



# Doc's File Server

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## User's Guide

For

**Department of Facility Services**

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# Server Login & Authentication Requirements

## Two ways to get to the Doc's File Server

1. In your web browser, visit website <http://ppims.mcmaster.ca> (refer to figure 1)
  - o On the left, click on Construction
  - o Then click on Document File Server link
  - o Enter your network username/password

The screenshot shows the McMaster University website. At the top left is the McMaster University logo with the tagline 'Inspiring Innovation and Discovery'. To the right are links for 'MUGSI Faculty & Staff Directory', 'Quick Links', and a search bar. Below this is a horizontal navigation menu with items: McMaster, Academics, Alumni, Discover McMaster, Future Students, Library, Research, and Student. On the left side, there is a 'Facility Services' menu with sub-items: About Us, Online Work Request, Alerts and Shutdowns, Construction (highlighted), Contractor Prequalification, Document File Server (highlighted), Health and Safety, and Management Information. Below this is a 'Mailing Address' section. The main content area features a 'Campus Construction' banner with a photo of construction workers. Below the banner is text about campus construction and a link to 'here'. To the right is a news item about an award. Two red arrows point from the text 'Click here First' to the 'Construction' menu item and 'Click here Second' to the 'Document File Server' link.

Figure 1

OR

2. In your web browsers address bar type in <https://docs.services.mcmaster.ca>
  - o Enter your username/password

# Server Login & Authentication Requirements

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## Login Credentials

- In an attempt to simplify authentication, Doc's file server uses your network password to verify your access
- Use your network username and password issued by Facility Services to login into the Doc's file server, this is the same username and password you would use to login into your office computer on a daily basis
- Your network password expires on a periodic basis, enter the updated password in Doc's file server also.
- 3 failed login attempts will lock your network username/password, give the system 15 minutes to unlock your account and you may retry again. If you do not remember your password, please contact Linda Jaskiewicz at ext 23058
- Always logout and close the web browser when done. This is a good habit to develop for your safety

<b>Important!</b>
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- Please do not hand out your network username and password under any circumstances to anyone
- If you think your account is compromised, change your password asap from your office computer and or contact Linda or Elliott
- When accessing the Doc's file server from a public computer such as airport, internet café, friends laptop etc please always logout and close your web browser. Do not leave any McMaster related files on a public computer !!!

# File/Folder Upload


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## Uploading a File or Folder

There are two modes of upload, **Basic** and **Advanced**. Basic upload allows you to browse one file at a time, until you have compiled a list of files to upload. Advanced upload allows you to drag-and-drop files or folders onto the Advanced upload screen. The upload mode can be easily switched at any time by clicking either the "Basic Upload" or "Advanced Upload" links on the Upload screen. Whichever mode you choose will be displayed the next time you upload files.

**Important:** Always check the size of the file or folder before you proceed to upload it to the server (in Windows Explorer, right-click the folder or file and select "properties" to view file size).

## Basic Upload

1. Navigate to the **Xythos** folder to which you wish to upload files.
2. Click the **Upload**  button as shown on Figure 2.
3. If in advanced mode, click on the **Basic Upload** link.
4. **Browse** to the file you wish to upload.
5. If you wish to upload more files, click **Add Files** and **Browse** to the file. Repeat this step for as many files as you wish to upload.
6. Click **Start Upload**.

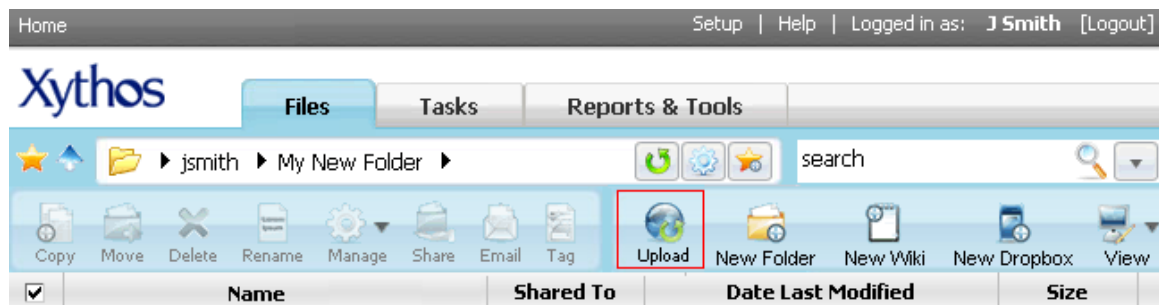


Figure 2

# File/Folder Upload

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## Basic Upload (cont'd)

**Xythos**

📁 ▶ jsmith ▶

**Upload File in:** /jsmith

For faster uploads, including the ability to upload folders and their contents, try our [Advanced Upload](#). Note that Advanced Upload requires the [Java 1.5 or higher](#) plugin available from Sun Microsystems.

