

Manage your Files and Folders via the Web View

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Manage your Files and Folders via the Web View



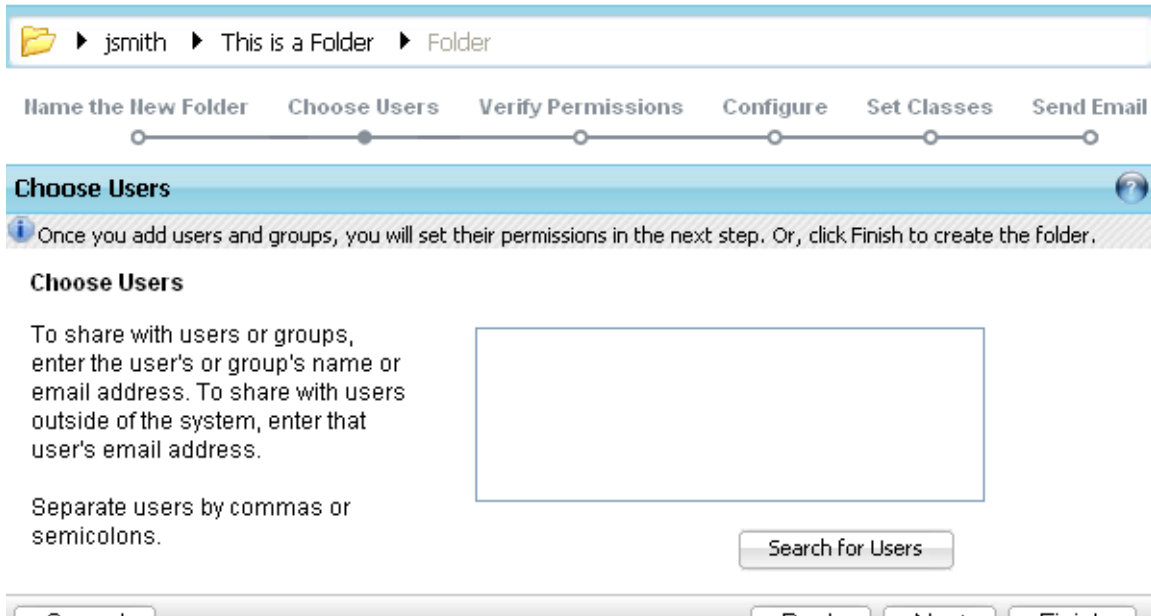
New Folder Wizard

The **New Folder Wizard** guides you through creating, sharing, emailing and configuring your new folder. 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 web interface for the New Folder Wizard. At the top, the Xythos logo is displayed. Below it, a breadcrumb path shows 'jsmith' and 'This is a Folder'. A progress bar indicates the current step is 'Name the New Folder', with other steps being 'Choose Users', 'Verify Permissions', 'Configure', 'Set Classes', and 'Send Email'. The main content area is titled 'Name the New Folder' and contains an information icon and a message: 'If you wish to simply create a folder, name the folder and click **Finish**. If you wish to change the default sharing of this folder, click **Next**.' Below this message is a text input field labeled 'Folder Name:'. At the bottom of the wizard, there are three buttons: 'Cancel', 'Next', and 'Finish'.

(Figure 2.0.0)

