Folder, a confirmation dialogue will be displayed.

Document Portal Administration Lo	Off		System Admin
Documents			
toot Folder finance Decument Portal finance Decuments for thermediates f	Contents of ISO Information Contents C	▼+ Folder Version →- Last Updated	Column Selection •
Standard Documents		The page at https://demo.cdp.pdms.com says: Are you sure you wish to move this folder? OK Cancel	

When a folder is moved it will retain its existing Security Groups. Please note that because the security groups work in a hierarachical 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 Classisifcation 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

	Administ	ration About	Log Off						
cuments									
ot Folder CDP Promotional Mate Finance Documents	^{ial:} 🔳 (Contents of	ISO 9001						
HR Documents Projects Quality Documents	De	etail Contents				4			î :
ISO Standards - [] ISO 27001 - [] ISO 9001	•	Search Criteria							
- ISO Information									
Sales & Marketing Shipping	< <	< 1 > > Record	s) 1-4 of 4				8	Column	Selection
		▼▲ Name	▼▲ Filena	ime	 Version Comment 	⊸ Folder	▼▲ File Size	Version	
		4.2.3 Controlled Document Conten and Layout	4.2.3 Conti Content an	rolled Document Id Layout	First version	Procedures Processes	167.5k	1	<u>Details</u>
	e	ISO Standards Overview	ISO Stand	ards Overview	First Version	Staff Training and Information	2.6mb	1	<u>Details</u>
						Staff Training	52k	1	<u>Details</u>
	æ	ISO Standards Overview – Sales	ISO Stand Sales	ards Overview -	First Version	and Information	JZK		

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 will reveal the Search Criteria controls; clicking on the command will hide them.

The criteria on which a search will be performed are:

Name	
Description	
Document Content	
Document Format	PDF •
Jploaded By System User	Select
Uploaded Date	Between (Inclusive) 🔹 🗰 and
Include Sub Folders?	Yes -
Document Type	Check List
	Check List
	Reset Search

- **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.

ment Portal Administ	ration About L	.og Off					
ts							
e Documents	Contents of IS	SO 9001					
cuments s Do v Documents o Standards	etail Contents			Ø			
ISO 27001	Search Criteria						
SO Information							
ISO14001							
Marketing	1 > > Record(s) 1	-4 of 4			\$	Column	Selection
			✓▲ Version Comment	▼ ▲ Folder	✓ File		Selection
Marketing	A Name Acade Controlled Document Content and Layout	-4 of 4 •• Filename 4.2.3 Controlled Document Content and Layout	 ✓▲ Version Comment First version 	Folder Procedures Processes		Version	Selection
Marketing K	✓▲ Name 4.2.3 Controlled Document Content	Filename 4.2.3 Controlled Document	Comment	Folder Procedures	✓▲ File Size	Version	
Marketing	Name <u>4.2.3 Controlled Document Content and Layout ISO Standards </u>	Filename 4.2.3 Controlled Document Content and Layout	Comment First version	Folder Procedures Processes Staff Training and	✓▲ File Size 167.5k	Version 1 1	Details

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.

Document Portal Administration Log O	ff		System Admin
ocuments			
oot Folder Controlled Document Portal	= D D. t	for BS EN ISO 9001:2008	
Finance Documents	 Document Details 	TOF BS EN ISO 9001:2008	
Forms for Intermediaries			_
HR Documents	Details History Audit		 P
Manufacturing Quality Documents			
150 Standards	Name	BS EN ISO 9001:2008	
- 🛄 ISO 27001	Short Description	ISO 9001:2008	
- 150 9001			
Procedures/Processes 4.2.3 Controlled Document Content			
- I Staff Training and Information			
Standard Documents	Long Description	ISO 9001:2008 Quality Management System -	
- 🔁 BS EN ISO 900112008		Requirements	
F [] ISO14001 Sales & Marketing			
Sales & manketing			
	Original Filename	ISO 9001 2008	
	Version Comment		
	Version Comment	November 2008	
	Version Identifier	2008	
	Document Version Format	PDF	
	Folder	Standard Documents	
	Uploaded On	07/02/2012 11:55:00	
	Uploaded By System User	System Admin	
	Document Type	Information 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);
 - o 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.