Name	
<input type="text"/>	<input type="button" value="Browse..."/>
<input type="button" value="X"/>	


Overwrite file if it already exists.

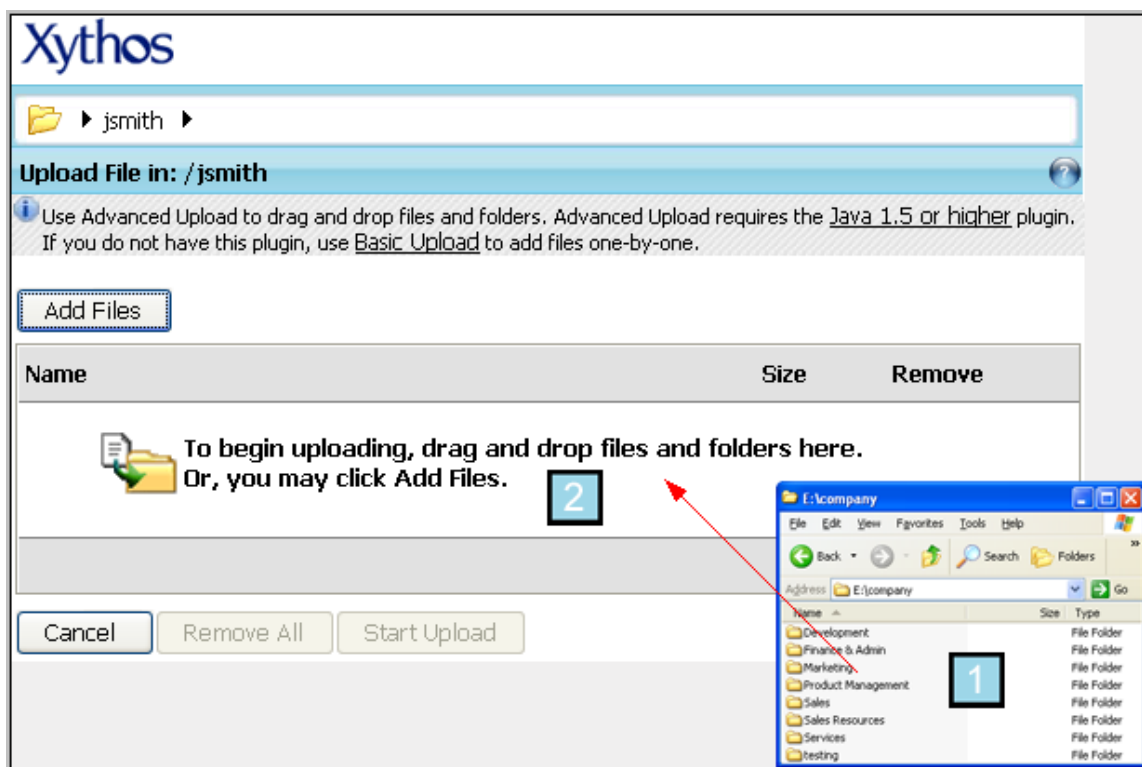
Figure 3

# File/Folder Upload

**Important:** Always check the size of the file or folder before you proceed to upload it to the server.

## Advanced Upload

1. Navigate to the folder to which you wish to upload files.
2. Click the **Upload**  button.
3. If in basic mode, click on the **Advanced Upload** link.
4. You may either drag or drop files and folders onto the drag-n-drop area or you may click **Add Files** and select files from your local machine.
5. Click **Start Upload**.
6. Should the upload stop or receive an error, click **Done** to exit the upload page.



*\*Note: Advanced Upload mode requires version 1.5 or higher of the Java plug-in available from [www.java.com](http://www.java.com). If you have the Java plug-in installed but it is not version 1.5 or higher, you will experience problems when attempting to use the Advanced Mode. If you do not wish to download and install the Java plug-in, use Basic Upload.*

# File/Folder Download

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**Remember:** The server can only download **one** item at any given time. You can download one file or ZIP (compress) multiple files into a single zip file and then download that file to your computer.

## Download a File:



### Save to Desktop

1. Navigate to the file you would like to save to your desktop.
2. **Right-click** on the file and select the **Save to Desktop** option.
3. Then click on SAVE button.

