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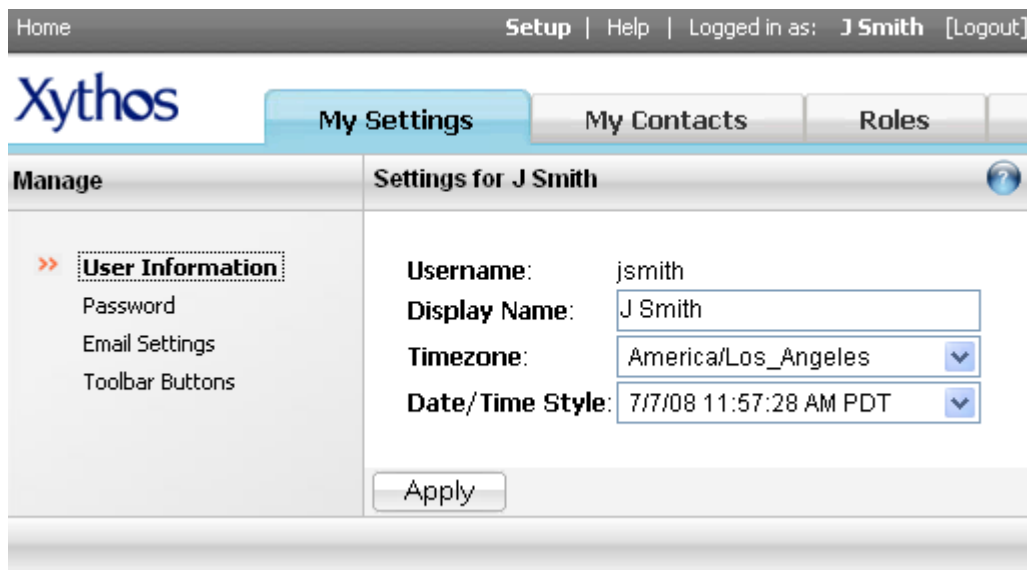
Other Features

My Settings

Your personal settings can be accessed by clicking on the **Setup** link (see *figure 1.0.1*) in the upper right corner of the web view. Within the setup space, you have access to modify your personal settings, your contacts and groups; you may have additional options if your administrator has granted you permission to manage and edit roles, manage workflow templates and classification. Depending on your user model (e.g. using LDAP), you may not be able to modify some personal settings.



(Figure 8.0.0)



(Figure 8.0.1)

Username

The Username is the name provided by your Administrator and typically will be a combination of the first letter of your first name and your entire last name. For example, if your name is Jane Smith, then your Username will be jsmith. You may only view this setting from within your “My Settings” tab. You may not modify this setting.

Display Name

The Display Name is typically your first and last name. For example, if your name is Jane Smith, then your Display Name will be Jane Smith. You may modify this setting if necessary. The Display Name is visible during sharing, emailing and other functions.

Timezone

The Timezone is the time in which you reside. For example, if you live in California you will select the “America/Los Angeles” option. If the Timezone is not set properly, all time-stamped items will be incorrect. You may modify this setting if necessary.

Date/Time Style

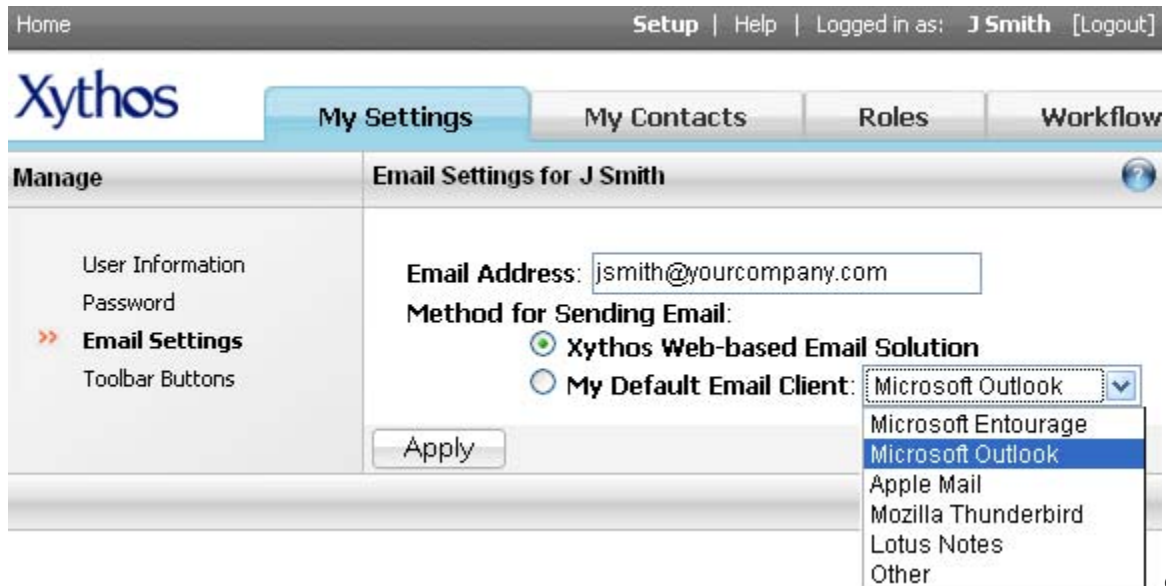
The Date/Time Style is the way in which you wish both the date and the time to be shown. There are 16 available styles to choose from. The options vary from "12/19/07" to "Wednesday, December 19, 2007 12:23:15 PM PST". If the Date/Time is not set to your liking, you modify this setting which will be reflected in all time-stamped items.