DMS								System Admin 2	
e Document Portal Adr	ninistr	ration About L	_og Off						
e Documents									
Root Folder		0	00004						
GDP Promotional Materia: Finance Documents HR Documents	+(Contents of IS	50 9001						
Projects	De	etail Contents			A	/		1 🛃	
Guanty Documents ISO Standards ISO 27001		Sooroh Critoric							
- ISO 9001	Search Criteria								
- 🚺 ISO14001 Sales & Marketing	 < <	< 1 > > Record(s) 1	1-4 of 4			8	Column	Selection 🗸	
- 间 Shipping				✓▲ Version	VA	✓▲ File			
		Name 4.2.3 Controlled	▼▲ Filename	Comment	Folder	Size	Version		
	W	Anne A.2.3 Controlled Document Content and Layout	4.2.3 Controlled Document Content and Layout	Comment First version	Folder Procedures Processes			<u>Details</u>	
		4.2.3 Controlled Document Content and Layout ISO Standards	4.2.3 Controlled Document Content and Layout	First version	Procedures	167.5k	1		
***		4.2.3 Controlled Document Content and Layout	4.2.3 Controlled Document		Procedures Processes Staff		1	Details Details	
		4.2.3 Controlled Document Content and Layout ISO Standards Overview	4.2.3 Controlled Document Content and Layout ISO Standards Overview	First version	Procedures Processes Staff Training and Information Staff Training	167.5k 2.6mb	1	Details	
		4.2.3 Controlled Document Content and Layout ISO Standards Overview	4.2.3 Controlled Document Content and Layout ISO Standards Overview	First version	Procedures Processes Staff Training and Information Staff	167.5k	1		

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.

PD MS				System Admin 🚢
Home Document Portal A Browse Documents	dministration	About	Log Off	
Root Folder Controlled Document Portal Difference Documents Difference Documents Difference Documents Difference Documents			ument	
Projects Quality Documents	Detail Select Fil	Contents		Please ensure that your document is no larger than 4MB and has been virus checked.
- i ISO Information - i ISO 14001 - i ISO14001 - KEG CDP Demo - i Sales & Marketing	Name Short De	scription		*
	Long Des	scription		
	Version (Comment		
	Version Documer	nt Type		* Please Select Save Cancel
_				

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.

₽ Edit	Docume	ent De	tails for ISO 14001 2004			- 1
Details	History	Audit				6
-				-	-	-

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	Docum	ent ISO 14001 2004		
Details Hi	istory A	ıdit		
		Please ensure that your document is no larger than 4 checked.	MB and has b	een virus
Select File				Browse
* Name		ISO 14001 2004	*	
Short Descript	tion	ISO Environment	*	
Long Descripti	ion	Environmental management systems - Requirements with guidance for use		
Version Comn	nent			
Previous Versi Version	ion	2004-11-15	*	
Document Typ	be	Information Document 💌 \star		

J 44004 2004 -

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.

₽ Dele	te Docu	ment IS	O 14001 2004		- 1
Details	History	Audit			
		ed with the de	ocument: 'ISO 14001 2004'? etion, or 'Cancel' to abandon. Confirm Cancel		

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.

e Document Portal Ad	ministration	About Log Off				
Root Folder CDP Promotional Materials Finance Documents Finance Documents Finance Tocuments Finance Cocuments Finance Co	Detail	Contents	d Documents		N 🔛	🖴 î 💽
- 📋 ISO 27001 - 🚺 ISO 9001	~	Name	▼▲ Folder	✓▲ File Size	✓▲ Version	✓▲ Last Updated
🔺 间 Procedures Proc		<u>3 Controlled Document</u> itent and Layout	Procedures Processes	167.5k	1	17/09/2012 14:16:17
	Con					17/09/2012
		14001 2004	ISO14001	286.6k	2004-11-15	11:48:16

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.

🛃 View Downloads - Windows In	nternet Exp	lorer			×
View and track your dow	wnloads	S	Search downloads		٥
Name		Location	Actions		^
setup.exe download.pdms.com	815 KB	Do you want to run or save this program?	Run	Save 🔻	Ξ

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.

		ition	
	ifying ap ments.	pplication requirements. This may take a few	
1%) Installi	ing PDN	AS CDP Personal	
This r	may take	CDP Personal e several minutes. You can use your computer to do other tasks stallation.	?
	Name:	PDMS CDP Personal	
	From:	www.pdms.com	
6	Downloa	ading: 5.54 KB of 510 KB	-

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

PDMS Controlled Document Portal Personal File Tools Help	_	-	_		×
	Name	Version	Size	Last Modified	
Activity Log				Working 0	

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).

ions				
General	Remote Server	Synchronisation	Licensing	
×	General Option	5		
📃 Star	rt CDP Personal m	DP Personal when ninimised to the tag for updates on cor	skbar	

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

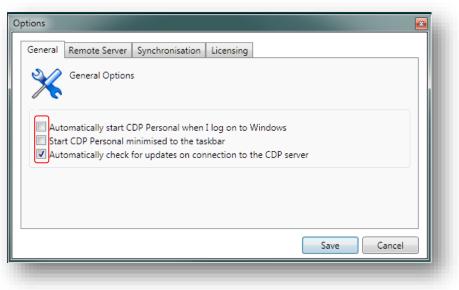
The "General" tab contains the following settings, detailed with their default settings:

- 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:

Options		×
General Remote Serv	er Synchronisation Licensing	
Connection	Settings	
URL		
Username		
Password		
[Show Password	
	Save Cancel	,