## Download Multiple files as a Zipped file:



### Save to Zip File

1. Navigate to the file(s) or folder(s) you would like to save to a Zip File.
2. **Right-click** on the file or folder and select the **Save to Zip File** option
3. Then click on Save button

# Bookmarks (Favorites)



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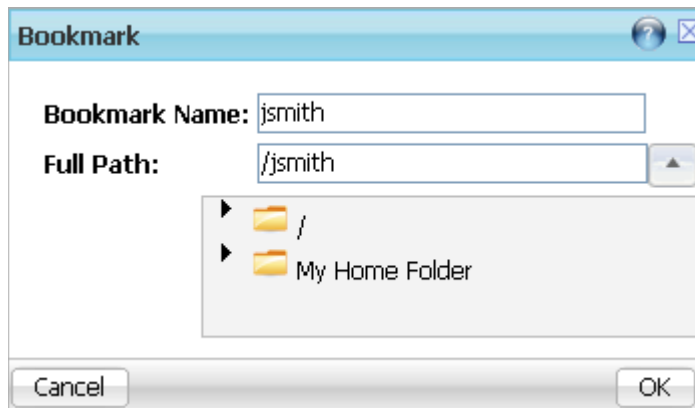
## Bookmarks

Bookmarks are shortcuts to folders and files within your Doc's server account. Using Bookmarks, you can conveniently create shortcuts to your most frequently accessed folders and files. You can also create shortcuts to other users' folders and files you have been allowed to access.

You may navigate to your bookmarks at any time by clicking on the **Bookmarks** button. In order to bookmark a file or folder, you must have **Read** access to that file or folder. Once you bookmark a file or folder, it will be available each time you login to your account and click on the **Bookmarks** button.

## Creating Bookmarks

1. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Create a Bookmark**  button.  
**- OR -**  
 On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Bookmark** option.
2. Provide a name for the Bookmark.
3. Provide the Full Path of the file or folder.  
*\*Note: This will be provided for you if you have selected the file or folder first.*  
 Optionally use the **Expand**  button to browse to the Full Path of the file or folder.
4. Click **OK**.





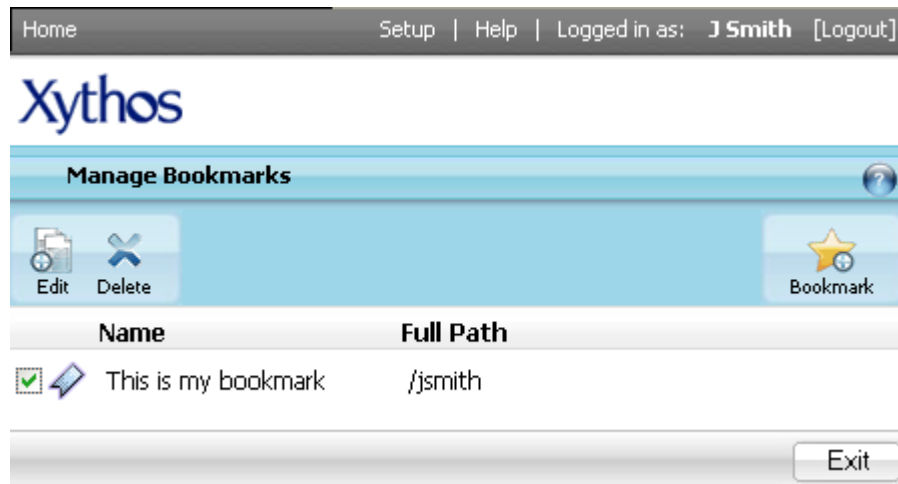
The screenshot shows a dialog box titled "Bookmark". It has a title bar with a close button. The dialog contains the following elements:

- Bookmark Name:** A text input field containing the text "jsmith".
- Full Path:** A text input field containing the text "/jsmith". To the right of this field is a small upward-pointing arrow button.
- Folder Tree:** A tree view showing a folder structure. The root folder is "/", and it contains a subfolder named "My Home Folder".
- Buttons:** At the bottom of the dialog are two buttons: "Cancel" on the left and "OK" on the right.

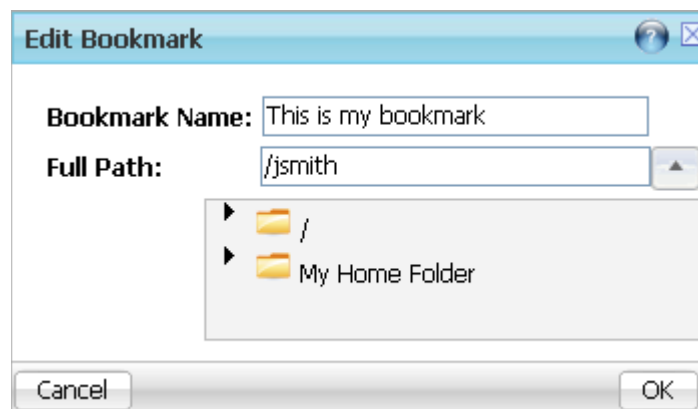
# Bookmarks (Favorites)

## Edit a bookmark

1. On the **Document Manager** screen, click the **Bookmarks and Searches**  icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to modify, and then click the  **Edit** button.



