

Xythos User Help

Version 7.1

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Xythos Help

Welcome to Xythos Help. Each topic links to a full description of the feature and includes step-by-step instructions. For a PDF of this user help, visit [Xythos User Help](#).

Your Xythos Support team is committed to delivering world-class support services to all Xythos customers and partners. If you have specific questions not covered in the provided Help documents, or you would like to learn more about our products please contact Xythos directly.

Contact Xythos Technical Support:

- Phone (U.S.): 1-866-7XYTHOS (1-866-799-8467), option 2
Phone (International): 415-248-3800 option 2
- Email: support@xythos.com
- Hours: M-F 8:30am - 5:00pm (Pacific)
- Website: <http://support.xythos.com>

What's New?

The release of Xythos 7.1 focuses on continuing to evolve the user's experience and adding innovative new features such as the dropbox and trash functionality.

Dropbox

The purpose of a dropbox is to allow a user to add content without the ability to modify or remove the content once it has been added. There are two types of dropbox users -- the submitter and the administrator.

- **Administrator:** A dropbox administrator is a user which has either created the dropbox, or has been added as a dropbox administrator to an existing dropbox. This user has the ability to view, modify and delete any content located within the dropbox. The administrator may also close or open the dropbox to submissions. Visit [Dropbox Administration](#) for more information.
- **Submitter:** A dropbox submitter is a user which has been added to the dropbox by the dropbox administrator. This user has the ability to add any content from either their local computer or from their existing account. The submitter may view any content they have added to the dropbox, however they may not modify or delete the content. There may be multiple submitters for each dropbox, however the submitters will only see their own files. Visit [Using the Dropbox](#) for more information.

Trash and Restoration

Restoring a file which has been deleted is now easier than ever. When a file is deleted, it is sent to the Trash. If you would like to restore this file, simply navigate to your trash folder, right-click on the item and select the restore option. Once a file is restored, the following information is also restored:

- Owner/Permissions information
- Classification properties (if enabled)
- Document Class (if enabled)
- Versioning
- Logging
- Subscriptions
- Workflow Template

For more information on trash, visit [Trash](#).

If you have a file which has been overwritten, there is now a new sub-folder named **Overwritten Files** in the trash folder. This folder not only lets you retrieve an overwritten file, but you may also select which version of the file you want to

retrieve. Any overwritten file is automatically sent to this special sub-folder and receives versioning information. For more information about versioning, visit [Versioning](#).

Items in the trash folder are automatically deleted based on settings by your Xythos Administrator, which includes items in the Overwritten Files folder.

Client Email Integration

Xythos 7.1 now grants you the ability to select either the Xythos Web-based Email Solution or your default email client. Selecting the "Xythos Web-based Email Solution" will use the email screens within the web view. Selecting "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending emails. This option is available in the "My Settings" tab. For more information regarding selecting the email solution of your choice, visit [My Settings](#). This option is available at the Xythos Administrator's discretion.

Wizards

The existing "New Folder Wizard" has been improved to more intuitively guide the user through creating a new folder. The "Email Wizard" has been enhanced to include the type of user you will be emailing. This new enhancement will prompt you through the appropriate steps based on the user type(s). The "Sharing Wizard" has been intelligently redesigned with additional features and the ability to tell the wizard the type of user with whom you will be sharing. Classification has received a new "Classification Wizard" to assist in easily classifying files and folders. Wizards will now prompt you to determine the type of user you will be emailing. Depending on your selection, the user will be guided to a new login screen, or they may continue on as a visitor.

Classification

Classification has been improved with the release of version 7.1. In previous versions you were only able to apply classification properties to files; you now have the ability to apply classification properties to files, folders and sub-folders. Just as with previous versions, you may select allowable classes for a specific folder and any files uploaded to the folder. The functionality has been expanded to include the ability to provide classification properties on the actual folder itself if you so desire.

Retention values are still file specific and may not be set on the folder or sub-folder. Retention has been removed from the classification management screens and now has it's own screen for easier navigation.

Classification navigation and assignment have been simplified. You may now navigate to the class properties and retention settings for a file through the right-

click menu and the manage button. You may now navigate to the allowable classes and class properties for a folder or sub-folder through the right-click menu and the manage button.

Within the manage screens, you will be guided through classification by using the Classification Wizard. When using the New Folder Wizard, you now have the additional option to assign the allowable classes to a folder.

Folder View Settings

The functionality of the "View" button in the web view has been modified. For more information about the view button, visit [Folder View Settings](#). The "View" button now has a drop-down menu which offers the following choices:

- If you have administrator access on a folder, you may set the default folder view for all users. This view is folder specific, not user specific. For example, you can set the default view for the folder "/Public" to show the columns for "Name", "Size", "Tags". When a user logs into their account and visits this folder, they will, by default see only the columns "Name", "Size", "Tags".
- If a default view has been set by a user who has administrator access for that folder, a user may modify the setting for so long as they remain on that screen. As a user, you may use the "View" button's drop-down menu and select the options for the folder you are viewing. Once you navigate away from the folder, the settings will be reset to the default view created by the administrator.
- With administrative access on a folder, you may reset any set view.

Setting the Toolbar Buttons

The functionality of the "View" button no longer offers the option to select your toolbar buttons. You may now view and modify your toolbar button settings within your "My Settings" screen and visiting the "Toolbar Buttons" link.

Improved Wikis

The Wiki feature has improved functionality with the addition of the inserting a panel within an existing panel option. When creating a wiki, you may create a new text panel, then add either a search results panel, or an upload panel. Similar to adding a link, or an image to your panel there are two new buttons for inserting panels within the text panel editor.