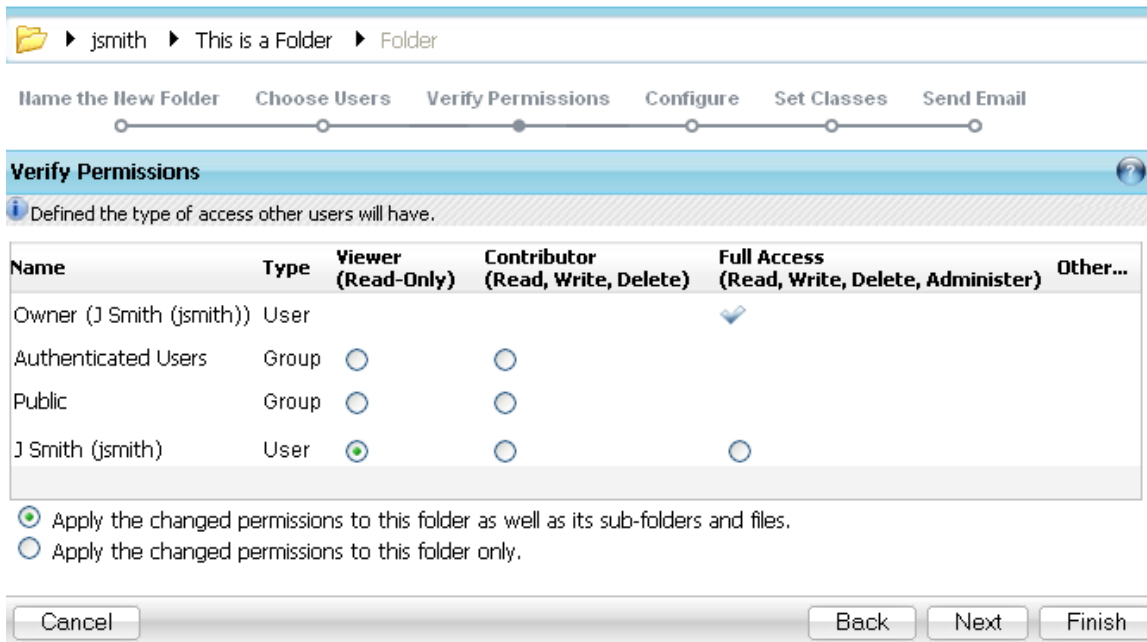
1. Within the **Document Manager** click the **New Folder**  button.
2. You are now in the **New Folder Wizard**.
3. Enter a name for the folder in the **Folder Name** field.
4. *Optional: Click **Finish** to exit the Wizard.*
5. Click **Next**.



(Figure 2.0.1)

Choose Users

1. Choose users with whom you would like to share the contents of the new folder.
2. Either begin typing in the user information in the box provided, or use the find utility by clicking on the **Search for Users** button.
3. All users and/or groups you have selected will appear in the box.
4. *Optional: Click **Next** (while leaving the fields blank) to skip the Choose Users portion of the Wizard, or click **Finish** to exit the Wizard.*
5. Click **Next**.



(Figure 2.0.2)

Verify Permissions

1. Select your preferred sharing options.
2. You may select the following options: Viewer, Contributor, or Full Access.
3. 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.
4. *Optional:* Click **Finish** to exit the Wizard.
5. Click **Next**.

jsmith > This is a Folder > Folder

Name the New Folder Choose Users Verify Permissions **Configure** Set Classes Send Email

Configure

You may define the default settings for this folder now. Or, you may choose to configure these options once the folder is created on the folder's *Manage* page.

For all new files added to this folder, store file versions by saving a separate copy each time the file is edited. (*Default Versioning*)

For all new files added to this folder, maintain a history of how the content has been accessed. (*Default Logging*)

Set storage quota size: (Unlimited) MB

Set a subscription. Send me an email when

this folder or any of its files are edited

this folder or any of its files are viewed

a comment is added to this folder or any of its files


Send these notifications when the event happens

Cancel Back Next Finish


(Figure 2.0.3)


Configure

1. You will now be brought to the **Configure** screen.
2. Select your preferred configuration options:
 - a. Versioning
 - b. Logging
 - c. Storage Quota
 - d. Subscriptions
3. *Optional:* Click **Back** to return to the previous step, or click **Next** to skip the Configuration portion of the wizard, or click **Finish** to exit the Wizard.
4. Click **Next**.

 ▶ jsmith ▶ This is a Folder ▶ Folder


Name the New Folder Choose Users Verify Permissions Configure Set Classes Send Email

Send Email 

 You may edit the text surrounding the table of files only. File links will be added once the email is sent.

Send the below email when I click Finish

Mary Snow (msnow@xythos.com) ✕ Henry Jenkins (hjenkins@xythos.com) ✕
 To: (all the members of) admin group ✕ Tony Crow (tcrow@xythos.com) ✕
 Subject: J Smith has shared some resources to you



The following has been shared to you.

File	Subscribe to and/or Bookmarks
Your list of files will be added to this table once you send this email.	