3. Modify the **Bookmark Name** and/or the **Full Path**



4. Click **OK**.

# Sharing a folder

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## Sharing a folder with a co-worker/External user




### Share Wizard

The **Sharing Wizard** guides you through sharing and notifying users. You may follow each step of this wizard, skip through to the desired step or end the wizard at any time.

The screenshot shows the Xythos Share Wizard interface. At the top, the Xythos logo is displayed. Below it, a breadcrumb path shows a folder icon, followed by 'jsmith' and 'This is a Folder'. A progress bar below the breadcrumb has three steps: 'Choose Users', 'Verify Permissions', and 'Send Email'. The 'Choose Users' step is currently active, indicated by a filled circle. Below the progress bar, the title 'Choose Users' is shown in a blue header bar with a help icon. An information icon and text state: 'This wizard steps you through setting Permissions to share to and, optionally, Email folders and files with users and groups.' The main content area is titled 'Choose Users' and contains the following text: '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.' To the right of this text is a large empty rectangular input field. Below the input field, the text reads: 'Separate users by commas or semicolons.' At the bottom center, there is a button labeled 'Search for Users'. At the very bottom of the window, there are two buttons: 'Cancel' on the left and 'Next' on the right.

# Sharing a folder

1. Within the **Document Manager**, put a checkmark in the box associated to the file or folder you would like to share.
2. Click the **Share**  button or right-click on the file or folder and select the **Share** option.
3. You are now in the **Sharing Wizard**.
4. You will be brought to the **Choose Users** screen.
5. Either begin typing in the user information in the box provided, or use the find utility.
6. Click the **Next** button.
7. Select your preferred sharing options. You may select the following options: Viewer, Contributor, or Full Access.
8. If you are currently setting sharing permissions on a folder, rather than a file, you will need to determine whether this access should apply to the current folder only, or this folder and all sub-folders by clicking on the appropriate radio button.
9. *Optional: Click **Finish** to skip the Email portion and exit the Wizard.*
10. Click **Next**.
11. You will be brought to the **Email** screen.
12. Create an email to notify users of the new share.
13. *Optional: Click **Back** to return to the previous step.*
14. Click the **Finish** button to exit the Sharing Wizard.

Xythos

📁 ▶ jsmith ▶ This is a Folder ▶

Choose Users   Verify Permissions   Send Email

**Verify Permissions** ?

? Defined the type of access other users will have.

Name	Type	Viewer (Read-Only)	Contributor (Read, Write, (Delete)	Full Access (Read, Write, (Delete, Administer)	Other...
Mary Snow (msnow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Henry Jenkins (hjenkins)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
admin group	Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Tony Crow (tcrow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Apply the changed permissions to this folder as well as its sub-folders and files.  
 Apply the changed permissions to this folder only.

Cancel   Back   Next   Finish

# Sharing a folder

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## Permissions

By default, every item is created with 3 sets of permissions:

- **Owner** - You are the owner of the items within your own account.
- **Users with Accounts** - Any users, in your Organization or outside of your Organization, that have a Doc's server account; Users must be logged in to their Doc's server account in order to gain access to the files or folders.
- **Public** - Any user accessing the service without an account or those users with accounts who have not logged in. Use this option to make your files and folders public to the outside world.

Within the Document Manager, there is a column labeled **Shared To**. This column identifies the following:

- **"None"** This file or folder is not shared to any other user.
- **"Some"** This file or folder is shared with another user, but not all users.
- **"Everyone"** This file or folder is shared with either the **Public** or shared with all users with an account.

Doc's server enables you to control access to your files in four different ways, represented by the four columns of permissions: Read, Write, Delete, and Administer.

## Read Permission

Read permission allows the user or **Group** of users to view the file or folder only. If a user is granted **Read** access on a folder, they are not automatically granted **Read** access to all of the folder's contents. The user will only have access to view the folders, sub-folders and files to which you have implicitly granted them access.

## Write Permission

Write permission allows the user or **Group** of users to write to the file or folder only. Write access includes the following: viewing, editing, renaming both the contents and options of the file or folder. If a user is granted **Write** access on a folder, they are not automatically granted **Write** access to all of the folder's contents. The user will only have access to write to the folders, sub-folders and files to which you have explicitly granted them access.

