

## Common Tasks using the WebUI

The WebUI (accessed at <https://jeffshare.jefferson.edu>) provides access to a web-based document management application which features a complete set of file management and collaboration tools, including version control, workflow, and document sharing.

### **Bookmark Folder:**

To create a bookmark of a frequently visited or newly shared folder.

Navigate to the folder of interest.

Click on the 'New Bookmark' button.



A bookmark for that folder will now appear in your JeffShare Bookmark list, visible by clicking on the 'Bookmarks and Saved Searches' button.



### **Help:**

To receive help information in general or about the subject on which you are currently working.

While viewing your directory listing, click on "Help" found at the right hand side of the top menu bar to open the 'Help' window.



While viewing other screens, you may access context sensitive help by clicking on the 'Help' icon on the right-hand side of the screen.



### **Sharing (including Email, Links, and Tickets):**

To share a file or folder with someone in or outside the JeffShare system, The document will be intellitached through a link or ticket. Permissions will be granted to that file or folder.

Select a file or folder to share. Click on the 'Share' action icon from the toolbar.



Type in the users names or email addresses in the add users box or use the search box to find users. You may also type in email addresses of those not on the JeffShare system. A ticket will be automatically created for those user in the next step. As you type in users names, a yellow drop-down box appears. You may click in this box to select the correct user or previously entered email address.

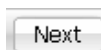
#### Add Users

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

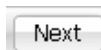
Separate users by commas or semicolons.

Or you may search:

When all users are entered in the 'Add Users' box, click on the 'Next' button.



Select which type of access the user(s) and/or ticket should have. If a ticket is created and its name, lifetime and/or password need to be changed, click on the 'Ticket Options' drop down arrow. When the access types are defined for all users and/or tickets created, click on the 'Next' button.



An email message is generated. Add any additional text to the body of the email that you wish and click on the 'Finish' button.



### **Subscription:**

To receive automatic email notifications of file usage (read, write or comments.)

In the directory listing, right-click on the file or folder's name. Select "Subscribe" from the shortcut menu.

Select of which events you want to be notified.

Select whether you want immediate notification or a daily summary.

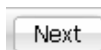
Click on the 'Ok' button.

### **Workflow:**

To manage the review and/or editing of a document among several users. There is no way to delete workflows, so it is good practice to run saved workflows when applicable.

Right-click on the file or folder. Click on 'Start Workflow' from the shortcut menu. If you have any saved workflow templates that you want to reuse, click on the drop-down arrow next to "Choose Workflow Template" and select the one you wish.

Click on the 'Next' button.



You may put your own instructions in the 'Participant Instructions:' box. Next choose to have participants act on the workflow in order, one after the other (serial) or simultaneously, in any order they want (parallel), by clicking the drop-down arrow and making a selection.

If the following users approve/review in

Click on the 'Add Participant' button.

Enter the user's name in the 'Begins with' box and click on the 'OK' button. Select the correct user and click on the 'Next' button. Repeat this procedure for all Workflow participants. You may move participants up and down in the process order by clicking on the arrows in the 'Re-Order' column. You may now set options for the user. Select the user type by clicking on the 'Type' drop-down arrow.

Select whether it is mandatory or optional for the user to check-off on the document in order for the workflow to continue by clicking on the 'Mandatory' drop-down arrow.

Enter in the length of time, in days, that the user has to check-off on the document in the 'Task Length' box. After it is entered, the due date is automatically calculated. Alternately, select the date the user's action is due and the length of time is automatically calculated. You may enter the date, or click on the calendar button and select the date from the pop-up calendar. When all of your users are in place and their options set to your satisfaction, click on the 'Next' button.

If you would like to save this workflow as a template, click in the check box next to "Save this workflow and its parameters as a template". Enter a name in the 'Template Name:' field.

If you want to be automatically notified as each step progresses, select "Me (Workflow Initiator)" from the 'Send email notification of workflow progress to:' drop-down list. Even if "Nobody" is selected, you will be notified of any workflow stop-pages.

Click on the 'Finish' button.

Emails will be sent out automatically to participants and the workflow will appear in their 'Tasks' tab.

### **Versioning:**

To view or save earlier versions of a document.

Right-click on the file. Point to "Manage" on the short-cut menu. Click on "Versioning" on the sub-menu.

To open, double-click on the version you want to open.

To copy, select the version you want and click on the 'Copy' button. Select a location for the copy to go and click on the 'OK' button.



## Common Tasks using the Drive

The Drive provides seamless integration with Windows desktop applications allowing them to access document management and collaboration tools in addition to offline capabilities.

### Always Available Offline:

To allow a file to be always available on the JeffShare drive letter, even when disconnected from the network.