(Figure 8.0.2)

Password

The Password is the password which is used to access your account, whether it is through the web view or through the Xythos drive. It is possible that you may not modify your password depending on the type of environment your administrator has setup.



8.0.3)

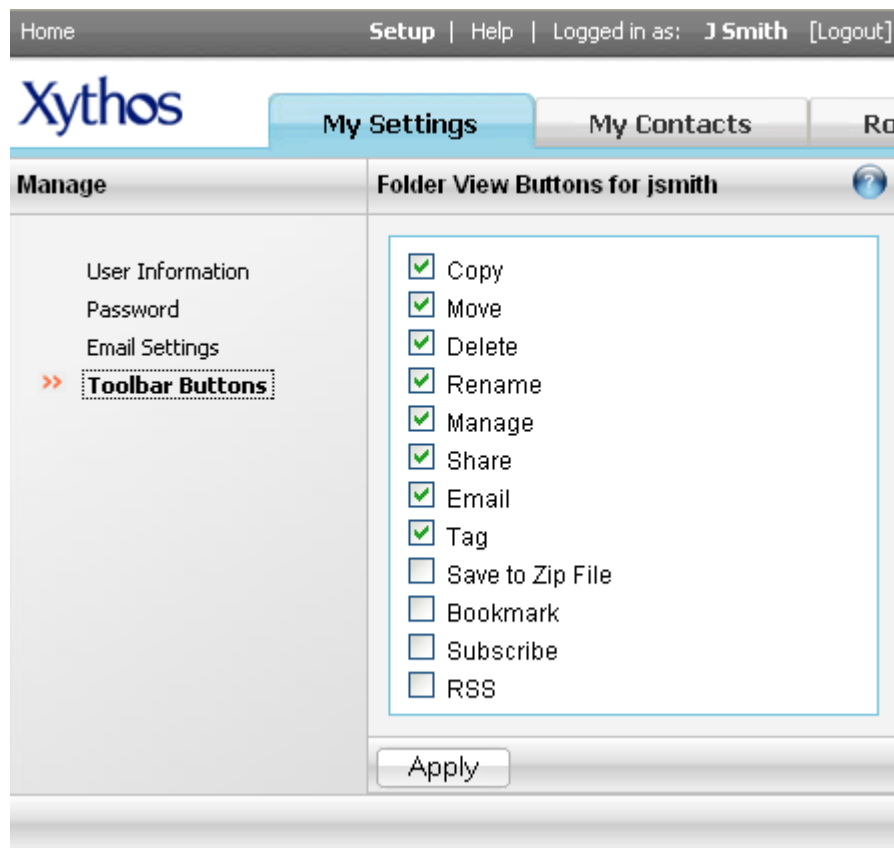
(Figure

Email Settings

The Email address is used during Email notifications when a resource has been shared, a task is in need of managing, and other such system notification emails. Verify the validity of this email address; otherwise you will miss out on important information. You may modify this setting if necessary.

The method for sending email may or may not be available, depending on your environment's configuration. If enabled, you have the option to select either Xythos Web-based Email Solution or My Default Email Client. Selecting the "Xythos Web-based Email Solution" will use the email screens within the web view. Selecting the "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending email. You must select your true default email client. If, for example your default email client on your computer is Microsoft Outlook and you set your Default Email Client in Xythos to Lotus Notes, Microsoft Outlook will be launched. Selecting the incorrect email client can cause unfavorable results.

The Email address is visible during sharing, emailing and other functions.



(Figure 8.0.4)

Toolbar Buttons

This section determines which buttons will appear, by default, in your toolbar. You may modify the toolbar buttons at any time.

Export

If your file system seems to be growing to an unmanageable size or you wish to move content to another system, you may Export part or all of your file system. Exporting your content moves files into the target destination folder and creates one XML file for the options chosen. In order to perform an export, you must have the Export Objects or Export Objects (Ignore Permissions) ability.