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# Sharing a folder

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## Delete Permission

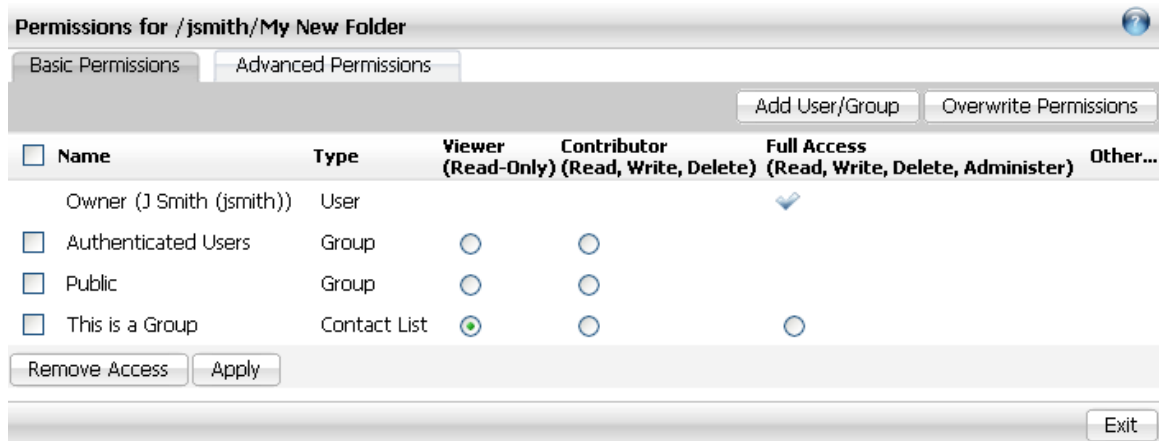
Delete permission allows the user or **Group** of users to move the file or folder to the trash. If a user is granted **Delete** access on a folder, they are not automatically granted **Delete** access to all of the folder's contents. The user will only have access to delete the folders, sub-folders and files to which you have explicitly granted them access.

## Administer Permission

Administer permission allows the user or **Group** of users full access to a file or folder's **Manage/Summary** screen and the permission to make modifications to all "Manage" items. If a user is granted **Administer** access on a folder, they are not automatically granted **Administer** access to all of the folder's contents. The user will only have access to administer the folders, sub-folders and files to which you have explicitly granted them access.

# Sharing a folder

## Basic Permissions



1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Viewer**, **Contributor** or **Full Access** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

## Advanced Permissions

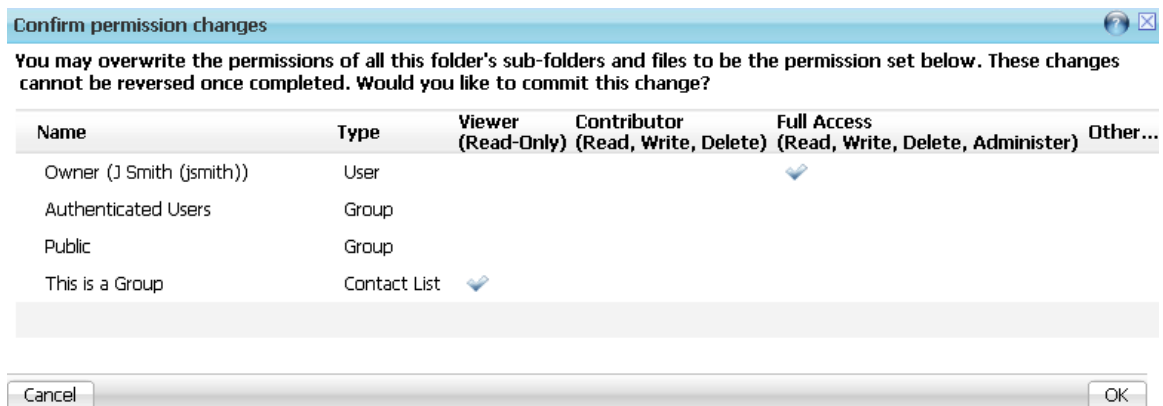
Read	Write	Delete	Administer	Inherit Read	Inherit Write	Inherit Delete	Inherit Administer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Advanced Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Read**, **Write**, **Delete**, **Administer**, **Inherit Read**, **Inherit Write**, **Inherit Delete** or **Inherit Administer** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

# Sharing a folder

## Overwrite Existing Permissions

When modifying folder Permissions, by default, you are adding permissions to the existing permission set. In order to overwrite the existing permission set, you must click the **Overwrite Permissions** button. When the **Overwrite Permissions** button is used, then all previous settings will be erased for the current folder, all of the folder's sub-folders and files. These changes **cannot be reversed** once completed. This change applies to **all files and sub-folders located within the current folder, the current permissions of the files and sub-folders will be changed to match the current folder.**



1. On the **Document Manager** screen, **Right-click** the selected folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab or the **Advanced Permissions** tab.
3. Set the folder and inherit permissions.
4. Click the **Overwrite Permissions**  button.
5. Click the **Apply** button to confirm changes, or click **Cancel** to discard changes

# Tickets

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## What is a Ticket?