In Windows Explorer, right click on the file. Click on 'Always Available Offline' from the shortcut menu.

### Create Intellitach (Email):

To send a document via email. The document will be intellitached through a link or ticket.

In Windows Explorer, right click on the file. Click on 'Create Intellitach...' from the shortcut menu. In the dialog box that opens, click to select to send either a 'Link' or 'Ticket'.

If sending a link, click on the 'Link Options' button. You may choose use the default permissions on the file or to change the permissions.

If sending a Ticket, click on the 'Ticket Options' button. You may choose to grant 'Read and Write' or 'Read Only' permissions. You may choose the 'Lifetime' to be 'Limited to' a certain time period, or choose the 'Lifetime' to be 'Unlimited'. In both cases you have the choice of making the options the default settings. Click on 'Ok' to set options and then click on 'Ok' to start up an email message with the file Intellitached.

### Lock File:

To set a file as read-only to prevent unwanted changes from other users.

In Windows Explorer, right click on the file. Click on 'Lock file...' from the shortcut menu. In the dialog box that opens, you may select how long you want to have the file locked. Enter a number in the number box. Click on the drop-down arrow and select the time period (hours, days, or weeks.) Click on the 'Ok' button when finished.

### Sharing (Setting Permissions):

To share a file or folder with someone in the JeffShare system you first need to give a user permissions to that file or folder.

In Windows Explorer, right click on the file. Click on 'Sharing' from the shortcut menu. The 'Sharing Options' dialog box opens. Click on the 'Add' button. The 'Search and add users' dialog box opens. In the 'Search for' box, type in at least the first name of the person for whom you wish to add permissions. Click on the 'Search' button. Select the name from the list that appears in the 'Users found' box on the right-hand side and click on the 'Add selected users' button.

In the 'Sharing Options' dialog box, with the users name highlighted, select which permissions to be assigned to that user by clicking in the associated check box.

If additional users are to be added, click on the 'Apply' button. Click on the 'Add' button and repeat the above procedure.

When finished, click on the 'Ok' button in the 'Sharing Options' dialog box.

### Versioning:

To view or save earlier versions of a document.

In Windows Explorer, right click on the file. Point to 'Versioning' on the shortcut menu. Click on 'List Version History'. Select the version you want to save and click on the 'Save As' button. Choose the location the file is to go, type in a name for the file and click on the 'Save' button.

### Viewing Drive Status:

To quickly see if a file or folder is locked or available offline.

In order to view JeffShare information concerning your files and folders in Windows Explorer, you must be in 'Details' view.

Click on 'View' in the menu bar and select 'Details'. The JeffShare detail then needs to be added to the column headers. Click on 'View' in the menu bar and select 'Choose Details...'. In the 'Choose Details' dialog box, scroll down to near the bottom of the list. Click in the check box next 'Xythos Drive Status' and click on the 'Ok' button.

### Enhanced Shortcut (right-click) Menu for Files on a JeffShare Drive

#### Open

Edit  
New  
Print

Scan for Viruses...  
Open With ▶

Sharing...  
Lock File...  
Create Intellitach...  
Always Available Offline  
Copy URL to Clipboard  
Versioning ▶

Subscriptions  
Comments  
File Access Log  
Manage

Send To ▶

Cut  
Copy

Create Shortcut  
Delete  
Rename

Properties

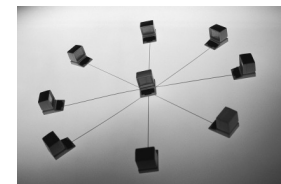


## An introduction to the JeffShare file management, collaboration and storage system

JeffShare represents the next generation of file management systems. It allows the user to securely store, manage and share files with others, both inside and outside the Jefferson community. Users may easily and securely access their files on the JeffShare system while traveling or from home.

With JeffShare, file sharing can be made easily and securely via JeffMail. Since ticket permission groups and web links are used, the full file is not attached to an email message. Therefore, the 30 Mb file size limit does not apply and file sizes will not count against a user's mail storage quota.

Collaboration is streamlined with JeffShare. Workflows may be employed so that collaborators are automatically notified of their part in the process. Subscriptions provide detailed information about when and by whom files are accessed. All previous versions of a document are automatically saved for review or reuse.



The user side of JeffShare consists of two main parts, the Web User Interface (WebUI) and the Drive, that work together to form a collaborative environment for the secure storage and sharing of information.

For further instructional materials and training schedules, visit the JeffShare File Services Resource Center Organization on Pulse.

For setup and training options, contact Mark Komp at extension 3-8903 or via email at [mark.komp@jefferson.edu](mailto:mark.komp@jefferson.edu).