Thank you,
J Smith

Also send the email to me (J Smith)

(Figure 2.0.5)

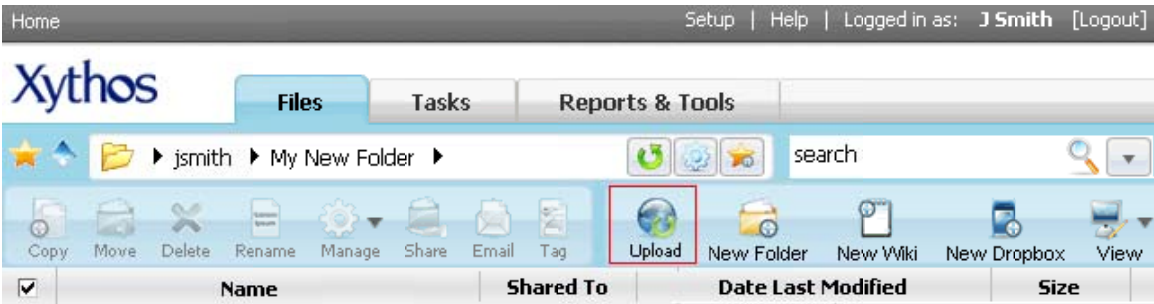
Send Email

1. You will now be brought to the **Email** screen.
2. Create an email to notify users of the new folder and or share.
3. *Optional:* Click **Back** to return to the previous step.
4. Click **Finish** to exit the Wizard. Be aware that if you do not uncheck the **Send the below email when I click Finish** option, the email shall be sent to all users listed.

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.

**Note: Advanced Upload mode requires version 1.5 or higher of the Java plug-in available from 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.*



(Figure 2.0.6)



Basic Upload



jsmith >

Upload File in: /jsmith


i 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.

Add File

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

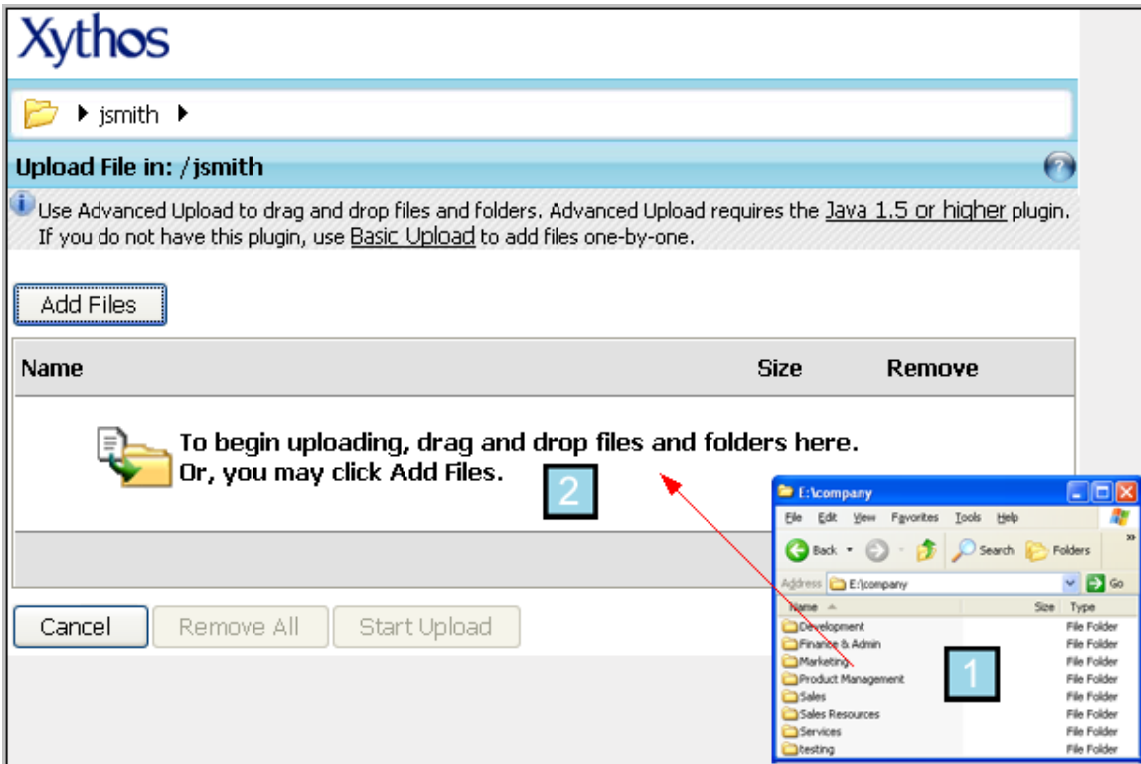
Overwrite file if it already exists.

(Figure 2.0.7)


1. Navigate to the folder to which you wish to upload files.
2. Click the **Upload**  button.
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**.



Advanced Upload



(Figure 2.0.8)

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 and 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.