- Doc's File server provides an easy to use and simple way of sharing a file or a folder with someone who does NOT have login access to the Doc's server. Tickets are created for a file/folder and sent to an external party via email.

## Why use a Ticket?

- It is virtually impossible to create a full login User account for every single contractor, engineering firm and other agency that the University interacts with on a yearly basis. Tickets provide a simple and easy way to share a single file or folder and its contents with an external user and set an expiry and password for the shared resource. Additionally, finite permissions can be set for read-only, read-write and full access to shared resource.

## Features of a Ticket

- When creating a Ticket to share with an external user, the expiry date, password and finite permissions can be set on the shared file or folder and its contents. When sharing a resource, the system requires the permissions to be set but expiry and password is optional. For the purposes of Facility Services, it is strongly recommended to set the expiry and password on every single ticket, and then communicate the password via a separate email or over the phone to the shared party.

**PLEASE DO NOT INCLUDE THE PASSWORD IN THE SAME EMAIL AS THE TICKET !!** This defeats the purpose of setting a password.

# Tickets

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## Create a ticket

1. On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Manage -> Tickets** option.  
**- OR -**  
 On the **Manage** screen, select the **Tickets** link.
2. Click the **New Ticket** button.
3. A new window will appear with default ticket values. You may modify the following:
  - a. Name
  - b. Permissions
  - c. Lifetime (**strongly recommended**)
  - d. Password (**strongly recommended, use a strong password with numbers, letters and special characters, upper and lowercase characters and a minimum length of 6 characters**)

When you are satisfied with the values, click **OK** to create the ticket.
4. The ticket is now listed in your **Tickets** screen. You may copy and paste the URL (web address) of the ticket into your preferred email client, or simply place a checkmark in the box(es) corresponding to the ticket(s) and click the **Email** button.
5. You may edit any of your tickets by returning to the ticket screen.

**New Ticket for: /jsmith/This is a File.jpg**
⊞

**Name:**

**Define Permissions:**  Viewer (Read-Only)  Contributor (Read, Write, Delete)

**Lifetime:**  Limited to     
 Unlimited

**Password Enable this Ticket**

**Ticket Password:** Not assigned

**Ticket Password:**  (Optional)

**Confirm Password:**

# Tickets

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## View all of your existing Tickets system wide

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Tickets** tab.

## Edit an existing ticket

Note that if you are viewing the tickets of a shared resource, some tickets may be owned by users other than you. If such a ticket is listed, you will not be able to edit or delete that ticket and therefore, those two options will not be available for the respective ticket.

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Edit** button.
3. Type in a new **Password**, confirm the password, and then click the **OK** button.
4. Click the **Exit** button in order to exit the **Ticket** screen.

# Tagging

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## What is a Tag?

Doc's File server allows you to create searchable keywords for files, which are called **Tags**. **Tags** are used for files and cannot be used for folders, however, you may **Tag** all files in the folder. In order to **Tag** a file you must have **Read** and **Write** permission for that file. If, however, you would like to search for a **Tag**, you need only have **Read** permission to view them. When creating **Tags**, there is not any type of character limitation, so the **Tag** may be as long or as short as you would like; there is also no limit to the number of **Tags** a file may have.

Within the **Document Manager**, you may set your **Document Manager Columns** to show the **Tags** associated to the files by clicking on the View icon on the very right.

## Add a Tag on a file

1. Navigate to the file you would like to **Tag**.
2. **Right-Click** on the file and select **Tag** from the menu.
3. Type in the **Tag** you would like associated to this file, and then click the **Add** button.
4. You may add as many **Tags** as you would like by using the **Add** button.
5. Click the **OK** button once all **Tags** have been added.

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*\*Note: Words separated with a space will be identified as separate tags. You may enter several tags for the file at once by separating words with spaces. If you click the **OK** button prior to clicking the **Add** button, no **Tags** will be added.*

## Add a Tag for multiple files

1. Navigate to the files you would like to **Tag**.
2. Place a check mark in the boxes associated to the files.
3. **Right-Click** on the file and select **Tag** from the menu.
4. Type in the **Tag** you would like associated to the files, and then click the **Add** button.
5. You may add as many **Tags** as you would like by using the **Add** button.
6. Click the **OK** button once all **Tags** have been added.




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*\*Note: Words separated with a space will be identified as separate tags. You may enter several tags for the file at once by separating words with spaces. If you click the **OK** button prior to clicking the **Add** button, no **Tags** will be added.*


# Tagging

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## Search by Tag

1. Click the **Expand**  button to the right of the **Search**  icon in order to expand the Search options.
2. Click the **Expand**  button to the right of **Add More Search Criteria**.
3. Select **Tags** from the **Select Property** drop-down box.
4. Click the **Add** button.
5. Type the name of the **Tag** you are looking for in the **Tags** field.
6. Click the **Search** button.

