



# DoxShare User Manual

PDMS

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|-------------|----------------------------|
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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 |

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## 2 Terms of Reference

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

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

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

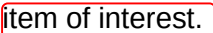
DoxShare can be accessed via web-browsers using a secure connection from anywhere with Internet access. It is optimised for Internet Explorer (version 8 and above), and the latest versions of Firefox, Safari and Chrome.

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

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

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

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

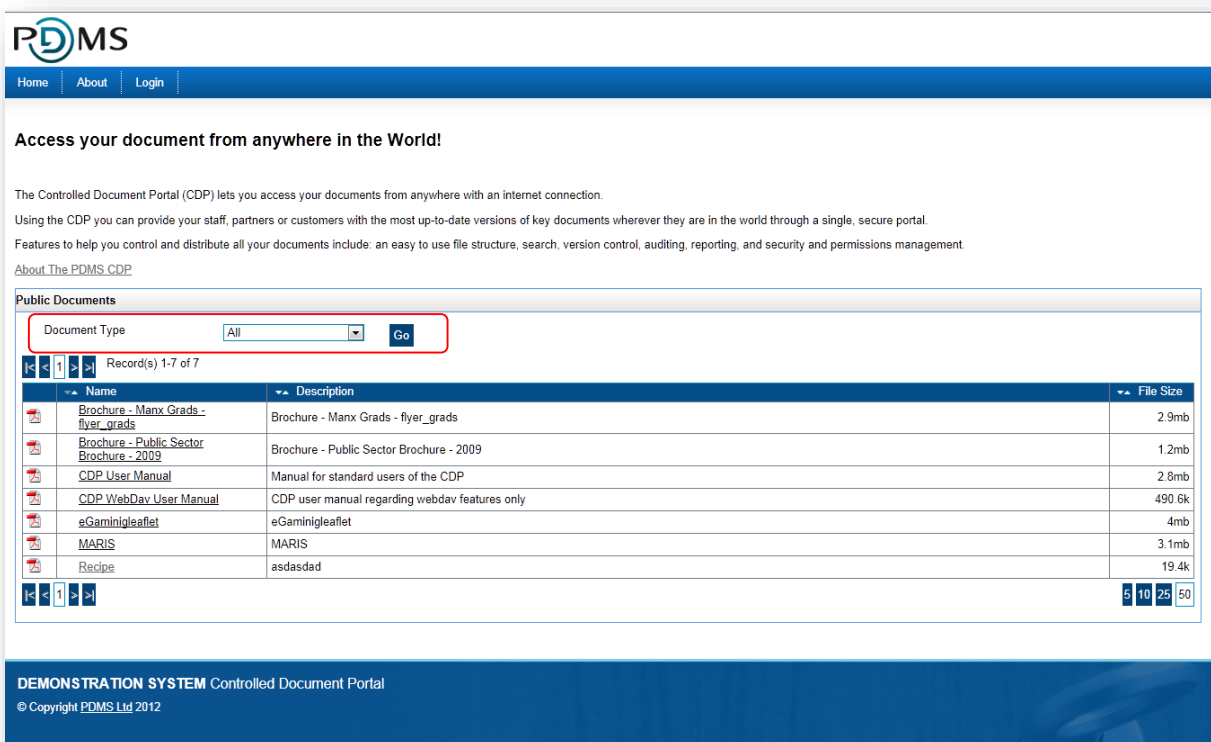
To facilitate identification of the control or icon being explained, red circles/ovals overlaying images of the system have been used as highlights, e.g.  item of interest.

## 3 DoxShare

### 3.1 DoxShare Home Page and Documents

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

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



The screenshot shows the PDMS DoxShare Home Page. At the top is the PDMS logo and navigation links: Home, About, Login. Below this is a section titled "Access your document from anywhere in the World!" with text explaining the Controlled Document Portal (CDP) and its features. A link "About The PDMS CDP" is provided. The main section is "Public Documents", which includes a "Document Type" dropdown menu set to "All" and a "Go" button. Below this is a table of documents with columns for Name, Description, and File Size. The table lists seven documents, including brochures, user manuals, and other files. At the bottom of the page, it says "DEMONSTRATION SYSTEM Controlled Document Portal" and "© Copyright PDMS Ltd 2012".

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

#### 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.

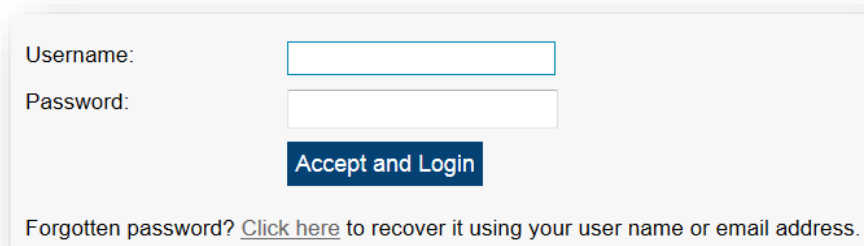
## 3.2 Login, Logoff and Password Recovery

*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



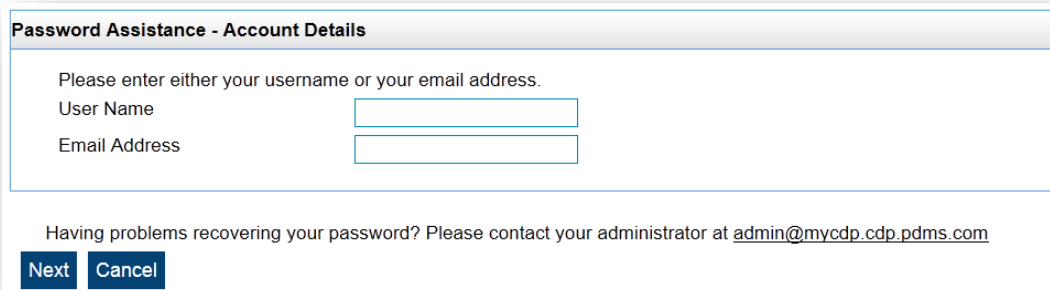
The Login link, at the top left of the Home Page, displays the Login page via which, by entry of the Username and Password combination supplied to you in the first instance by your DoxShare Administrator, you can access DoxShare.

The image shows a login form with two input fields: 'Username:' and 'Password:'. Below the fields is a blue button labeled 'Accept and Login'. At the bottom of the form, there is a link for password recovery: 'Forgotten password? [Click here](#) to recover it using your user name or email address.'

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

## 3.2.2 Forgotten Password

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



**Password Assistance - Account Details**

Please enter either your username or your email address.

User Name

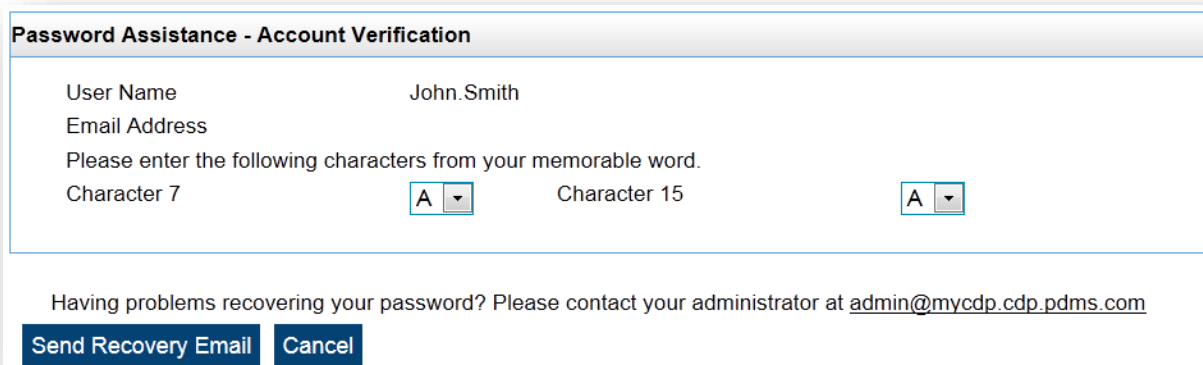
Email Address

Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)

**Next** **Cancel**

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

This will open the Password Assistance – Account Verification window.