The difference between the two abilities is: Export Objects only allows you to export those objects that you have administer permission on where Export Objects (Ignore Permissions) allows you to export all objects regardless of the permissions you have on those objects.

Export content

1. Click on the **Home** link in the main menu, in the upper left corner.
2. Click on the **Reports & Tools** tab.
3. Click on the **Export** tab.
4. Define the export **parameters**:

Option	Description
Source	This is the content you wish to export out of the system. The default is the top level of your file collaboration space. However, you can drill down into any sub-folder within this space.
Destination Folder	This is where your content will be copied. You can choose to export content to a folder within the collaboration space or within the Records Management space.
Destination XML Filename	This is the name of the XML file that will contain metadata, document classes and roles information. You must name the file with an .xml extension.
Log Folder	The export will generate a log file and you determine in what folder this file will be located. The log folder and destination folder cannot be the same folder.
Log File Name	Name the log file that will be located in the folder above.

5. Select the appropriate export **options**:

Option	Description
Overwrite exported file content if it already exists	If the file content already exists and you do not select this option, the content will not be exported.
Include Roles	Exports the name, description, whether the role can be edited through the web view or not, the abilities associated with the role and all users who have been assigned to the role. Every role in the system is exported in this manner.
Include Abilities	Exports the name, description and dependencies of every ability in the system.
Include Users & Groups	For Users, export includes the user's name, virtual server, home folder, display name, email address, language preference, timezone, date format, and password. For Groups, export includes the group's name, virtual server, description, and the group's member users.
Include Document Classes	Exports the document class name, description and whether the document class is protected or not. This also includes each document class property name, whether that property is required or not and whether the property is deletable or not.
Include Logged Actions	Exports all events, which user performed the event, the date the event occurred and on which virtual server the event occurred.
Include Folders	Exports all folders and their name, owner, location, all permissions including the inheritable permissions, and whether logging and/or versioning is enabled for the folder.
Include Files	Exports all files and their name, owner, path, location, content type, permissions

	and whether logging and/or versioning is enabled for the file.
Include Metadata	Exports all properties along with their data including description, data type, namespace, case-sensitivity, whether the property is readable and/or writeable outside the API, whether the property is versioned and whether the property is protected or not.

6. Click the **OK** button.

Once the export completes, the source content can be found in the **Destination Folder**.

WebDAV

WebDAV is the technology that Xythos uses to support Internet-based collaboration on files. A WebDAV client is any application that also uses this technology to communicate with a WebDAV Server, e.g. Xythos. Such applications include Web Folders, Mac OS X WebDAV folder, Windows Explorer, Xythos Drive, and Microsoft Office applications.

You can use any WebDAV client to access your Xythos account. Often, these clients have a more familiar interface and because they are desktop applications, certain features such as drag-and-drop make interacting with your account easier and more user-friendly.

Windows

Enabling and Using Web Folders

Web Folders are a valuable tool for editing your files in their native applications. If using Internet Explorer and a WebDAV enabled application such as Microsoft Office, you may create a web folder and open and edit files directly from that folder. The web folder looks like a folder on your local desktop, however it actually corresponds to a folder within your account. In other words, you can leave Xythos and work directly with the tools and applications you work with everyday.

In order to run Web folders correctly, you need to have your "security cookie" set.

Set your security cookie:

Log into your account using Internet Explorer 5.0 or higher. This enables your security cookie for all Microsoft's products including IE, Windows Explorer, and MS Office. If you do not login, other applications will only be able to access files whose "Public" user access has been granted.

Create a Microsoft Web Folder when using Internet Explorer

1. From within Xythos, find the folder for which you wish to create a Web Folder and check off the checkbox directly to the left of that folder.
2. Click on the **"Web Folder"** button.
3. Your computer may be set to then automatically open that web folder. Or you can use Windows Explorer to access the new folder under "My Network Places" (Windows 2000 and XP) or "Web Folders" (Windows 98 and NT).

Create a Web Folder in Windows XP:

1. In Windows XP, click on **"Start"** and then click on **"My Network Places"**.
2. Under Network Tasks, click Add Network Place.
3. When prompted, "Where do you want to create this Network Place?", choose **"Choose Another Network Location"** and click on **"Next"**.
4. In the Add Network Place Wizard, follow the instructions to add a shortcut to a folder. The address of that folder will be "https://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder.
5. When prompted for a user name and password, type in your user name and password. Click **"OK"**.

6. Next, name your Network Place and select **"Next"**. When you have successfully added the shortcut, select **"Finish"**. An icon for your new shortcut will appear in the My Network Places folder.