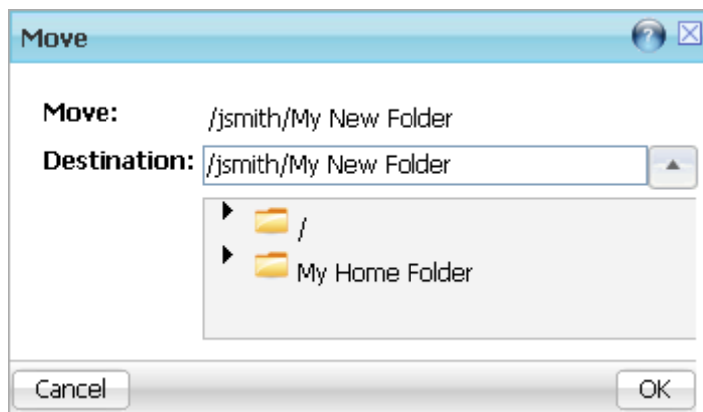


Renaming a File or Folder

1. Navigate to the file or folder you would like to rename.
2. **Right-click** on the file or folder and select the **Rename** option.
3. Enter in the name you would like in the **Rename** field.
4. Click **Ok** to complete the Rename, or click **Cancel** if you would not like to rename the file or folder.

Moving a File or Folder

When moving a file or folder you have two options for determining the destination location. Sharing and permissions of the original files or folders carry over to the moved files or folders. If you would not like the moved file or folder to be shared any longer, you must explicitly remove access.




(Figure 2.0.9)



Move a single file or folder

1. Navigate to the file or folder you would like to move.
 2. **Right-click** on the file or folder and select the **Move** option.
 3. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.
- OR-


Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to move the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly. This does not require you to manually enter any information.

*Note: Using the default destination location will result in the following error message: "You cannot move or rename a file to itself, or a folder to a sub-folder of itself".



Move multiple files or folders

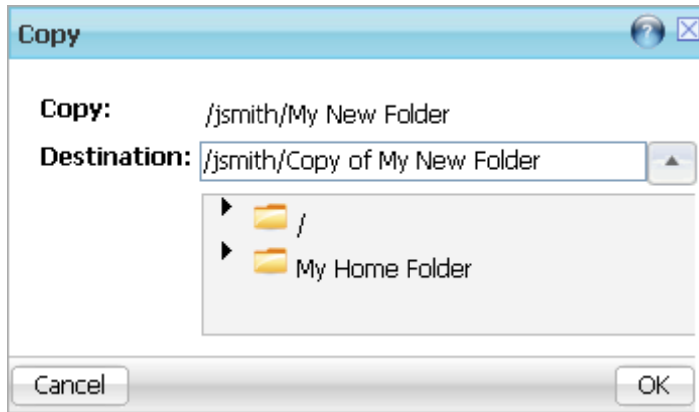
1. Navigate to the files or folders you would like to move.
 2. Place a checkmark in the box associated to the files and or folders that you wish to move.
 3. **Right-click** on any of the selected files or folders and select the **Move** option.
 4. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.
- OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to move the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly. This does not require you to manually enter any information.

*Note: Using the default destination location will result in the following error message: "You cannot move or rename a file to itself, or a folder to a sub-folder of itself".

Copying a File or Folder

When copying a file or folder you have three options for determining the destination location. Sharing and permissions of the original files or folders do not carry over to the new copy. If you would like the copy of the file or folder to be shared, you must explicitly grant access.




(Figure 2.1.0)



Copy a single file or folder

1. Navigate to the file or folder you would like to copy.
 2. **Right-click** on the file or folder and select the **Copy** option.
 3. Use the default location and name that have already been supplied. This will be the name of the original file or folder with the words "Copy of" preceding the original name. Using this method will copy the file or folder to the same level in the folder structure as the original file or folder.
 4. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.
- OR-


Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to place the copy of the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly.

5. Once you have selected a destination location using one of the above methods, click **Ok** to complete the Copy. Click **Cancel** if you would not like to copy the file or folder.



Copy multiple files or folders

1. Navigate to the files or folders you would like to copy.
 2. Place a checkmark in the box associated to the files and or folders that you wish to copy.
 3. **Right-click** on any of the selected files or folders and select the **Copy** option.
 4. Use the default location and name that have already been supplied. This will be the name of the original file or folder with the words "Copy of" preceding the original name. Using this method will copy the file or folder to the same level in the folder structure as the original file or folder.
 5. Manually enter in the location and name of the file or folder. If the name of the folder does not exist, or you do not have permission to that folder you will receive an error message.
- OR-

Using the **Expand**  icon you may navigate through your folder structure to determine where you would like to place the copy of the file or folder. As you navigate through the folders, the information in the **Destination** field will change accordingly.