**Password Assistance - Account Verification**

User Name John.Smith

Email Address

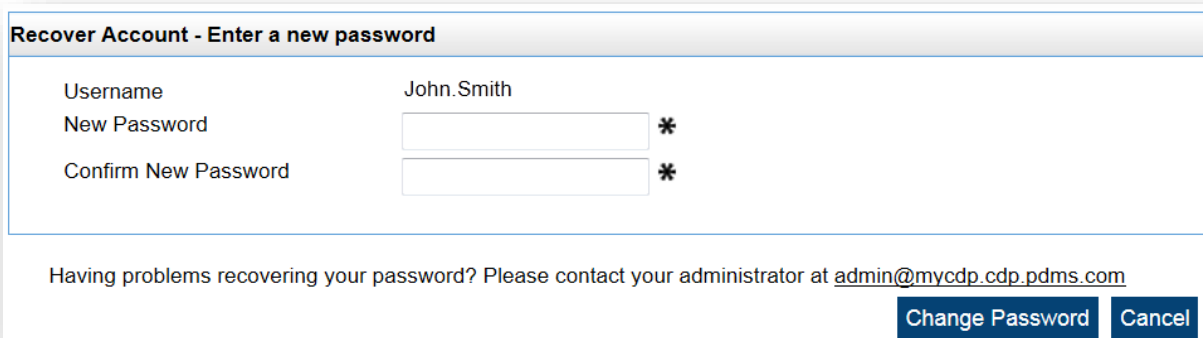
Please enter the following characters from your memorable word.

Character 7  Character 15

Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)

**Send Recovery Email** **Cancel**

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



**Recover Account - Enter a new password**

Username John.Smith

New Password  \*

Confirm New Password  \*

Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)

**Change Password** **Cancel**

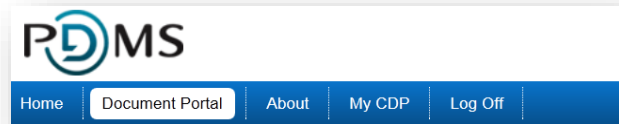
---

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

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

### 3.2.3 Log Off

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





## 3.3 MyDoxShare

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

### 3.3.1 User Details

The User Details menu option displays your account details.

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

The screenshot shows the PDMS logo at the top left. Below it is a navigation bar with links: Home, Document Portal, About, My CDP (highlighted), and Log Off. Underneath the navigation bar are three tabs: User Details (selected), Change Password, and Change Memorable Word. The main content area is titled 'Account Details' and contains a table with the following information:

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

At the bottom right of the table is a blue 'Edit' button.

### 3.3.2 Change Password

The screenshot shows a form titled 'Change My Password'. It contains three input fields with labels and password strength indicators (\*):

- Old Password
- New Password
- Confirm New Password

A blue 'Save' button is located at the bottom right of the form.

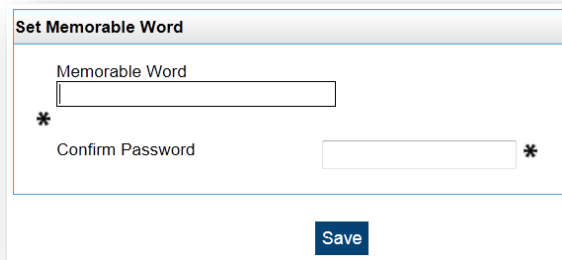
To change your Password, click the Change Password menu option.

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

Press the Save command button.

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

### 3.3.3 Change Memorable Word



The screenshot shows a dialog box titled "Set Memorable Word". It has two text input fields. The first field is labeled "Memorable Word" and has an asterisk (\*) to its left. The second field is labeled "Confirm Password" and has an asterisk (\*) to its right. Below the fields is a blue button labeled "Save".

Your Memorable Word is used during the forgotten Password process.

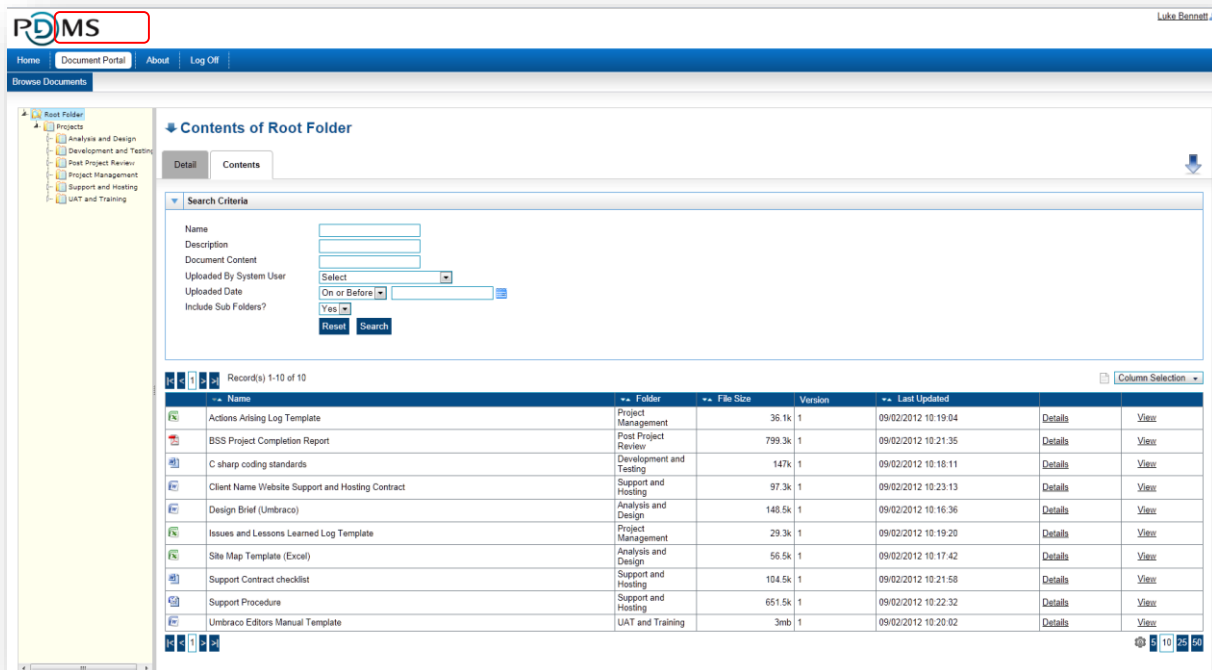
To set/change your Memorable Word, click the Change Memorable Word menu option.

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:



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

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

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

### 3.4.2 DoxShare Navigation Methods

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

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

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

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

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

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

### 3.4.3 DoxShare Icons

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

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

## 3.5 DoxShare Folders

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

### 3.5.1 Folder Contents / Document Lists

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

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

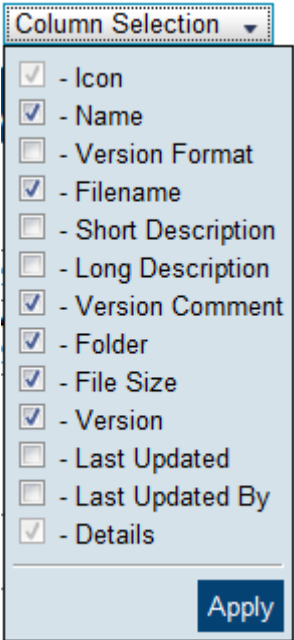
| Name                                         | Folder                                 | Version     | Last Updated        | Details                 | View                 |
|----------------------------------------------|----------------------------------------|-------------|---------------------|-------------------------|----------------------|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

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

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

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

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

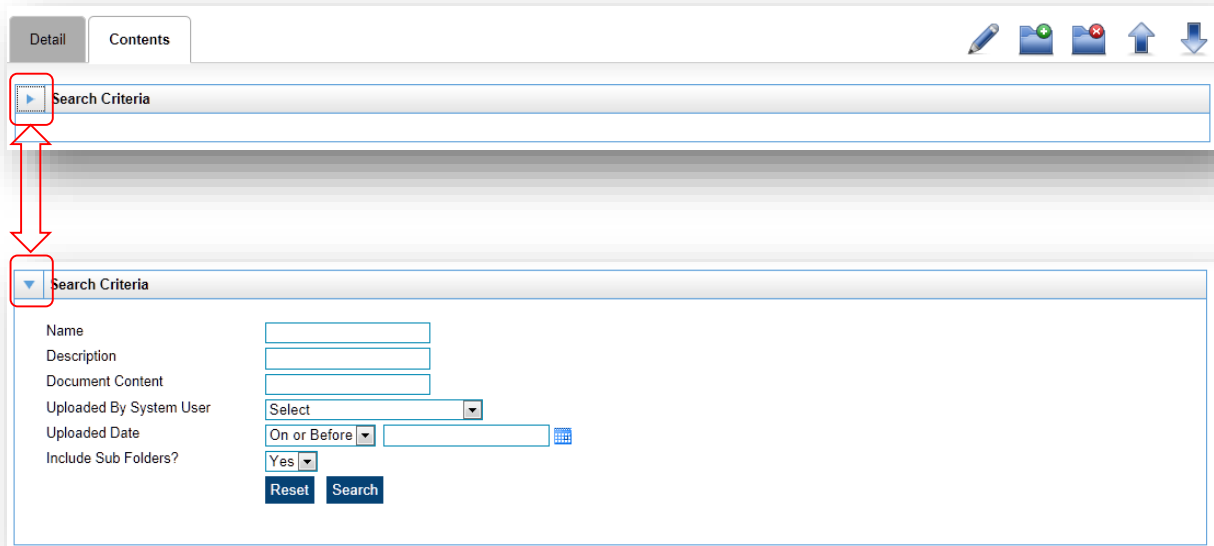


| Column Selection                                      |
|-------------------------------------------------------|
| <input checked="" type="checkbox"/> - Icon            |
| <input checked="" type="checkbox"/> - Name            |
| <input type="checkbox"/> - Version Format             |
| <input checked=""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