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

eneral Remote Server	Synchronisation Licensing
Synchronisatic	on Schedule
downloads any new or ch	s the CDP Server's current document / folder structure and hanged documents within specified folders. nnected to the CDP Server to synchronise
Synchronise automaticall	y Never 🔻
	Never Every Day

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 whist 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.

tions General Remote Server Synchronisation Licensing	X
Licencing	
This product is currently unlicensed.	
	New Licence File

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

Licence En	try Box
2	Please Paste your licence file into the box below, then click Save. Paste
	Save Cancel



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

General Remote Server Synchronisation Licensing	
O Licencing	
This product is licenced to Demonstration System	
Licence issue date 10/05/2012 10:47:11	
Licence valid until 10/05/2013 10:47:11	
	New Licence File
	New Licence File
	Save Cancel

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.

PDMS Controlled Document Portal Personal					
File Tools Help					
🧞 🕵 g					
⊿ 📂 Root Folder	Name	Version	Size	Last Modified	File Retrieved
Controlled Document Portal Manuals	CDP User Manual.pd		2.8mb	01/05/2012 16:55:00	
CDP Personal	CDP WebDav User M	1.0	490.6k	01/05/2012 16:57:33	
Finance Documents	Recipe.pdf	2	19.4k	03/05/2012 09:51:04	
Sales Accounts			\sim		
Forms for Intermediaries			\sim		
HR Documents					- I
Projects				Documents	
Quality Documents			L		
Sales & Marketing					
Folder Tree					
11/05/2012 11:54:22 Connected to the CDP Server : system.admi 11/05/2012 11:54:22 Checking for updates	n				A
11/05/2012 11:54:22 Check For Up dates 11/05/2012 11:54:22 Check For Up dates Failed : Do wnloading ht	p://www.pdms.com/downl	oads/cdppersor	al/CDPPersonal	application did not succeed.	
11/05/2012 11:54:50 Beginning Sync					
11/05/2012 11:54:52 Syncing Folder : Root Folder 11/05/2012 11:54:52 Syncing Folder : Controlled Document Porta	Manuals Syn	chronise	e log	Status infor	mation
11/05/2012 11:54:53 Syncing Folder : CDP Personal					matori
11/05/2012 11:54:53 Syncing Folder : Finance Documents 11/05/2012 11:54:53 Syncing Folder : HR					
					· · · ·
V Activity Log			L.		V
			La	st Synchronised: 11/05/2012 1	2:16:28 Connected to the CDP Server

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



This onnects and dis-connects DoxShare Personal with to/from your DoxShare web-application (see **File|Work Offline**, below).



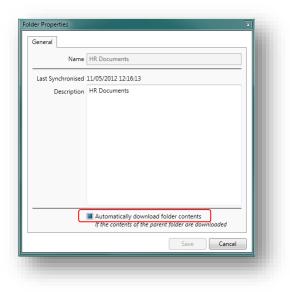
When connected to your DoxShare web-application, this synchronises the Document information and Folder structure from the DoxShare web-application (see **Tools|Synchronise**, below). Note that this **does not** download the Documents themselves.

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**.



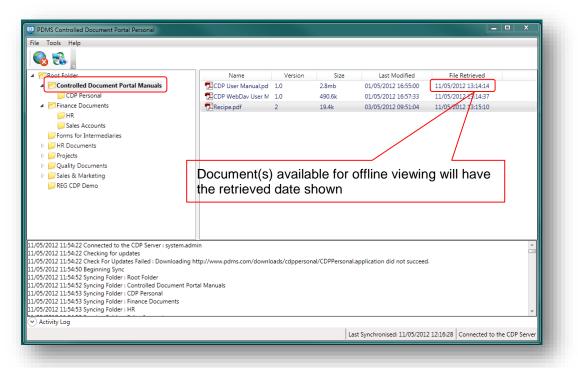
le Tools Help	_
🗞 🕄 j	
📂 Root Folder	
Controlled Document Portal Manuals	
📁 CDP Personal	
Finance Documents	
Properties	
📁 Forms for Intermediaries	
IR Documents	
Projects	
Quality Documents	
Sales & Marketing	
📁 REG CDP Demo	

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.

Nam	e	Version	Size	Last Modified	File Retrieved	
ISO IEC 27	001.pdf	1	383.5k	07/02/2012 13:06:23		
	Open					
	Download					
	Save As					
	Properties					
_						

- **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.

General		
Name	Expense Claim.xlsx	
Downloaded		
Short Description	Expense Claim	
Description	Expense Claim	
Version File Size	144.6k	
Version Uploaded	20/04/2012 09:33:02	
Version Uploaded By	System Admin	
Version Identifier	2	
Version Comment	Initial version	
		Cancel

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.

File	Tools Help	.
\checkmark	Work Offline	- 1
	Exit	Ctrl+X
	EXIL	Curry

• **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.

Tools	Help		
	Synchronise Download All		
C	Options	Ctrl+O	

- **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.