When creating a wiki, you now have the option of selecting an existing wiki template. The wiki templates are created by fellow users and are in an administrator designated location by default. You may, of course, use any of your

own personal existing wikis as a template. All content from the wiki template will be available, so you do not have to retype any data. You may create your own wiki template by saving your wiki to the designated wiki template location. For more information about wikis, visit [the wiki help](#).

"My Settings" screens

The "My Settings" screen has been divided up into four separate screens, "User Information", "Password", "Email Settings", and "Toolbar Buttons". Username, Display Name, Time Zone, Date/Time Style and Storage Quota are available in the "User Information" screen. Passwords may be modified from within the "Password" screen. The "Email Settings" screen provides the options to set the email address, and the method for mailing others. The "Toolbar Buttons" screen allows for individual selection of toolbar buttons visible in the Document Manager. Visit [My Settings](#) for more information.

These are just a few of the highlighted navigation and user experience improvements to the latest installment of Xythos.

Getting Started

The Xythos web view has been logically sectioned off to help you easily navigate throughout your account. The web view consists of the following:

- The **Main Menu**: located at the top of the screen provides a link to your Home folder, Account Options, and Help.
- The **Main Tabs (Secondary Menu)**: Provides navigation links to various account and file management functions, and is located beneath the Main Menu.
- The **Navigation Toolbar**: Contains bookmarks and saved searches, the breadcrumb trail, and file navigation options, and is located beneath the Main Tabs.
- The **Toolbar Buttons**: Contains all buttons appropriate to the screen you are currently viewing, and those you have selected from within your **My Settings** screen, and is located beneath the Navigation Toolbar.
- The **Document Manager Grid**: Contains all of the contents of the current folder with information pertaining to each item, and is located beneath the Toolbar Buttons.

Main Menu

The main menu provides account options and assistance in using Xythos. Within the main menu are links to: the **Home, Setup, Quick Start, Help, Logout.**

- **Home**
Clicking on the Home link will return you to your home folder.
- **Records Manager**
Clicking on the Records Manager link will return you to your records management home folder.
- **Setup**
Clicking the Setup link will bring you to your account management functions, such as:
 - My Settings
 - My Contacts
 - Workflow Templates (if enabled)
 - Roles
 - Classification (if enabled)
 - Records Management (if enabled)

- **Help**
Clicking the Help link will display all available help topics.
- **Logout**
Clicking the Logout link will log your account out of the current Xythos session.

Upon logging into your account, you will always first see your home folder's contents listed. From here, you can work directly with the files listed or navigate to other folders using a number of navigation tools.

Main Tabs (Secondary Menu)

The main tabs provide additional options which are relevant to the current main menu item you are viewing.

The Navigation Toolbar

The navigation toolbar displays your current working folder as well as the folders above it. For example, if you are in the */home/Organization/Users/jsmith/plant/flower/orchid* folder, your navigation toolbar will show as follows:

› **home** › **Organization** › **Users** › **jsmith** › **plant** › **flower** › **orchid**

Clicking on the black arrow to the left of the folder name will display all sub-folders for that particular folder. If, for example, you were to click on the arrow to the left of *flower*, you would see a drop-down menu which contains a link to *orchid* and any other sub-folders beneath the *flower* folder.























Clicking on the folder name itself will navigate you instantly to that folder. If, for example, you were to click on the folder name *jsmith*, you would be brought to that folder as long as you have the appropriate access.





Search

Searches allow you to search for files within your Xythos account. You may search for files you own as well as files which are not owned by you but for which you have access permission. There are three types of searches: Quick Search, Search and Advanced Search. Quick searches are based on the file name and file contents only, Search includes expanded options and Advanced Searches can be conducted based on multiple file criteria. You may both save and edit searches.

Toolbar Buttons

The most commonly used toolbar buttons are listed, by default, in the Document Manager. In order to modify the current toolbar buttons, click on the **Setup** link, click on the **My Settings** tab, and then click on the **Toolbar Buttons** link. You may select up to twelve toolbar buttons. For more information, visit [My Settings](#).

	Bookmarks and Saved Searches: View your existing bookmarks and Searches.		Quick Search: Perform a quick search of your files and folders.
	Copy: Create a copy of the file or folder.		Refresh: Update the current view/return to Home.
	Create Bookmark: Add a Bookmark for quick reference.		Rename: Modify the name of the file or folder.
	Delete: Move the file or folder to Trash.		RSS: Create and Receive an RSS feed.
	Email: Send an email notification once a resource has been shared.		**Save to Desktop: View or Save the file.
	Expand: Expand allows for additional options.		Save to Zip File: Copy files or folders to your local computer.
	Manage: View and edit the file or folder's configuration.		Share: Share with other users.
	Move: Modify the location of the file or folder.		Subscribe: Notification of changes via e-mail.
	New Dropbox: Create a new dropbox.		Tag: Create keywords.
	New Folder: Create a new folder.		Trash: Empty the Trash.
	New Wiki: Create a new Wiki.		Up: Navigate one folder above the current folder.

	**Open: View the file.		Upload: Using either basic or advanced upload, add files and folders.
	**Overwrite: Overwrite the existing file.		View: Modify the current folder view setting.

**Only visible when working within the Manage screen.

Document Manager Grid and Footer

The Document Manager Grid shows the contents of the current folder with information pertaining to each item. You may modify the columns displayed in the Document Manager Grid. By default, Xyθος displays the **Name, Share status, Lock status, Date of last modification, and Size** of each item. However, by clicking on the **View** button, and then clicking on the **Add/Remove Columns** tab, you may display alternate information for each file and folder. For detailed information on adding and removing columns, and setting the default folder view, visit [Folder View Settings](#).