Apply

## 3.5.2 Search Functions

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

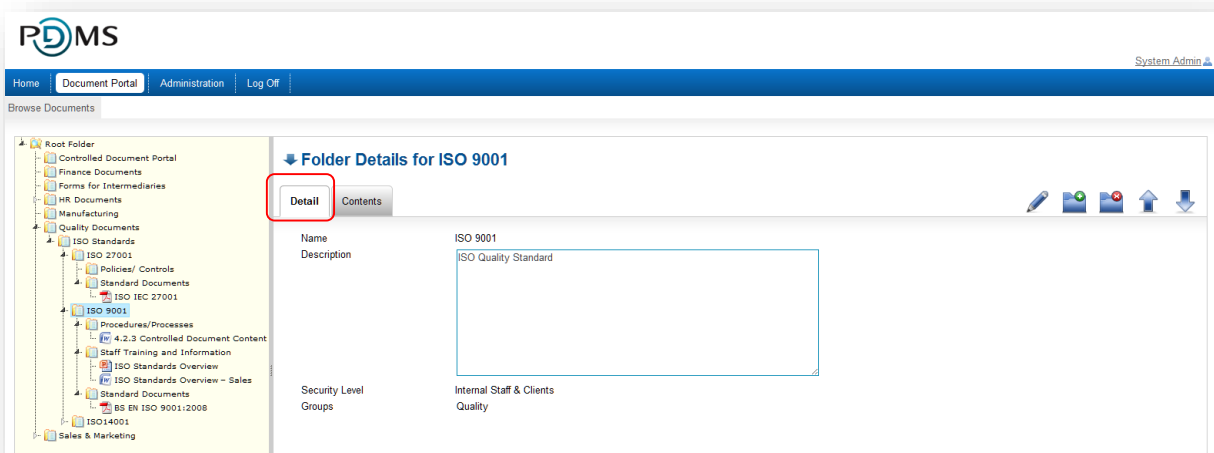


To collapse the search pane, click on  the command.

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

## 3.5.3 Viewing Folder Attributes

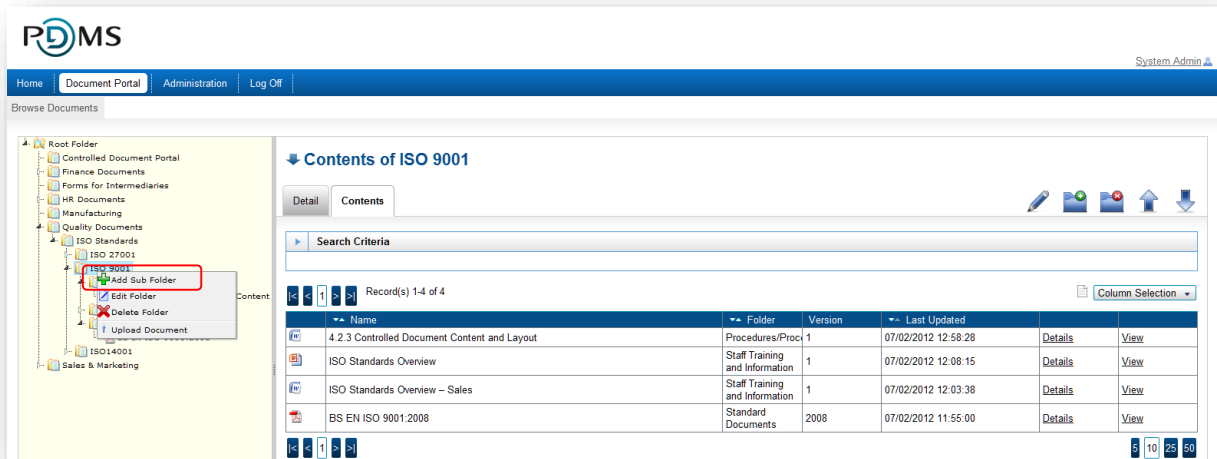
The attributes of the selected Folder can be viewed by selecting the **Detail** tab.



### 3.5.4 Adding a Sub-Folder

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

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



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



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

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

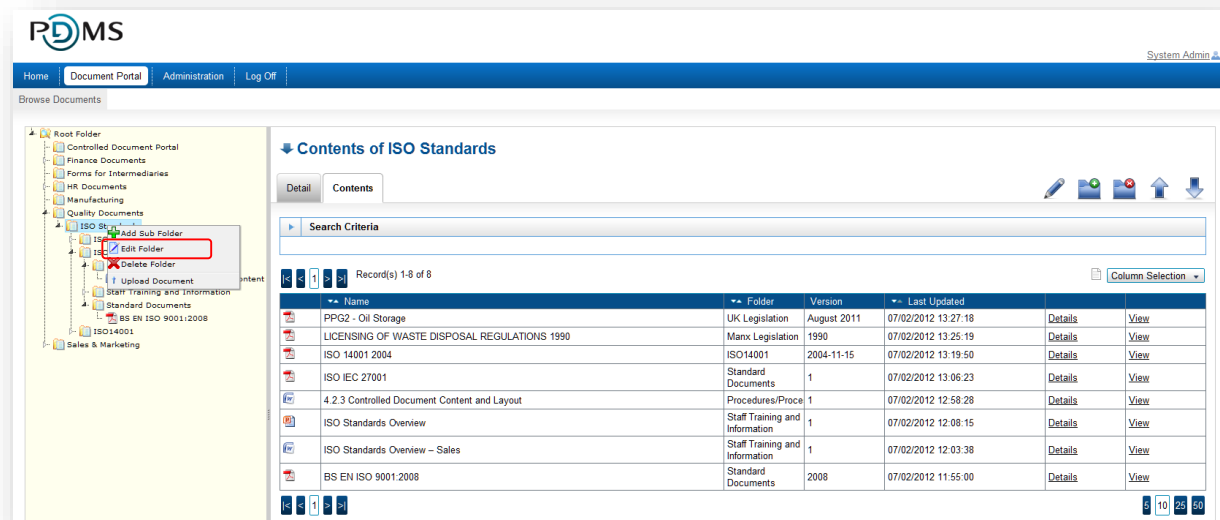
| Field          | Details                                                                                                                                                                                        | Notes                                                                                   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

