





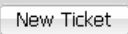



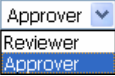




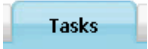
# JeffShare

## WebUI Quick Reference Guide

Task	Procedure
<p><b>Bookmark Folder</b></p> <p><i>To place a bookmark of a frequently visited folder in the bookmarks list.</i></p>	<p>Navigate to the folder of interest.</p> <p>Click on the 'New Bookmark' button.</p> <p style="text-align: center;"></p> <p>A bookmark for that folder will now appear in your JeffShare Bookmark list, visible by clicking on the 'Bookmarks and Saved Searches' button.</p> <p style="text-align: center;"></p>
<p><b>Help</b></p> <p><i>To receive help information in general or about the subject on which you are currently working.</i></p>	<p>While viewing your directory listing, click on "Help" found at the right hand side of the top menu bar to open the 'Help' window.</p> <p style="text-align: center;"></p> <p>While viewing other screens, you may access context sensitive help by clicking on the 'Help' icon on the right-hand side of the screen.</p> <p style="text-align: center;"></p>
<p><b>Email</b></p> <p><i>To send a document via email. The document will be intelligently attached through a link or ticket.</i></p>	<p>In the directory listing, click on the file's check box. Click on the email button.</p> <p style="text-align: center;"></p> <p>You may choose to send a link or a ticket.</p> <p>Links are best for people on the JeffShare system. You should set permissions for the recipient first (see procedure for 'Sharing'.)</p> <p>Tickets are best for people outside of the JeffShare system (see procedure for 'Tickets') although they may be employed for people on JeffShare if additional password protection and/or time limits are to be employed.</p>
<p><b>Sharing</b></p> <p><i>(Links, Tickets, Email)</i></p>	<p>Select a file or folder to share. Click on the 'Share' action icon from the toolbar.</p> <p style="text-align: center;"></p>

Task	Procedure
<p><b>Sharing - cont'd</b></p> <p><i>To share a file or folder with someone. A wizard will step you through selecting users and granting access for those both on and outside the JeffShare system.</i></p>	<p>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.</p> <p><b>Add Users</b>  <small>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.</small></p> <p style="text-align: center;"><input type="text"/></p> <p><small>Separate users by commas or semicolons.</small></p> <p style="text-align: center;">Or you may search: <input type="text"/> <input type="button" value="Find"/></p> <p>When all users are entered in the 'Add Users' box, click on the 'Next' button.</p> <p style="text-align: center;"><input type="button" value="Next"/></p> <p>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.</p> <p>An email message is generated. Add any additional text to the body of the email that you wish and click on the 'Finish' button.</p> <p style="text-align: center;"><input type="button" value="Finish"/></p>
<p><b>Subscription</b></p> <p><i>To receive automatic email notifications of file usage (read, write or comments.)</i></p>	<p>In the directory listing, right-click on the file or folder's name. Select "Subscribe" from the short-cut menu.</p> <p>Select of which events you want to be notified. Select whether you want immediate notification or a daily summary.</p> <p>Click on the 'Ok' button.</p> <p style="text-align: center;"><input type="button" value="OK"/></p>

Task	Procedure
<p><b>Ticket</b></p> <p><i>To share a file or folder with someone on or outside the JeffShare system. A time limit and/or password may be employed. (see also Sharing)</i></p>	<p>In the directory listing, right-click on the file or folder's name. Point to "Manage" in the shortcut menu. Select "Tickets" from the submenu.</p> <p>Click on the 'New Ticket' button on the right-hand side of the screen.</p>  <p>In the 'New Ticket...' dialog box, select the required permissions, lifetime and, if desired, set a password for the ticket.</p> <p>Click on the 'Ok' button. You may now send this ticket via email by selecting the ticket and clicking on the 'Email' button.</p>
<p><b>Workflow</b></p> <p><i>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.</i></p>	<p>Right-click on the file or folder. Click on 'Start Workflow' from the shortcut menu.</p> <p>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.</p>  <p>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.</p> <p>If the following users approve/review in </p> <p>Click on the 'Add Participant' button.</p>  <p>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.</p> 

Task	Procedure
<p><b>Workflow – cont'd</b></p>	<p>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.</p>  <p>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.</p> <p>When all of your users are in place and their options set to your satisfaction, click on the 'Next' button.</p> <p>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 stoppages. Click on the 'Finish' button.</p>  <p>Emails will be sent out automatically to participants and the workflow will appear in their 'Tasks' tab.</p> 
<p><b>Versioning</b></p> <p><i>To view or save earlier versions of a document.</i></p>	<p>Right-click on the file. Point to "Manage" on the short-cut menu. Click on "Versioning" on the sub-menu.</p> <p>To open, double-click on the version you want to open.</p> <p>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.</p>