Deleting a File



Delete a single file or folder

1. Navigate to the file or folder you would like to delete.
2. **Right-click** on the file or folder and select the **Delete** option.





Delete multiple files or folders

1. Navigate to the files or folders you would like to delete.
2. Place a checkmark in the box associated to the files and or folders that you wish to delete.
3. **Right-click** on any of the selected files or folders and select the **Delete** option.

When you choose to delete files, the files are not immediately deleted, but are instead moved into your Trash. If a file is accidentally sent to the **Trash**, it may be restored by visiting the trash folder. Files in your Trash count against your total available storage in your account. If you are approaching your maximum storage amount, select items to permanently delete from your **Trash** in order to free up storage.




Permanently delete all files or folders within your Trash

1. Double click the **Trash**  icon located in your home folder.
2. To delete the entire contents of **Trash**, click the **Empty Trash**  button.
3. Confirm that you wish to permanently delete all items in your Trash by clicking **Ok** or click **Cancel** if you do not wish to empty Trash at this time.



Restore a deleted file or folder which exists in your Trash


Files may be restored to their original location, as long as the location still exists and you have access. If the file or folder is not able to be restored to the original location, you will be prompted to provide a new location. If restoring a folder and all of its contents, restore the folder first. Restored files will keep their permissions and other attributes.

1. Double click the **Trash**  icon located in your home folder.
2. All previously "deleted" items will be displayed. Put a check in the box associated to the file or folder that you wish to restore.
3. Click the **Restore** button.



Retrieve an overwritten file which exists in your Trash

Overwritten files are placed in a special sub-folder of the trash named *Overwritten Files*. Overwritten files are automatically versioned. You may not restore an overwritten file, however you may retrieve a version just as you would with any other versioned file.

1. Double click the **Trash**  icon located in your home folder.
2. Double click the **Overwritten Files** folder.
3. All previously "overwritten" items will be displayed. Put a check in the box associated to the version of the file or folder that you wish to retrieve.

4. **Right-Click** on the file you wish to retrieve, and select **Manage -> Versioning**.
5. You may retrieve a version the same way you would any other versioned file.



Save to Zip File

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

Copy Link Location

1. Navigate to the file or folder you would like to copy the link location.
2. **Right-click** on the file or folder and select the **Copy Link Location** option.



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.



Open (File) in Browser

1. Navigate to the file you would like to open.
2. **Right-click** on the file and select the **Open in Browser** option.
3. The file will then be launched using your default web browser.

Open (Folder)

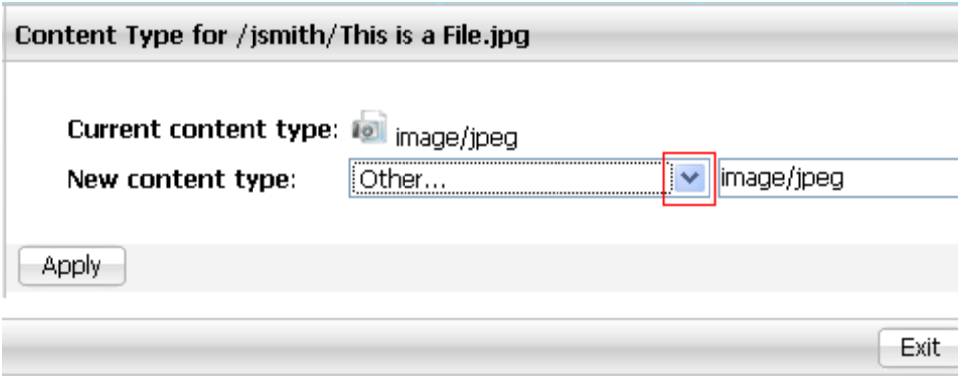
1. Navigate to the folder you would like to open.
2. **Right-click** on the folder and select the **Open** option.
3. The contents of the folder will be opened/displayed.

Content Type

Depending on the method used for uploading a file to your account, your file may be displaying as the wrong file mime-type. If there was a problem with the file or the client used to upload the file did not properly recognize the file's mime-type, it may be necessary to manually change your file's type.