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

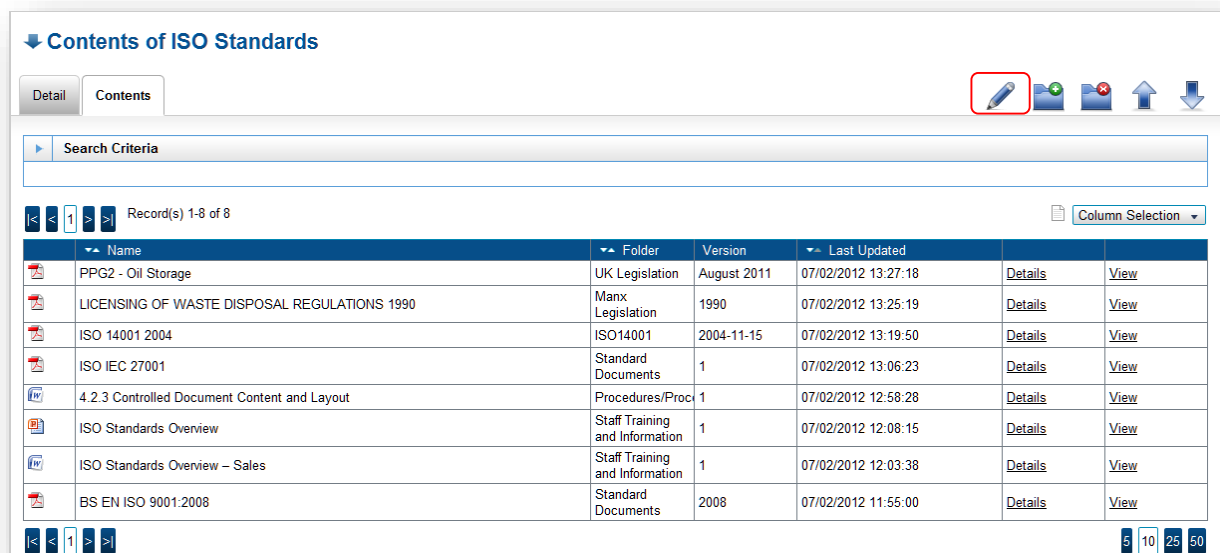
### 3.5.5 Editing a Folder's Details

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

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



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



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

### 3.5.6 Deleting a Folder

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

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

Contents of ISO Standards

Detail Contents

Search Criteria

Record(s) 1-8 of 8

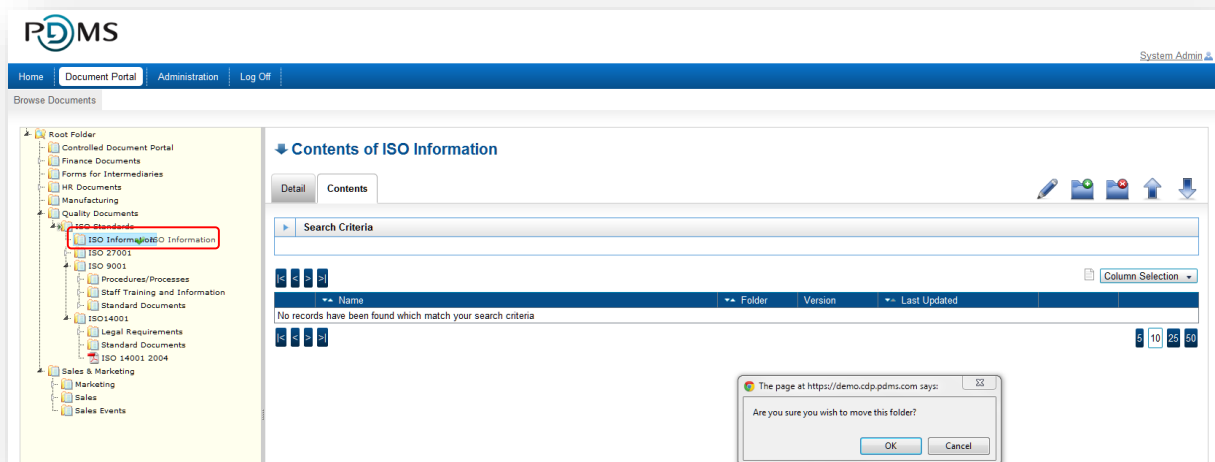
| Name                                         | Folder                         | Version     | Last Updated        | Details | View |
|----------------------------------------------|--------------------------------|-------------|---------------------|---------|------|
| PPG2 - Oil Storage                           | UK Legislation                 | August 2011 | 07/02/2012 13:27:18 | Details | View |
| LICENSING OF WASTE DISPOSAL REGULATIONS 1990 | Manx Legislation               | 1990        | 07/02/2012 13:25:19 | Details | View |
| 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 |
| 4.2.3 Controlled Document Content and Layout | Procedures/Proci               | 1           | 07/02/2012 12:58:28 | Details | View |
| ISO Standards Overview                       | Staff Training and Information | 1           | 07/02/2012 12:08:15 | Details | View |
| ISO Standards Overview – Sales               | Staff Training and Information | 1           | 07/02/2012 12:03:38 | Details | View |
| 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  icon is displayed to indicate that the Folder cannot be dropped into the underlying Folder (e.g. a folder cannot be dragged into one of its own sub-folders). The icon changing to a  indicates that the Folder can be dropped into the underlying Folder. Prior to moving the Folder, a confirmation dialogue will be displayed.



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

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

## 3.6 Documents in DoxShare

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

### 3.6.1 Browsing Documents

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

**PDMS** System Admin

Home | Document Portal | Administration | About | Log Off

Browse Documents

**Contents of ISO 9001**

Detail | Contents

Search Criteria

Record(s) 1-4 of 4

| Name                                                         | Filename                                     | Version Comment | Folder                         | File Size | Version |                         |
|--------------------------------------------------------------|----------------------------------------------|-----------------|--------------------------------|-----------|---------|-------------------------|
| <a href="#">4.2.3 Controlled Document Content and Layout</a> | 4.2.3 Controlled Document Content and Layout | First version   | Procedures Processes           | 167.5k    | 1       | <a href="#">Details</a> |
| <a href="#">ISO Standards Overview</a>                       | ISO Standards Overview                       | First Version   | Staff Training and Information | 2.6mb     | 1       | <a href="#">Details</a> |
| <a href="#">ISO Standards Overview - Sales</a>               | ISO Standards Overview - Sales               | First Version   | Staff Training and Information | 52k       | 1       | <a href="#">Details</a> |
| <a href="#">BS EN ISO 9001_2008</a>                          | ISO 9001 2008                                | November 2008   | Standard Documents             | 406.4k    | 2008    | <a href="#">Details</a> |

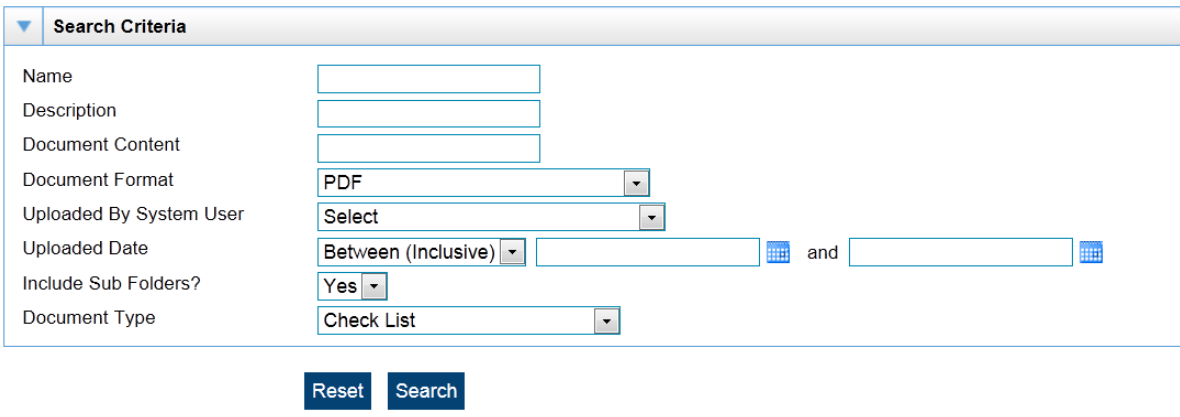
search criteria, the default setting of this search variable is this behaviour is controlled by a system setting so may have been altered by your system administrator)

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

## 3.6.2 Searching for Documents

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

The criteria on which a search will be performed are:



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

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

### 3.6.3 Viewing Information about a Document

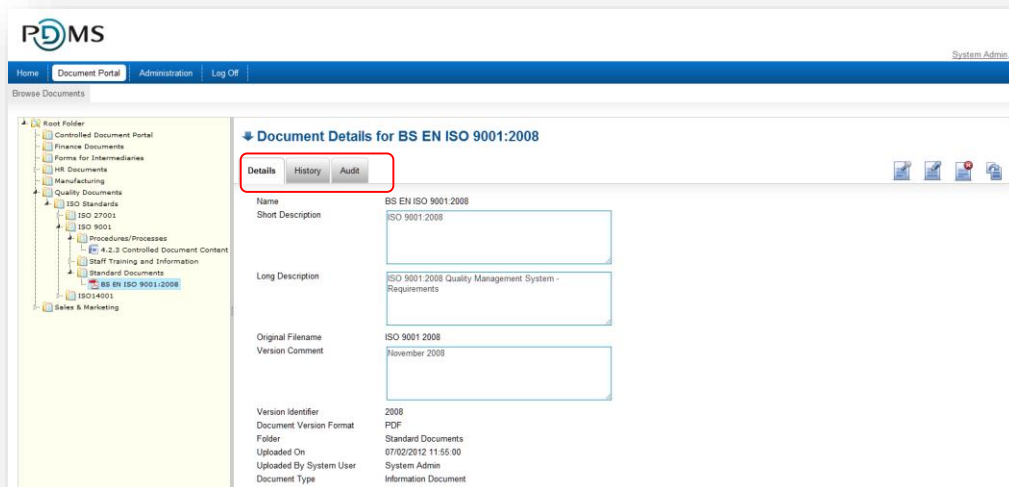
The information about a Document can be viewed by either clicking on the Document in the folder tree-view, or by selecting the “Details” option displayed against the Document in the Folder contents list.