You may also resize and rearrange columns. Move a column by clicking the column header and dragging the column into a new position. Resize a column by mousing over the columns border and dragging left or right.

Sorting Your Files and Folders

The order of your file and folders may be sorted according to name, owner, creation date, created by user, size, last modification date, last modification user, content type, classification (if enabled), Records Management (if enabled), etc. In other words, any available column may be used for sorting.

By clicking on the title of each of these columns, files and folders will automatically sort in ascending order, grouping folders separately from files.

To sort in descending order, click the column title again. The "up" arrow indicates that the contents are sorted in ascending order while the "down" arrow indicates descending order.

The Right-Click Menu

Each file and folder has a **Right-Click** menu featuring the following actions:

<u>File</u>	<u>Folder</u>
Open in Xythos Drive	Open
Save to Desktop	Manage: Summary, Permissions, Tickets, Default Logging, Default Versioning, Allowable Classes, Class Properties, Active Workflows, Workflow History, Workflow Template, Subscriptions, Lock Details, Comments, Storage Quota.
Open in Browser	Share
Manage: Summary, Permissions, Tickets, Logging, Versioning, Class Properties, Retention, Tags, Active Workflows, Workflow History, Subscriptions, Lock Details, Comments, Content Type.	Email
Share	Copy Link Location
Email	Copy
Copy Link Location	Move
Copy	Delete
Move	Rename
Delete	Save to Zip File
Rename	Bookmark
Save to Zip File	Subscribe
Bookmark	Create RSS Feed
Subscribe	Start Workflow
Create RSS Feed	
Tag	
Start Workflow	

Wiki and Dropboxes

There is a special file type extension for wikis and dropboxes, which is called "xapp". This file type extension will not only launch the wiki or dropbox, but it is also treated as a folder in that you may browse the contents. Though you have the ability to browse the contents and make modifications, it is not recommended. When using a wiki or a dropbox, permissions and other changes should be performed directly within the wiki or dropbox. If it is necessary to make changes outside of the wiki or dropbox, you may reach the manage page for this type of file by selecting the **Advanced** option from the Right-click menu. The advanced option is only available to the xapp file type. If permissions are changed from within the xapp manage screen, it can cause difficulties and may

be resolved by launching the wiki or dropbox and resetting permissions from within the wiki or dropbox.

Size Information

The footer of the Document Manager Grid features the total number of items in the folder listing and the current folder's quota and size information.

- **Item count** - The total number of files and folders within the current folder.
- **Total Size** - The sum of the size of all files and the size of all sub-folders, including each sub-folder's contents.
- **Quota** - The maximum amount of information that can be saved in the current folder.
- **Available** - The difference between the total size and the quota, i.e. how much space remains available for you to use for saving files and folders within the current folder.
- **None** - The current folder does not have a Quota set and is instead inheriting the parent folder's Quota setting.

For more advanced instruction on managing your files and folders, continue through the help. Should you have general how-to questions and are unsure of which category to explore, try the [F.A.Q.](#) section.

F.A.Q.s

Xythos Help: Frequently Asked Questions

- [How do I add a new file to my account?](#)
- [How do I edit a file that's already in my account?](#)
- [How do I let someone else edit my file?](#)
- [I am able to navigate around my account, but I get an error when I try to download a file. Why can't I read my files anymore?](#)
- [I can't find a file but I know I've uploaded it to my account before, how can I find it?](#)
- [How do I link to someone else's folder?](#)
- [Is there a way for me to find out every time someone edits a certain file?](#)
- [What is the difference between Permissions and Inherit Permissions?](#)
- [How can I change permissions across multiple folders and files?](#)

How do I add a new file to my account?

You can add a new file to your account by clicking the **Upload** button.

Basic Upload

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

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.

How do I edit a file that's already in my account?

If you are using the Xythos interface in conjunction with the [Xythos Drive**](#) and the file is an Office or text file, you should be able to open the file by clicking on the file's name, edit it, and save. However, if you are not using the Xythos interface with the Xythos Drive, you must open the file, save it locally, and then proceed with your edits. For more information about opening and editing your files, see [File Management](#).

How do I let someone else edit my file?

In order for someone else to edit your file, they must have write permission on that file. There are several ways in which someone else can be granted write permission on your file. The appropriate method to use for granting such permission depends on what type of user that other person is.

- If the person you wish to edit your file is another Xythos user, you may grant specific write permission to that person through the file's Sharing permissions. For step-by-step instructions, see [Sharing Files](#).
- If the person you wish to edit your file is not a Xythos user, you may issue that person a write-permission ticket for the specific file. For step-by-step instructions, see [Tickets](#).

I am able to navigate around my account, but I get an error when I try to download a file. Why can't I read my files anymore?

If you cannot read one of your own files, you, or another user, may have exceeded the bandwidth quota for your folder. Your bandwidth quota applies to uploads to and downloads from your account for ALL users accessing files under your home folder. You will not be able to upload or download files until your bandwidth quota is no longer at its limit. Once the time over which your bandwidth quota applies has lapsed, you will be able to access your files again.

I can't find a file but I know I've uploaded it to my account before, how can I find it?

You can find a file using either the Quick Search or the Search/Advanced Search. Quick Search offers you the possibility of searching for a file based on its name and/or contents only for the current folder. The Search and Advanced Search options offer you the possibility of searching for a file based on its name, contents and any of its properties across all folders. For more information, see [Quick Search](#) and [Advanced Search](#).

How do I link to someone else's folder?

If someone else grants you read access to their folder, you may create a direct link to that folder using your Bookmarks. A Bookmark is defined as a shortcut to your folder or another user's folder for which you have permission to access. To create a bookmark, see [Bookmarks](#).