Change the Content Type of a file














1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to change the content type.
3. **Right-Click** the file's name and select **Manage -> Content Type**.
4. You may select from the list provided, or you may manually enter the new file type by choosing **Other** from the type drop-down list.



(Figure 2.1.1)

5. Click the **Apply** button to view applied changes, or click the **Exit** button to save the changes and exit the Document Manager screen.

Xythos can properly display the following file icons:

File Icon	Type	Type Code
	Adobe Acrobat/PDF	application/pdf
	Audio	audio/*
	Excel Spreadsheet	application/vnd.ms-excel
	Executable/Application	application/octet-stream
	HTM/HTML	text/html
	Image	image/*
	Java/Javascript	application/x-javascript
	Powerpoint Presentation	application/vnd.ms-powerpoint
	Text Document	text/plain
	Video/Movie	video/*
	Word Document	application/msword
	XML	text/xml
	Zipped File	application/*zip*

(Figure 2.1.2)

Manage Summary

The **Manage Summary** screen provides, at a glance, the properties of the file or folder you are currently viewing. From this screen you may click the links available from the left navigation in order to modify the file or folder properties. The toolbar buttons in the Manage Summary screen are expanded upon in order to allow you to effectively manage your files. You will have different options depending on your permissions, whether it is a file or folder, and which modules your administrator has installed.

Manage Summary for a File

The screenshot shows the Xythos web interface. At the top, there is a navigation bar with 'Home', 'Setup', 'Help', and 'Logged in as: J Smith [Logout]'. Below this is the Xythos logo. The main content area shows a file browser view for 'jsmith' with the file 'This is a File.jpg'. A toolbar contains various actions: Save to Desktop, Open, Copy, Move, Delete, Rename, Save to Zip File, Email, Start Workflow, Bookmark, RSS, and Overwrite. The 'Manage' section is active, displaying a 'Summary for /jsmith/This is a File.jpg'. On the left, a navigation menu lists: Summary (selected), Permissions, Tickets, Logging, Versioning, Class Properties, Retention, Tags, Active Workflows, Workflow History, Subscriptions, Lock Details, Comments, and Content Type. The main summary area displays the following details:

Owner:	J Smith (jsmith)
Full URL:	http://serverxythoswfs/jsmith/This is a File.jpg
Intellink URL:	http://serverxythoswfs/webview/_xy-3241_1
Created by:	J Smith (jsmith)
Created on:	6/27/08 2:38:40 PM PDT
Last Modified by:	J Smith (jsmith)
Date Last Modified:	7/3/08 1:14:55 PM PDT
Size:	33.8KB (34,521 bytes)

Classified as:	This is a Document Class
Retention Rule:	Unassigned
Expires:	Unassigned
Permanent:	No

Permissions:	None
Tickets:	None
Logging:	Off
Versioning:	Off
Classified as:	This is a Document Class
Tags:	None
Active Workflows:	None
Subscriptions:	None
Lock Status:	Not locked
Comments:	None
Content Type:	image/jpeg

An 'Exit' button is located at the bottom right of the summary area.

(Figure 2.1.3)

Manage Summary for a Folder

Home Setup | Help | Logged in as: J Smith [Logout]

Xythos

jsmith > This is a Folder >

Copy Move Delete Rename Save to Zip File Email Start Workflow Bookmark RSS

Manage Summary for /jsmith/This is a Folder

>> Summary	Owner: J Smith (jsmith)
Permissions	Full URL: http://server/xythoswfs/jsmith/This is a Folder
Tickets	Intellilink URL: http://server/xythoswfs/webview/_xy-3239_1
Default Logging	Created by: J Smith (jsmith)
Default Versioning	Created on: 6/27/08 1:27:27 PM PDT
Allowable Classes	Last Modified by: J Smith (jsmith)
Class Properties	Date Last Modified: 7/3/08 1:09:26 PM PDT
Active Workflows	Size: 58.8KB (60,183 bytes)
Workflow History	Available Space: 19.7MB (20,634,025 bytes)
Workflow Template	Storage Quota: None
Subscriptions	<hr/>
Lock Details	Sharing: Some
Comments	Tickets: None
Storage Quota	Default Logging: Off
	Default Versioning: Off
	Allowable Classes: None
	Active Workflows: None
	Subscriptions: None
	Lock Status: Not locked
	Comments: None

Exit

(Figure 2.1.4)