The screenshot shows the PDMS Document Portal interface. The top navigation bar includes links for Home, Document Portal, Administration, About, and Log Off. The 'Document Portal' tab is active. On the left, a folder tree shows the hierarchy: Root Folder > Quality Documents > ISO Standards > ISO 9001. The main content area is titled 'Contents of ISO 9001' and has two tabs: 'Detail' and 'Contents'. The 'Contents' tab is active, displaying a table of documents. The first document, '4.2.3 Controlled Document Content and Layout', has its 'Details' link highlighted with a red box. Below the table, there are pagination controls showing 'Record(s) 1-4 of 4' and a 'Column Selection' dropdown.

| Name                                         | Filename                                     | Version Comment | Folder                         | File Size | Version |                         |
|----------------------------------------------|----------------------------------------------|-----------------|--------------------------------|-----------|---------|-------------------------|
| 4.2.3 Controlled Document Content and Layout | 4.2.3 Controlled Document Content and Layout | First version   | Procedures Processes           | 167.5k    | 1       | <a href="#">Details</a> |
| ISO Standards Overview                       | ISO Standards Overview                       | First Version   | Staff Training and Information | 2.6mb     | 1       | <a href="#">Details</a> |
| ISO Standards Overview – Sales               | ISO Standards Overview - Sales               | First Version   | Staff Training and Information | 52k       | 1       | <a href="#">Details</a> |
| BS EN ISO 9001_2008                          | ISO 9001 2008                                | November 2008   | Standard Documents             | 406.4k    | 2008    | <a href="#">Details</a> |

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

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



### 3.6.3.1 Document Details

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

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



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

### 3.6.4 Viewing a Document

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

**Contents of ISO 9001**

Search Criteria

Record(s) 1-4 of 4

| Name                                         | Filename                                     | Version Comment | Folder                         | File Size | Version | Details                 |
|----------------------------------------------|----------------------------------------------|-----------------|--------------------------------|-----------|---------|-------------------------|
| 4.2.3 Controlled Document Content and Layout | 4.2.3 Controlled Document Content and Layout | First version   | Procedures Processes           | 167.5k    | 1       | <a href="#">Details</a> |
| ISO Standards Overview                       | ISO Standards Overview                       | First Version   | Staff Training and Information | 2.6mb     | 1       | <a href="#">Details</a> |
| ISO Standards Overview – Sales               | ISO Standards Overview - Sales               | First Version   | Staff Training and Information | 52k       | 1       | <a href="#">Details</a> |
| BS EN ISO 9001_2008                          | ISO 9001 2008                                | November 2008   | Standard Documents             | 406.4k    | 2008    | <a href="#">Details</a> |

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.

PDMS

System Admin

Home Document Portal Administration About Log Off

Browse Documents

Root Folder

- Controlled Document Portal
- Finance Documents
- Forms for Intermediaries
- HR Documents
- Projects
- Quality Documents
- ISO Standards
  - ISO 27001
  - ISO 9001
  - ISO Information
  - ISO14001
- REG CDP Demo
- Sales & Marketing

Upload Document

Detail Contents

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

Select File  Browse... \*

Name  \*

Short Description  \*

Long Description

Version Comment

Version  \*

Document 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.



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

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

### 3.6.7 Replacing a Document

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

## ↓ Replace Document ISO 14001 2004

| Details                                                                                                                                                                                                                                                                                                                                                 | History                                                                                            | Audit |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-------|
| <div></div> |                                                                                                    |       |
| <p>Please ensure that your document is no larger than 4MB and has been virus checked.</p>                                                                                                                                                                                                                                                               |                                                                                                    |       |
| Select File                                                                                                                                                                                                                                                                                                                                             | <input type="text"/> <input type="button" value="Browse..."/>                                      |       |
| *                                                                                                                                                                                                                                                                                                                                                       |                                                                                                    |       |
| Name                                                                                                                                                                                                                                                                                                                                                    | <input type="text" value="ISO 14001 2004"/> *                                                      |       |
| Short Description                                                                                                                                                                                                                                                                                                                                       | <input type="text" value="ISO Environment"/> *                                                     |       |
| Long Description                                                                                                                                                                                                                                                                                                                                        | <input type="text" value="Environmental management systems - Requirements with guidance for use"/> |       |
| Version Comment                                                                                                                                                                                                                                                                                                                                         | <input type="text"/>                                                                               |       |
| Previous Version                                                                                                                                                                                                                                                                                                                                        | <input type="text" value="2004-11-15"/>                                                            |       |
| Version                                                                                                                                                                                                                                                                                                                                                 | <input type="text"/> *                                                                             |       |
| Document Type                                                                                                                                                                                                                                                                                                                                           | <input type="text" value="Information Document"/> *                                                |       |
| <div><input type="button" value="Save"/> <input type="button" value="Cancel"/></div>                                                                                                                                                                                                                                                                    |                                                                                                    |       |

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.

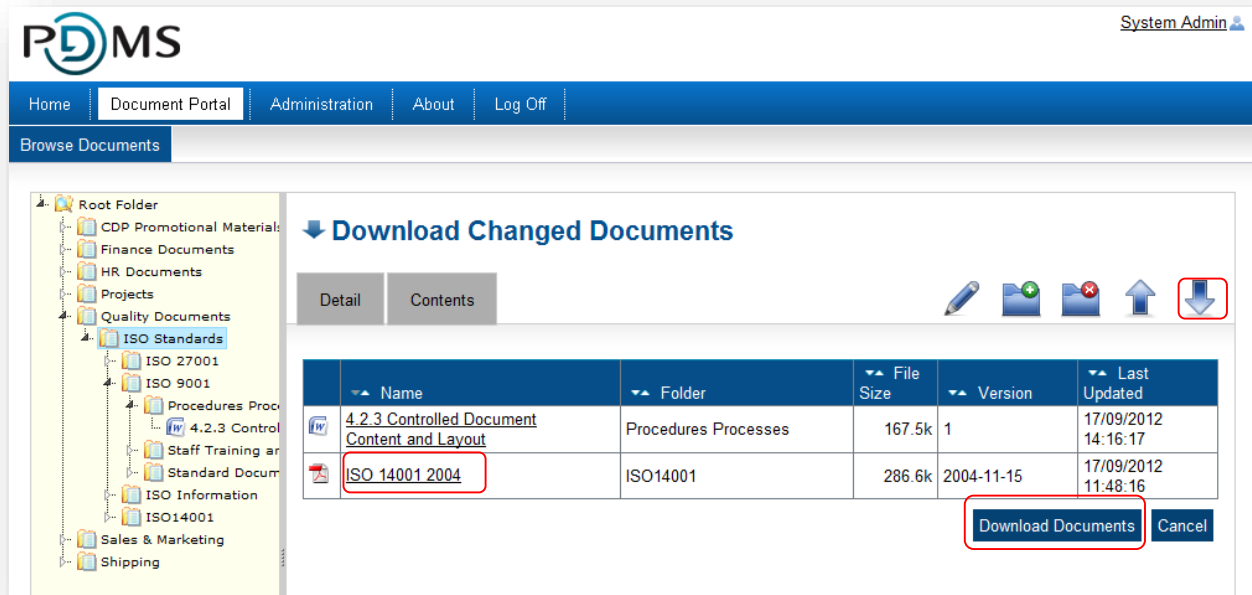
### 3.6.8 Deleting a Document

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



### 3.6.9 Downloading Changed Documents

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



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.

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## 4 DoxShare Personal

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### 4.1 Introduction to DoxShare Personal

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

DoxShare Personal:

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

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

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

## 4.2 Installation of DoxShare Personal

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

It requires the following:

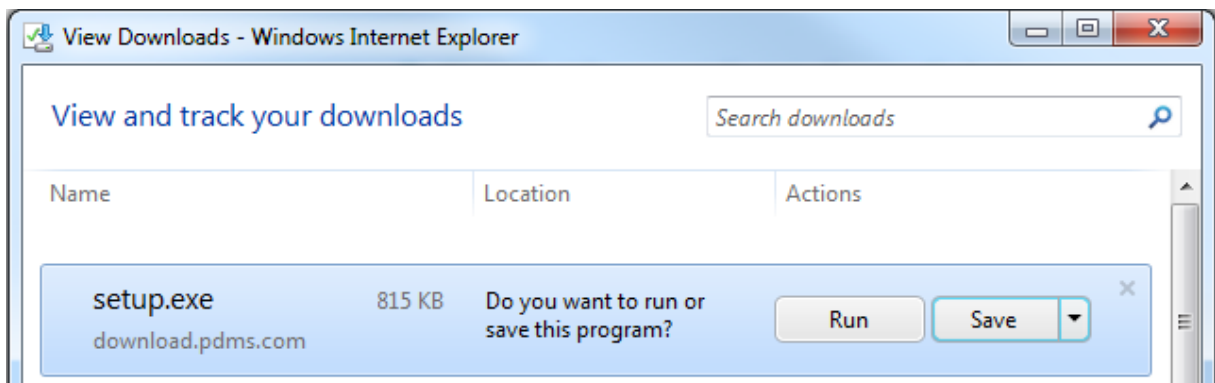
- Windows Installer 4.5
- Microsoft .NET Framework 4 Client Profile (x86 and x64)
- SQL Server Compact 4.0