## Delete a Tag on a file

1. Navigate to, or search for, the file you would like to remove the **Tag** from.
2. **Right-Click** on the file and select **Tag** from the menu.
3. Within the **Tag** screen you will see all **Tags** associated to the file.
4. Click the delete  icon for the associated **Tag**.
5. Click the **OK** button once you have finished modifying the **Tags** associated to the file.

## Delete a Tag for multiple files

1. Navigate to, or search for, the files you would like to remove the **Tag** from.
2. Place a check mark in the boxes associated to the files.
3. **Right-Click** on the file and select **Tag** from the menu.
4. Within the **Tag** screen you will see all **Tags** associated to the files.
5. Click the delete  icon for the associated **Tag**.
6. Click the **OK** button once you have finished modifying the **Tags** associated to the files


# Subscriptions

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## What is a Subscription?

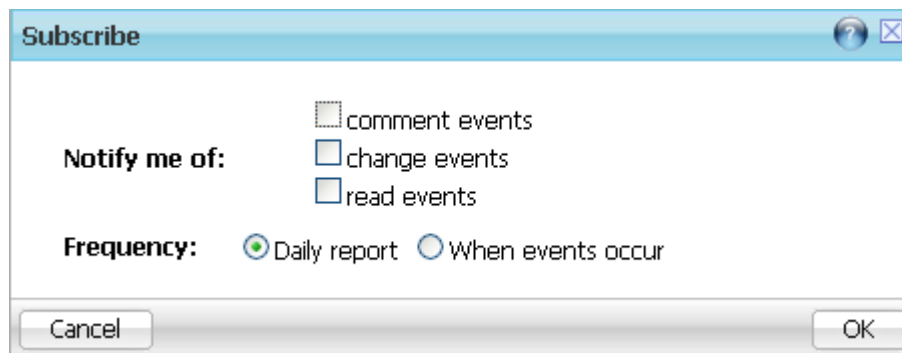
Subscriptions automatically notify you when a file or folder has been viewed, changed, or commented. Subscription notifications are sent via e-mail either when the viewing, changing, or commenting occurs or at a certain time of day. Such notifications are known as subscription reports. The type of report (view, change, or comment) and frequency of the report is determined when the subscription is created.

## Creating a Subscription:

1. On the **Document Manager** screen, **Right-Click** the selected file or folder.
2. Click the **Subscribe** option.  
**- OR -**  
 On the **Document Manager** screen, place a checkmark in the box associated to the file or folder, and then click the **Subscribe**  button.
3. Place checkmarks in the boxes associated to the notification events of your choice.
4. Choose the **Frequency** of the report as either when the event occurs for an immediate notification or "Daily Report" which sends all notifications for all of your subscriptions at once.
5. Click **OK** when you are done creating your subscription.

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*\*Note: If choosing the "Daily Report" option for your subscription, the time of day the daily report is sent is pre-determined by the Doc's server.*



- 1.

# Subscriptions

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## View existing Subscriptions

1. Navigate to the **Document Manager** screen.
2. **Right-Click** on the file or folder of your choice.
3. Select Manage -> Subscriptions. All subscriptions for this file or folder will be listed


## Cancel existing Subscriptions

1. Navigate to the **Document Manager** screen.
2. **Right-Click** on the file or folder of your choice.
3. Select **Manage -> Subscriptions**.
4. Place a checkmark in the box associated to the Subscription.
5. Click the **Unsubscribe** button to remove the Subscription

## View all of your existing Subscriptions system wide

4. Click on the **Home** link in the top left of the main menu.
5. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
6. Click on the **My Subscriptions** tab.

## Unsubscribe / Cancel an existing Subscription

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Subscriptions** tab.
4. Place a checkmark in the box associated to the subscription(s) you wish to cancel.
5. Click on the **unsubscribe**  button.

## Automatic cancellation of a Subscription or notification

Subscriptions and their notifications are also automatically canceled due to certain changes within the system. If the subscribed file or folder is deleted, the subscription is automatically canceled. If the permissions of a file or folder are changed such that the current subscriber no longer has the correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

# Searches

Searches allow you to search for files within your Doc's server account. You may search for files you own as well as files which are not owned by you but for which you have access permission.

There are three types of searches: Quick Search, Search and Advanced Search. Quick searches are based on the file name and file contents only, Search includes expanded options and Advanced Searches can be conducted based on multiple file criteria.

You may both save and edit searches.