Is there a way for me to find out every time someone edits a certain file?

If your administrator has turned this feature on, you can be notified when a file has been edited by using Subscriptions. Subscriptions give users the ability to request to be notified via email when files or folders, to which that user has read access, are viewed or changed. To set up a new subscription, see [Creating Subscriptions](#).

What is the difference between Permissions and Inherit Permissions?

Regular permissions apply specifically to the folder itself. Regular permissions define who has what access to the folder and optionally, the current contents of the folder. Inheritable permissions are the permissions that you grant to a contact on all additional folders created within that folder and all files uploaded in the future to that folder. Generally, you can think of Inheritable Permissions as a set of permission rules for future folders and files.

For more information, completely read through [Inherit Permissions](#).

How can I change permissions across multiple folders and files?

Overwrite Permissions takes the permission set of a folder and makes that the permission set for all files and sub-folders within the respective folder. If you do not choose Overwrite Permissions and instead change a single permission on a folder, only that specific change will be applied across all sub-folders and files, given that you choose the "Apply the changed permissions to this folder as well as its sub-folders and files." option of course.

For example, if you look at a folder and it has Public with no checked permissions and Users with Accounts have Read permissions and you simply take away Read access by unchecking that permission on the Permissions page for User with Accounts, you may not be accomplishing what you want. There may be a file within that folder that has Read for Public. You may think because the folder has no access permissions defined for Public, the files must also. But you can only ensure that all files within that folder have both no Public and no Users with Accounts permission by first taking away the Read permissions for Users with Account permission on the particular folder and then choosing Overwrite Permissions so that the entire permission set is applied to sub-folders and files.

For more information, completely read through [Overwrite Permissions](#).

** The Xythos Drive is the compliment product for the Xythos WebFile Server and Document Manager providing full WebDAV functionality for non-WebDAV enabled Windows applications. For more information about the Xythos Drive, visit www.xythos.com.

Setup and Account Management

My Settings

Your Settings are your general, personal settings and information which apply to your user account.

Change one of your Settings

1. Click on the **Setup** link.
2. Click on the **My Setting** tab.
3. Change the appropriate setting by clicking the link to either "User Information", "Password", "Email Settings", or "Toolbar Buttons", and make modifications according to the guidelines below
4. To complete the change, click the **Apply** button.

User Information

When the system has not been setup to use your LDAP user account and password for authentication, your settings options will be as follows:

Option	Description
Username	Your username is how you log into Xythos. This and your password make up the authentication required to access your account. Users may also search for you by your username. You may not modify this information, please contact your Administrator if a change is necessary.
Display Name	Your Display Name is used when displaying who created, last modified, and owns files and folders. Display Names are also used to display and search for contacts.
Time Zone	Your Time Zone is used when displaying the date when a file or folder was created and last modified.
Date/Time Style	Your Date/Time style determines how dates and times are displayed throughout your account. Choices range from displaying the date only in a 6 digit format to displaying the weekday, long-form date, time, and time zone.
Storage Quota	Your storage quota is the maximum amount of space in megabytes allotted to your account in order to house files and folders. Once you reach your Storage Quota limit, you will no longer be able to upload files unless you free space by deleting other files and emptying the trash can. Items which have been sent to the trash will be automatically

	deleted based on your Administrator's settings. Please check with your administrator. You may or may not be able to change your Storage Quota based upon how the system you are using has been configured. This decision is left to the System Administrator. This option will only be available if your administrator has enabled it.
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Password

Option	Description
Password	Your Password is only used when logging in. When changing your password, it must be at least 6 characters long. If choosing to change your password, you will be required to enter your old password for security purposes. You will also be required to enter your new password twice to avoid the possibility of typographical errors. Should you forget your password, there is currently no method for retrieving your password. You must contact your system administrator or support staff in order to have your password reset.

Email Settings

This section contains your email settings, which are used throughout the system.

Option	Description
Email Address	This is the email address which will receive all notifications for your account, is used when searching for users, and for all email functionality throughout the system. Be certain to verify your email address as there is not an option to test the address.
Method for Sending Email	This option 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.
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Records Management Email Integration Settings

This section will only appear if you have access to Records Management. Records Management allows you to make records out of email messages. In order to pull messages in from your email account, you must configure your Records Management Email settings correctly.

Option	Description
Email Server	This is the name of your email account server. If you use MS Exchange, the format should be exchange.company_name.com. For other mail servers, enter the name of the Incoming mail server. If you do not know the name of your mail server, contact your system administrator.
Email Server Account Address	This is the account name for your email account.
Email Server Account Password	This is the password for your email account. This is NOT your web view password.
Email Server Folder for Candidate Records	This is the folder within your email account that holds the email messages you wish to turn into records. Once you refresh your Email screen by clicking on your Email bookmark and then clicking the Refresh button, all email messages from this folder will appear in the system. From there, you can make the message a record.

You may select the checkbox **Always delete email from server after it is made into a record**. This will remove all email from the folder designated for records once the email has been put into Xythos as a record.

Toolbar Buttons

This section determines which buttons will appear, by default, in your toolbar.

Option	Description
Copy	The copy button allows you to create a copy of a file or a

	folder, or several files and folders.
Move	The move button allows you to move a file or a folder, or several files and folders.
Delete	The delete button allows you to delete a file or a folder, or several files and folders at once.
Rename	The rename button allows you to provide a new name for a file or a folder.
Manage	The manage button allows you to quickly jump to a management screen for a file or a folder.
Share	The share button immediately navigates you to the sharing options for a file or a folder.
Email	The email button launches an email screen, enabling you to quickly generate an email regarding a specific file or folder.
Tag	The tag button allows you to tag a single file, or multiple files at once. Tags are used when searching for files.
Save to Zip File	The save to zip file button allows you to select multiple items and download them in a compressed format.
Bookmark	The bookmark button allows you to quickly bookmark a selected item.
Subscribe	The subscribe button allows you to quickly subscribe to a selected item.
RSS	The rss button will create an rss feed for the selected file.