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

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

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

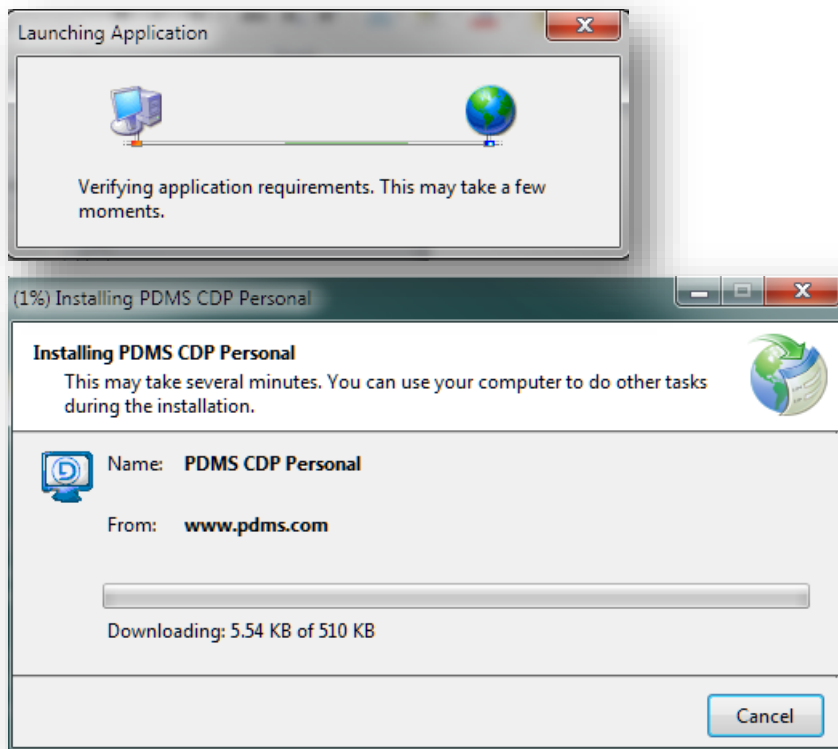
The subsequent process will vary depending on your operating system version and security policies, but an example is now described. You may require the assistance of your network Administrator to complete the installation.



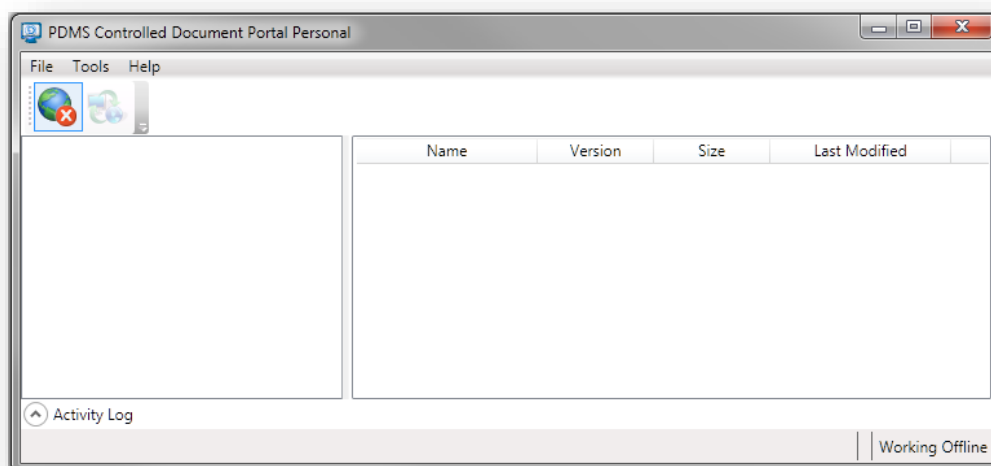
Choose Run in response to the above, or a similar, dialog.



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



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



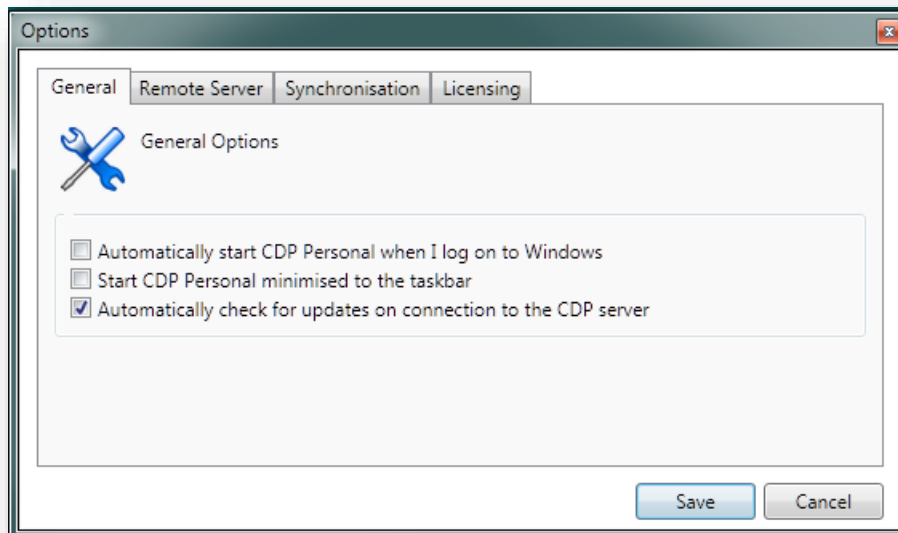
At this point, DoxShare Personal is installed on your computer, and can be accessed from the Start Menu at:

**All Programs > PDMS > DoxShare > PDMS DoxShare Personal**

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

## 4.3 Configuration of DoxShare Personal

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



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

### 4.3.1 General DoxShare Personal Settings

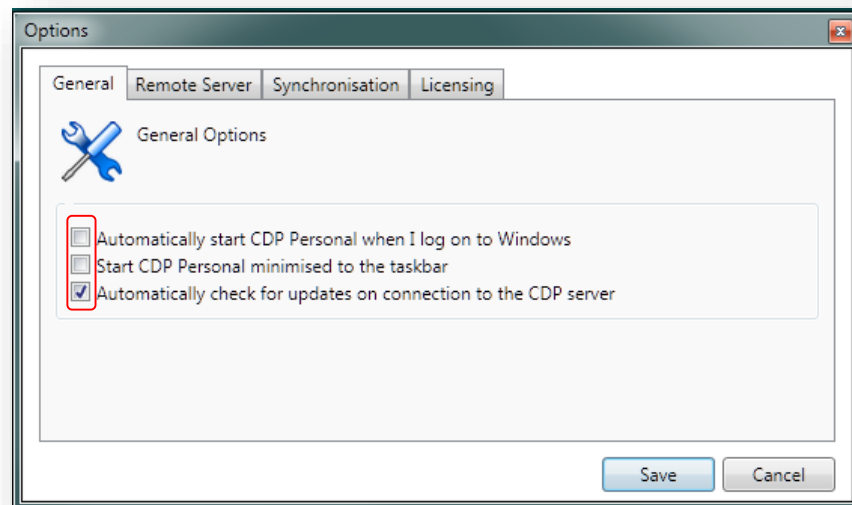
The “General” tab contains the following settings, detailed with their default settings:

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

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

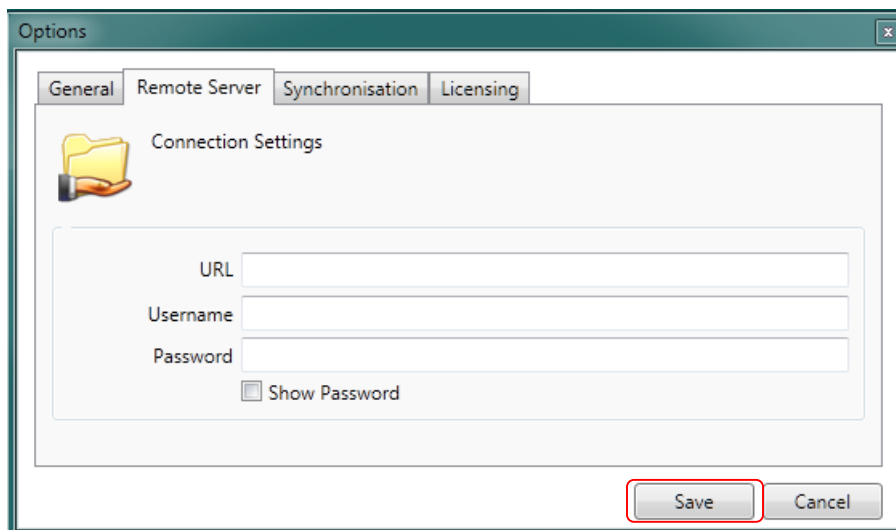
To change these settings according to your own preferences, check/uncheck the checkbox next to the appropriate option(s) and click “Save”.