## Quick Search

Quick Search (see *figure 1.0.3*) allows you to search for a file based on its name and, if your system is configured to do so, its content. Search allows you to search for a file based on the file's properties as well as content and name.

1. Type in a partial or full name into the search box.
2. Click the **Search** button, or press **enter**.

## Search

1. Click the  **Expand** button to the right of the search button.
- 2.

<b>The File or Folder Name</b>	Using the drop-down menu, select either <b>Name</b> "Contains" or "Equals". Enter the word in the <b>Name</b> field that you wish to find.
<b>File Content Contains</b>	Enter in the word(s) in the <b>Content</b> field that you wish to find.
<b>Conditions</b>	"Where <b>all</b> these conditions are met" or "Where <b>any</b> of these conditions are met"
<b>Order By</b>	Using the drop-down menu, select either <b>Order By</b> "Best Match" or "Most recently Modified".


3. Click **Search**

The search results display a list of the files matching your criteria. From here, you may open the file or perform other options (e.g. Save Search) with the available buttons.



# Searches

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## Save a search

1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search**  button.
5. Within the **Save Search** window, supply a name for the search.
6. Click **OK**.

## Save search results



1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search Results**  button.
5. Within the **Save Search Results** window, provide a name for the file and determine the location in which to save it.
6. Use the  **Expand** button in order to view your folders. Click on the folder in which you would like the file saved.
7. Click **OK**.

# Searches

## Advanced Search

Advanced Search allows you to search for a file based on standard file properties, file classification properties or a combination of those properties.



1. Click the  **Expand** button to the right of the **search**  button in order to specify the search criteria.
- 2.

<b>File or Folder Name</b>	Using the drop-down menu, select either <b>Name</b> "Contains" or "Equals". Enter the word in the <b>Name</b> field that you wish to find.
<b>File Content Contains</b>	Enter in the word(s) in the <b>Content</b> field that you wish to find.
<b>Standard Properties</b>	Using the drop down menu, select from the available standard properties such as Tags, Owner, Name, etc.
<b>Document Class Properties</b>	Using the drop down menu, select from the available document classes and their properties as specific to your environment.
<b>Order By</b>	Using the drop-down menu, select either <b>Order By</b> "Best Match" or "Most recently Modified".


# Searches

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3. Click the **Add Criteria** button.
4. You may select from standard file properties and predefined Document Class properties.
5. Select the appropriate file property and or document class in which to search and the associated criteria.
6. Click the **Add Criteria** button in order to add additional search criteria.
7. Using the drop-down menu, specify either "**Where all these conditions are met**" or "**Where any of these conditions are met**".
8. Using the drop-down menu, specify either **Order by** "Best Match" or "Most Recently Modified".
9. Click the **Search** button.

## Saved Search

Within Doc's server you may create, modify and visit your searches at any time. Not only the search results may be saved, but also the search itself. If you know that each month you must perform a search based on content or classification properties, you need only use the existing saved search.

1. Within the **Document Manager**, click the **Bookmarks and Searches**  icon to the left of the navigation bar). This will open the **Searches and Bookmarks** menu.
2. Any currently saved searches will be listed by name.
3. Click on the **saved search** of your choice in order to initiate the search.
4. The search screen will open with the results of your saved search criteria.
5. *Optionally, you may now use the **Save Search** or **Save Search Results** buttons.*

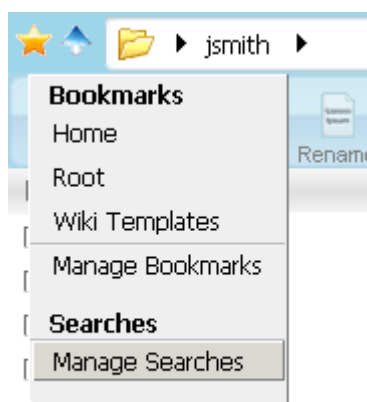
# Searches

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## ★ Last Search

1. Within the **Document Manager**, click the **Bookmarks and Searches** ★ icon to the left of the navigation bar. This will open the **Searches and Bookmarks** menu.
2. Click on the **Last Search** link.
3. The search screen will open and your last search along with any results will be listed.
4. *Optionally you may now use the **Save Search** or **Save Search Results** buttons.*

## ★ Manage Searches



1. Within the **Document Manager**, click the **bookmarks and searches** ★ icon to the left of the navigation bar. This will open the **Searches and Bookmarks** menu.
2. Click on the **Manage Searches** link.
3. The Manage Searches screen will open and all currently saved searches will be listed by name.
4. Rename or Delete the saved search by placing a checkmark in the box associated to the saved search, and then clicking either the **delete** ✕ or **rename** 📄 button.
5. Click the **Finish** button to exit the screen.