Your LDAP Settings

When the system has been set up in such a way that you are logging in with your LDAP user account and password, there are certain settings that are read-only and certain settings that will not be displayed at all. These settings are maintained on your LDAP server and therefore, you cannot edit them through Xythos.

Option	Description
Display Name*	Your Display Name is used when displaying who created, last modified, and owns files and folders. Display Names are also used to display and search for contacts.
Email	Your Email is the address your administrators may use to

	contact you. This email address is unrelated to the file and folder Email URL button and email functionality throughout the system.
Language	Your Language is the language used to display all generic text displayed throughout the Web UI. Your Language does not apply to file and folder names.
Time Zone	Your Time Zone is used when displaying the date when a file or folder was created and last modified.
Date/Time Style	Your Date/Time style determines how dates and times are displayed throughout your account. Choices range from displaying the date only in a 6 digit format to displaying the weekday, long-form date, time, and time zone.
Password**	Your Password is only used when logging in. When changing your password, it must be at least 6 characters long. If choosing to change your password, you will be required to enter your old password for security purposes. You will also be required to enter your new password twice to avoid the possibility of typographical errors. Should you forget your password, there is currently no method for retrieving your password. You must contact your system administrator or support staff in order to have your password reset.

*When logging in with your LDAP user account, this setting will be read-only.

**When logging in with your LDAP user account, this setting will be not be displayed.

My Contacts

Contacts

You may also create lists of contacts by creating a group. To learn more about groups, refer to [Groups](#). It is also possible to share files using "Public", "Users with Accounts", and "tickets". However, these concepts are discussed in [Sharing](#), and [Tickets](#), respectively.

Add a new Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Click the **New Contact** button.
4. Using the [Find](#) utility, you may locate a user by Name or Email from within your Organization.
5. Enter in the search criteria, and then click **Find**. If you would like all users in your organization listed, leave the "Find User" field blank.
6. All users matching your search criteria will be listed. Highlight the user you would like to add as a contact, and then click **Ok**.

Later you may specify the files and folders this user may access, via [Sharing](#).

Delete a Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Place a checkmark in the box which corresponds to the Contact(s) you wish to delete.
4. Click the **Delete** button. The Contact is immediately and permanently deleted.

Groups

You may sometimes wish to make your files available to a customized *Group* of users rather than to individual users or to the entire "Public". Groups are a convenient way for you to organize groups of users that need to access the same files.

By granting the Group permission to access a file or folder, you allow every user in that group to access it.

Add a new Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click the **Groups** tab.
4. Click the **New Group** button.
5. Provide a **Name** for the Group, and then click **Next**.
6. Use the **Find** feature to locate users.
7. Select the users you wish to add, and click the **Add Selected Users** button. Repeat this process for each of the users you wish to add.
8. Click the **Save** button when you have completed configuring your **Group**.

Add or remove users to an existing Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click on the **Groups** tab.
4. Place a checkmark in the box associated to the group you wish to modify, and then click the **Edit** button.
5. Place a checkmark in the box associated to the user(s) you wish to remove from the group, and then Click the **Delete** button. Click the **Add Member** button if you wish to add additional users to the group.
6. Click the **Exit** button when you have completed configuring your **Group**.

Delete an existing Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click on the **Groups** tab.
4. Place a checkmark in the box associated to the group(s) you wish to delete, and then click the **Delete** button. The Group is permanently deleted immediately.

Roles

A role represents a set of abilities and the users that have been granted those abilities. Only users belonging to the role will be able to perform the set of abilities defined for that specific role. An ability defines the specific functionality that can be performed, e.g. *Create Dropboxes*. Only those users who have been assigned a role with the ability *Create Dropboxes* will be able to create a dropbox within the system.

Some roles have been created through the admin pages. However, a subset of roles may be available through the Web View to be deleted and/or edited. You may only edit roles if your username has access to the edit roles ability.

When creating a new role, you may choose from the list of abilities to grant to that role. The abilities determine what areas of functionality are available to the set of assigned users.

Roles, however, do not replace permissions. You are required to have the correct permissions in order to access the items on which the role-based functionality can be performed. In other words, referring to the example above, it would not be enough for the user to have the *Create Dropbox* ability in order to create a new dropbox within a specific folder. You would have to have the required ability in addition to read/write access on the folder. This example can be further explained using the below table:

User	Has <i>Create Dropbox</i> ability	Access Defined on Folder	Can the user create a dropbox in the folder?
User A	Yes	Read	No
User B	Yes	Read/Write	Yes
User C	No	Read/Write	No

Creating, editing, and deleting roles require the current user already have the **Manage Roles** ability as granted by the admin.

Create a new role

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Click on the **New Role** button.
4. Define a **name** and optionally a **description**.
5. Click **Next**.

6. Use the **>** and **<** buttons to move the abilities between columns. Moving it from **Available Abilities** to **Assigned Abilities** adds the ability to the current role. The reverse order removes the ability from the role.
7. Click **Next**.
8. To assign users or groups to this role, use the [Find](#) utility.
9. Click the **Add Selected Users** button. Repeat this step to assign more users or groups to this role.
10. Click the **Save** button.