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



### 4.3.2 Remote Server Connection Settings for DoxShare Personal

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



The dialog box shown above should be updated as follows:

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

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

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

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

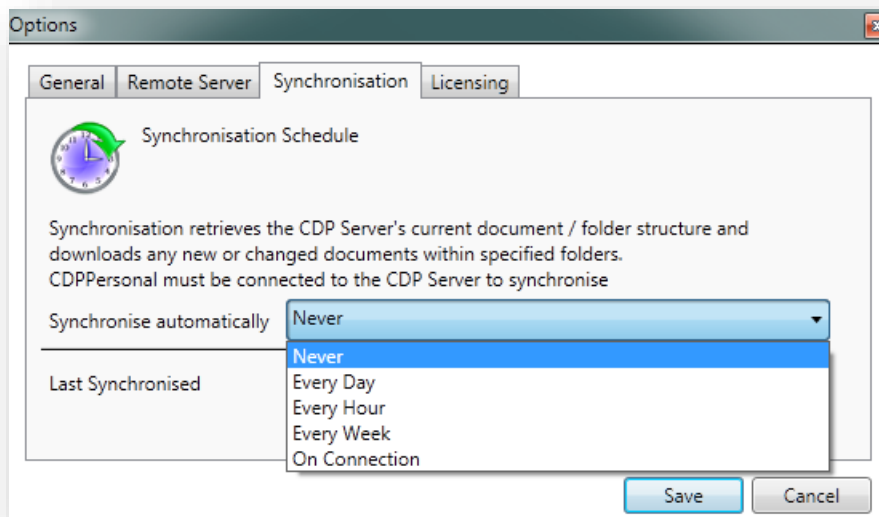
Click “Save” to save this configuration information.

### 4.3.3 DoxShare Personal Synchronisation Schedule

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

The synchronisation frequency options available are:

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



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

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

#### Notes:

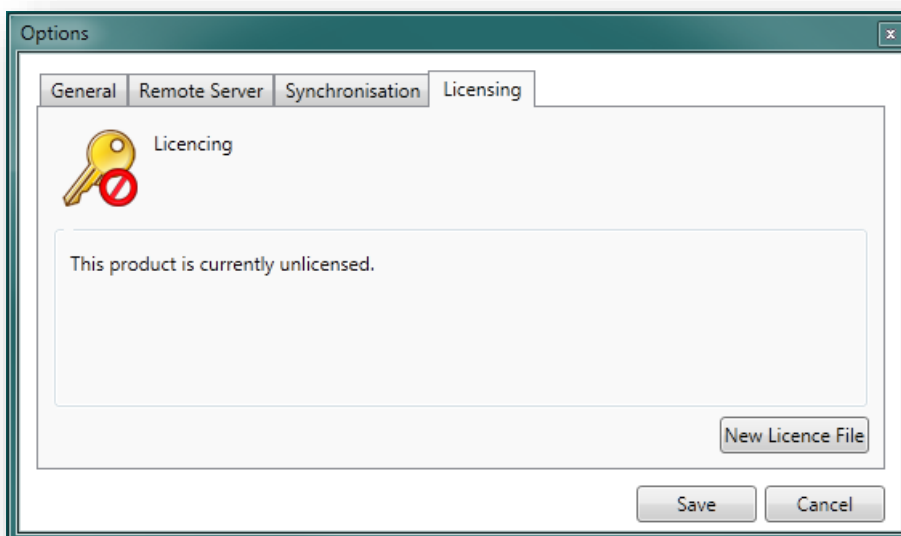
1. If no Documents have been updated to your DoxShare web application since DoxShare Personal last synchronised, then no data will be transferred.
2. Consideration should be given to your connectivity to your DoxShare web application when selecting the synchronise schedule.

### 4.3.4 DoxShare Personal License

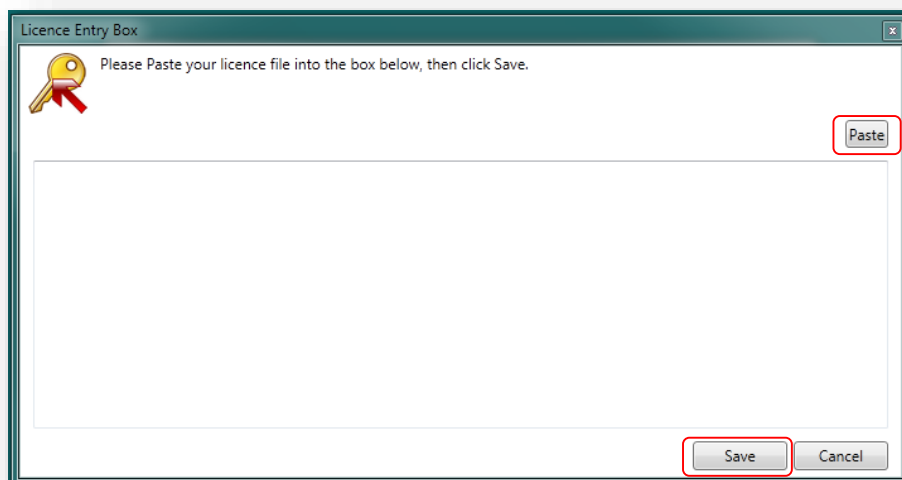
The “Licensing” tab is where you install the DoxShare Personal licence ‘key’. You will need to request a Licence, which is a long series of apparently random letters and numbers, from your DoxShare Administrator.

Once you have received a licence:

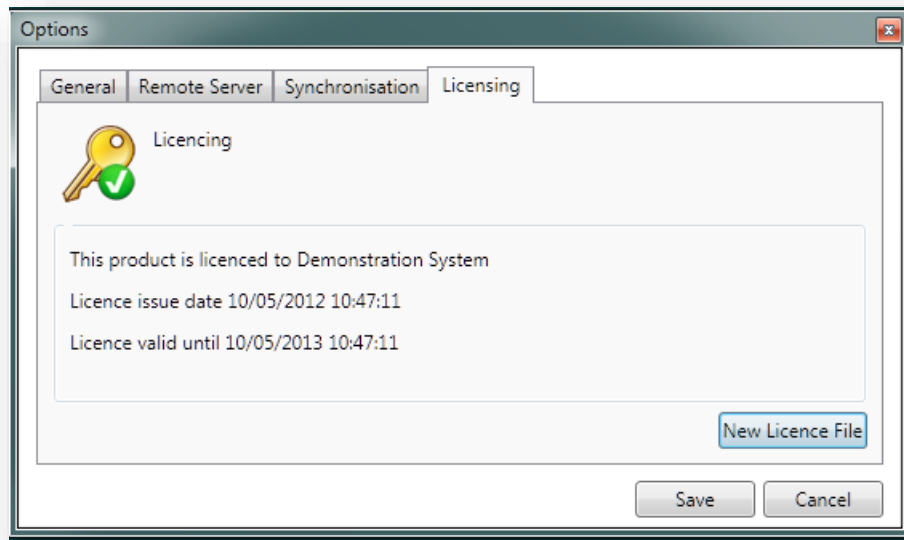
1. Copy the Licence provided to you by your DoxShare Administrator to your Windows Clipboard.
2. Click the “New Licence File” button.