Create a Web Folder in Windows 2000:

1. In Windows 2000, **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
2. Windows Explorer will open. Locate your Network Places in the left folder listing.
3. Click on **"My Network Places "** in the left folder listing.
4. Double click on **"Add Network Place"** in the right folder listing.
5. Enter the location of the folder to which you wish the folder to access.
6. The address of that folder will be "http://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder. Click **"Next"** to continue.
7. Provide your new Web folder with a name and then click **"Finish"**.

Create a Web Folder in Windows 98 or Windows NT:

1. In Windows 98 or NT, **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
2. Windows Explorer will open. Locate your Web Folders in the left folder listing.
3. Click on **"Web Folders"**.
4. Double click on the **"Add Web Folder"** icon in the right folder listing.
5. Enter the location of the folder to which you wish the Web folder to access.
6. The address of that folder will be "http://www.xythosondemand.com/ <folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder. Click **"Next"** to continue.
7. Provide your Web folder with a name and then click **"Finish"**.

You can access the folder you've just created as if it were a local folder on your machine. Save files, open files, and delete files to and from this folder through Windows Explorer or MS Office. You can also drag and drop files or cut and paste them directly into your folder.

You can also **"mount"** other users' folders if you have the correct permissions to their folders. If you do not have write permission to a folder and you attempt to drag or copy a file to it, Windows may give you a confusing error message. Thus, be sure you have the correct access rights to a folder before making it a Web Folder.

To create a Web Folder to another user's folder, simply follow the above directions replacing <folder_name> with the path to and name of that folder.

Open a file through Windows Explorer

Opening a file in your Xythos account through Windows Explorer is as easy as opening a file stored on your local hard drive.

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. Next, launch Windows Explorer. **Right-Click** on the **"My Computer"** icon and then left click on **"Explore"**.
3. Windows Explorer will open. Your Xythos Web folder should appear either under My Network Places (Windows 2000) or under Web Folders (Windows 98 and NT).
4. Click on the Xythos Web Folder in which you stored the document you wish to open. If you are logged in, the list of files within that folder will appear. If you are not logged in, enter your user id and password when prompted.
5. Finally, simply find your file and double-click to open it.

Open a file through My Network Places in Windows XP

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. In Windows XP, click on **"Start"** and then click on **"My Network Places"**.
3. An icon for your Xythos Folder should appear in the My Network Places folder. Click on the Xythos Web Folder in which you stored the document you wish to open. If you are logged into Xythos, the

list of files within that folder will appear. If you are not logged into Xythos, enter your Xythos user name and password when prompted.

4. Finally, simply find your file and double-click to open it.

Saving a file through Word 2000 (one example of a WebDAV-enabled application)

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. In order to Save a file to your Xythos account, from Word you need to click on **"File"** and then **"Save As"**.
3. In the *Save in:* dialogue box, choose **"My Network Places"** (Windows 2000 and XP) or **"Web Folders"** (Windows 98 and NT). This should bring up your Xythos Web Folder(s).
4. Finally, simply find the location where you want to save, name the file, and click **"Save"**.

Uploading Multiple Files using Windows

It is possible to upload several files to Xythos at one time using Windows. Because Web Folders share similar functionality to regular Windows folders, it is possible to upload several documents to Xythos using the Windows *Copy* function.

1. If you have not created any Web Folders through Windows Explorer, you will need to create them before going forward.
2. Next launch Windows Explorer or My Documents (Windows XP).
3. Navigate to the files you wish to upload. Highlight those files by clicking on them once and using the Ctrl button to highlight multiple files.
4. **Right-Click** on the highlighted files and choose **"Copy"**.
5. Next, navigate to your Xythos Web Folder under **"My Network Places"** (Windows 2000 and XP) or "Web Folders" (Windows 98 and NT). This should bring up your Xythos Web Folder(s).
6. Click on your Xythos Web Folder in the left folder listing so that the contents of the folder appear in the right folder listing.
7. **Right-Click** anywhere in the right folder listing or simply **Right-Click** the Xythos Web Folder in the left folder listing. Choose **"Paste"**.
8. If you are already logged into Xythos, the files you copied will transfer to Xythos. If you are not logged into Xythos, enter your user name and password when prompted. Your files will then appear in your Xythos Web Folder.

Mac

To create a Xythos Folder in Mac OS:

1. In Mac OS, choose Go from the main Finder menu and Connect to Server... from the Go sub-menu.
2. Under Connect to Server, add your folder's address.

The address of that folder will be "https://www.xythosondemand.com/ ", replacing with the folder path of the folder for which you are creating this Xythos folder.

3. Click Connect.
4. Under WebDAV File System Authentication, type in your user name and password. Click OK.
5. For future use, go to your Recent Folders where your folder will appear for continued access.