Edit an existing role

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the role you wish to edit, and then click the **Edit** button.
4. You may edit any of the options within the Edit Role screen by using the available links:
 - o Name & Description
 - o Abilities
 - o Members
5. Click the **Exit** button when all changes are complete.

Delete an existing role

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the Role in which you wish to delete, and then click the **Delete** button.

Edit Roles

Name & Description

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the Role you wish to modify.
4. Click on the **Edit** button.
5. Click on the **Name & Description** link.
6. Modify the **name** and optionally create or modify the **description**.
7. Click the **Apply** button to continue working, or click the **exit** button.

Abilities

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the Role you wish to modify.
4. Click on the **Edit** button.
5. Click on the **Abilities** link.
6. Use the **>** and **<** buttons to move the abilities between columns. Moving it from **Available Abilities** to **Assigned Abilities** adds the ability to the current role. The reverse order removes the ability from the role.
7. Click the **Apply** button to continue working, or click the **exit** button.

Members

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Place a checkmark in the box associated to the Role you wish to modify.
4. Click on the **Edit** button.
5. Click on the **Members** link.
6. Place a checkmark in the box or boxes associated to the user(s) and or group(s) you wish to delete, and then click the **Delete** button. If you would rather add users, then click the **Add Member** button.
7. Click the **exit** button when you have finished adding and removing members.

Managing your Files and Folders

Document Manager

The document manager consists of:

- The Navigation Toolbar
- Buttons
- The Document Manager Grid and footer

The Navigation Toolbar

The navigation toolbar displays your current working folder as well as the folders above it. For example, if you are in the */home/Organization/Users/jsmith/plant/flower/orchid* folder, your navigation toolbar will show as follows:

› **home** › **Organization** › **Users** › **jsmith** › **plant** › **flower** › **orchid**

Clicking on the black arrow to the left of the folder name will display all sub-folders for that particular folder. If, for example, you were to click on the arrow to the left of *flower*, you would see a drop-down menu which contains a link to *orchid* and any other sub-folders beneath the *flower* folder.



























Clicking on the folder name itself will navigate you instantly to that folder. If, for example, you were to click on the folder name *jsmith*, you would be brought to that folder as long as you have the appropriate access.

Search

Searches allow you to search for files within your Xythos account. You may search for files you own as well as files which are not owned by you but for which you have access permission. There are three types of searches: Quick Search, Search and Advanced Search. Quick searches are based on the file name and file contents only, Search includes expanded options and Advanced Searches can be conducted based on multiple file criteria. You may both save and edit searches.

Toolbar Buttons

The most commonly used toolbar buttons are listed, by default, in the Document Manager. In order to modify the current toolbar buttons, click on the **Setup** link, and then click on the **My Settings** tab, and then click on the **Toolbar Buttons** link. You may select up to twelve toolbar buttons. For more information, visit [My Settings](#).

	Bookmarks and Saved Searches: View your existing bookmarks and Searches.		Quick Search: Perform a quick search of your files and folders.
	Copy: Create a copy of the file or folder.		Refresh: Update the current view/return to Home.
	Create Bookmark: Add a Bookmark for quick reference.		Rename: Modify the name of the file or folder.
	Delete: Move the file or folder to Trash.		RSS: Create and Receive an RSS feed.
	Email: Send an email notification once a resource has been shared.		**Save to Desktop: View or Save the file.
	Expand: Expand allows for additional options.		Save to Zip File: Copy files or folders to your local computer.
	Manage: View and edit the file or folder's configuration.		Share: Share with other users.
	Move: Modify the location of the file or folder.		Subscribe: Notification of changes via e-mail.
	New Dropbox: Create a new dropbox.		Tag: Create keywords.
	New Folder: Create a new folder.		Trash: Empty the Trash.
	New Wiki: Create a new Wiki.		Up: Navigate one folder above the current folder.
	**Open: View the file.		Upload: Using either basic or advanced upload, add files and folders.
	**Overwrite: Overwrite the existing file.		View: Modify the current folder view

			setting.
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**Only visible when working within the Manage screen.

Document Manager Grid and Footer

The Document Manager Grid shows the contents of the current folder with information pertaining to each item. You may modify the columns displayed in the Document Manager Grid. By default, Xythos displays the **Name, Share status, Lock status, Date of last modification, and Size** of each item. However, by clicking on the **View** button, and then clicking on the **Add/Remove Columns** tab, you may display alternate information for each file and folder. For detailed information on adding and removing columns, and setting the default folder view, visit [Folder View Settings](#).

You may also resize and rearrange columns. Move a column by clicking the column header and dragging the column into a new position. Resize a column by mousing over the columns border and dragging left or right.

Sorting Your Files and Folders

The order of your file and folders may be sorted according to name, owner, creation date, created by user, size, last modification date, last modification user, content type, classification (if enabled), Records Management (if enabled), etc. In other words, any available column may be used for sorting.

By clicking on the title of each of these columns, files and folders will automatically sort in ascending order, grouping folders separately from files.

To sort in descending order, click the column title again. The "up" arrow indicates that the contents are sorted in ascending order while the "down" arrow indicates descending order.