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



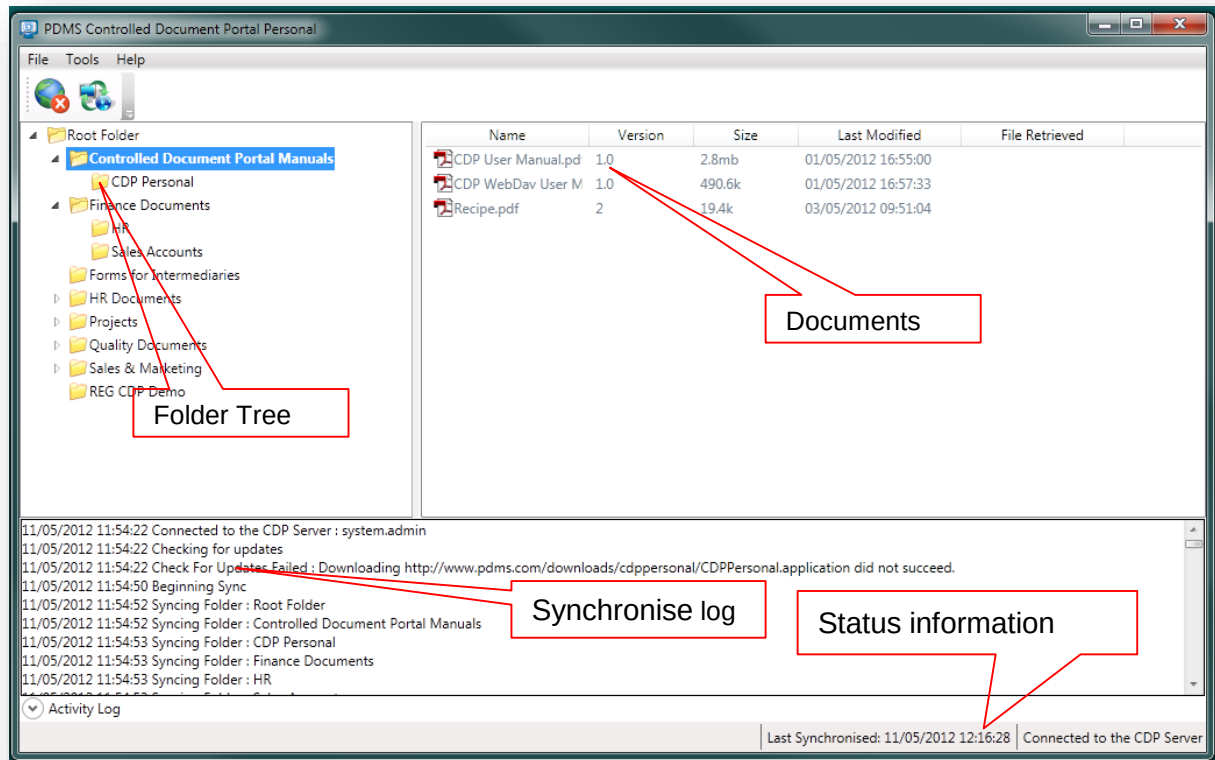
This completes the licencing of DoxShare Personal. The Licence details can be viewed at any time by selecting the Licensing tab.



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

## 4.4 DoxShare Personal Main Window

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



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



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



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

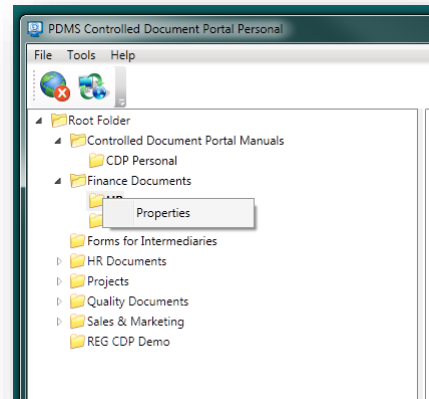
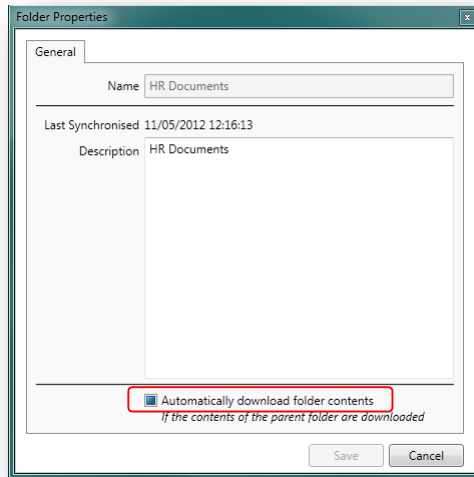
At the bottom of the window is an expandable “**Activity Log**” which can be used to check which documents have been synchronised. Click the “Up” arrow to expand the Activity Log window, and the “Down” arrow to minimise it.

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



### 4.4.1 Configuring a Folder for Automatic Download

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

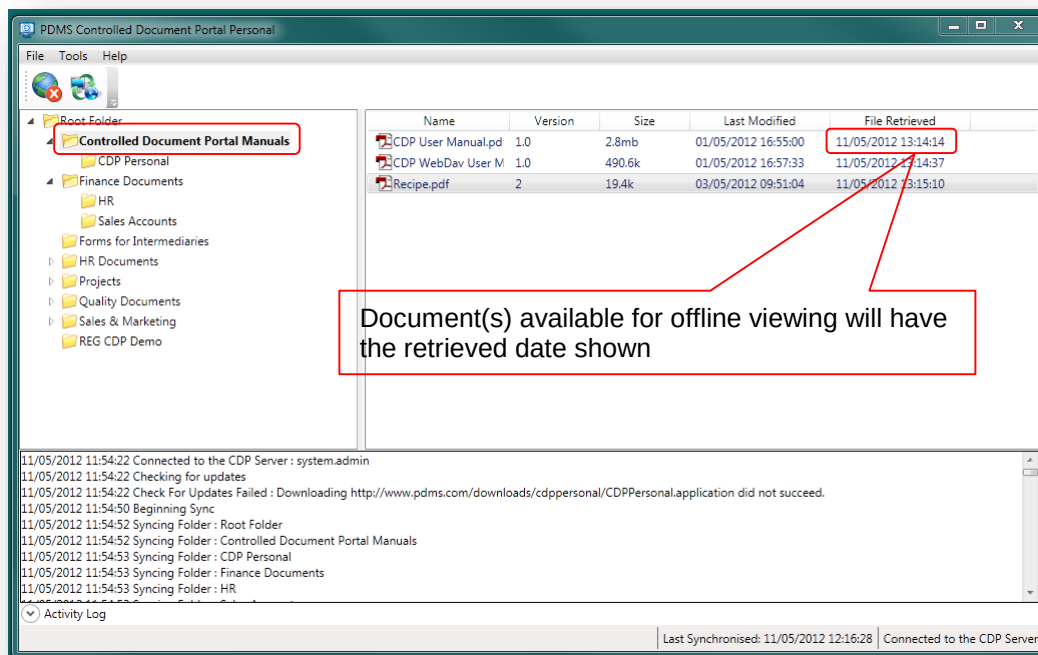


Then, in the Folder Properties dialog, check the “Automatically download folder contents” checkbox.

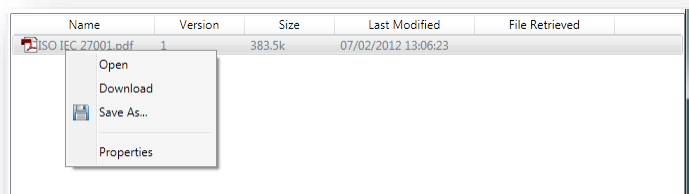
The contents of the Folder will then be automatically Downloaded to your DoxShare personal on synchronisation with your DoxShare web application, both when a manually and when a synchronisation is performed as per a Synchronisation Schedule set up by you (see **DoxShare Personal Synchronisation Schedule**,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

## 4.4.2 Downloading and Viewing Documents

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

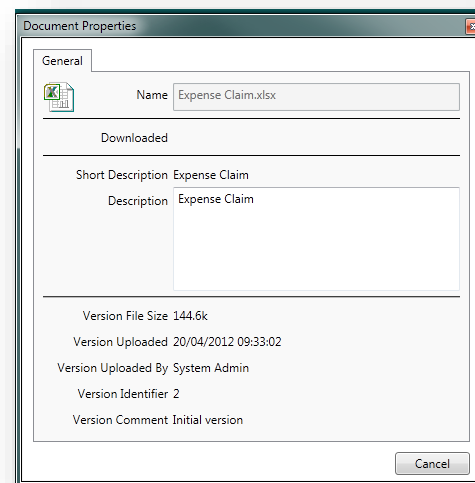


The behaviour of the functions that can be performed on Documents depends on whether or not DoxShare Personal is connected to your DoxShare web application. All are available by right clicking the Document.



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

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

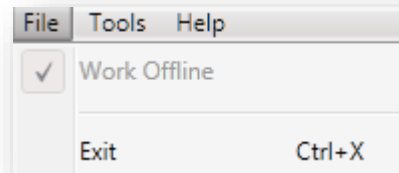


## 4.5 DoxShare Personal Menus

### 4.5.1 File

The File menu contains two options:

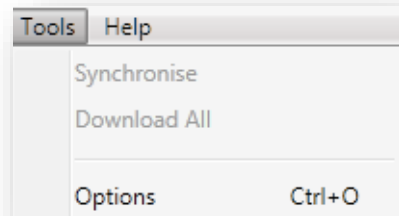
- **Work Offline:** This switch is used to control if the application is Online or Offline (i.e. connected or not connected to your DoxShare web application). When Offline, you can only see Folders that have been synchronised and access Documents that have been downloaded.
- **Exit:** This option will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



### 4.5.2 Tools

The tools menu contains three options:

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



## 4.5.3 Help

The Help menu contains three options:

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