The Right-Click Menu

Each file and folder has a **Right-Click** menu featuring the following actions:

<u>File</u>	<u>Folder</u>
Open in Xythos Drive	Open
Save to Desktop	Manage: Summary, Permissions, Tickets, Default Logging, Default Versioning, Allowable Classes, Class Properties, Active Workflows, Workflow History, Workflow Template, Subscriptions, Lock Details, Comments,
Open in Browser	
Manage: Summary, Permissions, Tickets, Logging, Versioning, Class	

Properties, Retention, Tags, Active Workflows, Workflow History, Subscriptions, Lock Details, Comments, Content Type.	Storage Quota.
Share	Share
Email	Email
Copy Link Location	Copy Link Location
Copy	Copy
Move	Move
Delete	Delete
Rename	Rename
Save to Zip File	Save to Zip File
Bookmark	Bookmark
Subscribe	Subscribe
Create RSS Feed	Create RSS Feed
Tag	Start Workflow
Start Workflow	

Wiki and Dropboxes

There is a special file type extension for wikis and dropboxes, which is called "xapp". This file type extension will not only launch the wiki or dropbox, but it is also treated as a folder in that you may browse the contents. Though you have the ability to browse the contents and make modifications, it is not recommended. When using a wiki or a dropbox, permissions and other changes should be performed directly within the wiki or dropbox. If it is necessary to make changes outside of the wiki or dropbox, you may reach the manage page for this type of file by selecting the **Advanced** option from the Right-click menu. The advanced option is only available to the xapp file type. If permissions are changed from within the xapp manage screen, it can cause difficulties and may be resolved by launching the wiki or dropbox and resetting permissions from within the wiki or dropbox.

Size Information

The footer of the Document Manager Grid features the total number of items in the folder listing and the current folder's quota and size information.

- **Item count** - The total number of files and folders within the current folder.

Xythos User Help

- **Total Size** - The sum of the size of all files and the size of all sub-folders, including each sub-folder's contents.
- **Quota** - The maximum amount of information that can be saved in the current folder.
- **Available** - The difference between the total size and the quota, i.e. how much space remains available for you to use for saving files and folders within the current folder.
- **None** - The current folder does not have a Quota set and is instead inheriting the parent folder's Quota setting.

Folder View Settings

The view option allows the owner of a folder or sub-folder to set the way the folder or sub-folder appears to all users. As the owner, you may select the visible columns, the order of those columns, and the sorting order of each column. Depending on your ownership of the folder and/or your role in the system, you may see different options.

Folder View Options

- **Add/Remove Columns:** Add or remove columns to the current folder view. You may select from either standard properties or document classes. This option is available to all users, as long as they have access to view the folder. This setting is not saved, and only applies to the current viewing of the folder. When you navigate away from the folder, and then return, the columns will be returned to their original state.
- **Use Current Folder Settings As My Default:** The current folder view settings will be applied to all new and existing folders and sub-folders owned by this user, with the exception of folders which have custom folder view settings. This option is available to all users, as long as they have access to view the folder. When browsing someone else's folders and sub-folders, selecting this option will change your own default folder view settings.

For example, user "jsmith" logs in and she navigates to her "devnull" folder. The user "jsmith" selects the "Use Current Folder Settings As My Default" option. All folders (without a custom view setting) currently owned by "jsmith" will now match the "devnull" folder settings (the columns listed, the column placement, and sort order). All new folders and sub-folders created by user "jsmith" will also match the settings of the "devnull" folder.

If user "gfish" navigates to the folder "devnull", which is owned by "jsmith", the folder view will be whatever "jsmith" set them to be.

- **Save Layout Changes for this Folder:** The changes made will be specific to this folder or sub-folder. This will not cascade down to sub-folders, nor will it apply to other folders owned by this user. This is also referred to as creating a custom folder view setting.

Selecting this option after adding/removing columns, moving around the order of the columns, and the sort order of a folder will save these changes to this folder only. This option is only available to the owner of this folder, or any user with administrative permissions to this folder. The changes will be seen by any visitor to this folder.

- **Reset Current Folder Settings to User's Default:** If this folder or sub-folder has a custom folder view setting, selecting this option will return the current folder or sub-folder to the owner's default folder view settings. If an administrator has modified, and then saved changes to the folder view, this option will set the folder view to whatever the owner's current default folder settings are. This option is only available to the owner of this folder, or any user with administrative permissions to this folder.


For example, the user "jsmith" had their default folder settings configured to show the "name", "date modified", and "size" columns when the folder "devnull" was created. An administrator visits the "devnull" folder and saves layout changes to the folder. The user "jsmith" has since changed their default folder settings to show the "name", "tags", and "size" columns. Once the administrator selects the option to reset the folder "devnull" to the user's default folder settings, the folder will now have the columns "name", "tags", and "size".

Adding/Removing Columns

1. Navigate to the **Document Manager**.
2. Click on the **View** button.
3. Select the **Add/Remove Columns** option.
4. Select standard properties or a document class from the drop-down menu.
5. Add columns by selecting from the available columns, and then use the arrow buttons to move them to the current columns list. Remove columns by selecting from the current columns, and then use the arrow buttons to move them to the available columns list
6. Click **Ok**.

Folder Navigation

There are several tools which allow you to navigate folders within the system.

One of the buttons available is the  **Up** button. **Up** allows you to navigate one folder above the current folder. This option is only active if you have **read** access to the folder above the current folder.

The **Document Manager** lists the contents of the current working folder. The navigation bar displays your current working folder as well as the folders above it. For example, if you are in the */home/Organization/Users/jsmith/plant/flower/orchid* folder, your navigation bar will show as follows:

› **home** › **Organization** › **Users** › **jsmith** › **plant** › **flower** › **orchid**

Clicking on the black arrow to the left of the folder name will display all folders on the same level for that particular folder. If, for example, you were to click on the arrow to the left of *flower*, you would see a drop-down menu which contains a link to *flower* and all other sub-folders of the *plant* folder.

Clicking on the folder name itself will navigate you instantly to that folder. If, for example, you were to click on the folder name *jsmith*, you would be brought to that folder as long as you have the appropriate access.

Finally, you may use your bookmarks to *jump* to your more frequently accessed folders. For more information about using bookmarks, refer to [Bookmarks](#).

File Management

Although there are several file management options available from the **Document Manager**, (sharing, move, rename, etc.), the File Management page is the central location for a single file's management options.

If you would like to manipulate several files together, do so from the **Document Manager**, or by using the various options available from the **Right-Click** menu. To work with a particular file, you should start from the file's **Summary** page.

View a File's Summary Page

1. Navigate to the file you wish to work with.
2. **Right-Click** the file's name and select **Manage**.

File Management Options

Within the Manage screen there are several sharing and tracking options. You can use the sharing and tracking options to keep track of how, when, and what was done to the file over time. You may also use these options to share your files with other users as well as with other people who are not users in the system. To find out more about the individual sharing and tracking options, refer to the specific Help sections:

[Summary](#)

[Permissions](#)

[Tickets](#)

[Logging](#)

[Versioning](#)

[Class Properties](#)

[Retention](#)

[Tags](#)

[Active Workflows](#)

[Workflow History](#)

[Subscriptions](#)

[Lock Details](#)

[Comments](#)

[Content Type](#)

Summary

The Summary section includes all of the "static" properties which are not editable by you and only change through the system.














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

Uploading Files

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 plugin available from www.java.com. If you have the Java plugin 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 plugin, use Basic Upload.*

Basic Upload

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

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.

If you have chosen to upload a folder, it will be uploaded into your current working folder. For example, if you are currently in the "Sports/" folder in your Document Manager screen, and then click the **Upload** button, and choose to upload your "Baseball" folder; it will appear as follows: "Sports/Baseball/".

You may click **Stop Upload** at any time during the upload. Those files that were successfully uploaded before you stopped the upload will remain in your account.

Overwriting Files

When using the Upload feature, you may be prompted to overwrite an existing file with the new file. This method of overwriting is prompted when a matching file name is found. An alternate method of overwriting files can be used by visiting the Manage screen.

Within the file's **Manage** screen there is an **Overwrite** button. When selecting this option, you may replace the existing file with any other file of your choosing, no matter the name of the file. For example: You have a file named "Cat.jpg", which is a picture of a cat. Using the **Overwrite** button, you browse to a file on your local system named "Dog.jpg", which is a picture of a dog. Using the option to **Start Upload** you will now have a file named "Cat.jpg" that is a picture of a Dog. The file name is not changed from "Cat.jpg" to "Dog.jpg", only the contents are effected.

Overwrite a File

1. Within the File's Manage screen, click the **Overwrite** button.
2. Click the **Browse** button to locate the file on your local computer that you wish to upload over the existing file.

**Note: The file name does not have to match, however the extensions must be the same. If you attempt to overwrite a file with a non-matching extension type, you will not receive a notice. The overwritten file will appear in your trash.*

3. Click **Start Upload**
4. You will be returned to your Document Manager, where you can view the new contents of your file.

No matter which method of overwriting you select, the overwritten file will be placed in a special **Overwritten Files** sub-folder within the trash folder. Each file which is placed in this special folder will have versioning enabled. This allows you to return to a previous version of the file should it be necessary. For more information, visit [Versioning](#). Emptying the trash will also empty this overwritten files sub-folder.

Folder Management

Create folders in order to better manage and keep track of your uploaded files. Folders have their own settings which help to manage the files located within them.

Create a Folder

1. Navigate to the parent folder in which you would like to create a new sub-folder.
2. Click the **New Folder** button.
3. Provide a name for the folder.
4. Click **Finish** to create the folder, or click **Next** to [Choose Users](#), [Verify Permissions](#) for the folder, [Configure](#), [Classify](#), or [Email](#).

Although there are several folder management options available from the Document Manager screen (sharing, move, email, etc.), the Folder Summary/Manage screen is the central location for a single folder's management options.

If you would like to manipulate several folders together, do so from the Document Manager, using the various buttons available and the Right-Click menu. To work with a particular folder, you should start from the folder's Summary/Manage page.

View a Folder's Summary/Manage Page

1. Navigate to the folder you wish to work with.
2. On the **Document Manager** screen place a check mark in the box associated to the folder, and then click the **Manage** button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected folder, and then click the **Manage** option.

Configuration Options

Within the Manage menu there are several options. These options are used to manage and track the selected folder, sub-folder and associated files. You may also use these options to share your folders/files with other users as well as with other people who are not users in the system. To find out more about the available options, refer to the specific Help section of that option:

Summary
[Permissions](#)
[Tickets](#)

[Default Logging](#)
[Default Versioning](#)
[Allowable Classes](#)
[Class Properties](#)
[Active Workflows](#)
[Workflow History](#)
[Workflow Template](#)
[Subscriptions](#)
[Lock Details](#)
[Comments](#)
[Storage Quota](#)

Summary

The Summary section includes all of the "static" properties which are not editable by you and only change through the system.

All folders in a Xythos system can have storage quotas applied and enforced. If granted permission to change the storage quota of a folder, you regulate how much information can be added to that folder. When an action is attempted which would cause a quota to be exceeded, the action is aborted and an error message is returned.

Change a folder's Storage Quota

1. Navigate to the folder for which you wish to change quota.
2. **Right-Click** the folder, and then select **Manage -> Storage Quota**.
3. Determine the amount of space (in MB) you would like to grant this folder. It must be less than or equal to the amount of space granted in your home folder.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save the changes and exit the Quota screen.

**Note: This label will only appear as a link if you have permission to change the quota of this folder. This permission can only be granted by your system administrator.*

New Folder Wizard

The **New Folder Wizard** guides you through creating, sharing, configuring, and emailing your new folder. You may follow each step of this wizard, skip through to the desired step or end the wizard at any time.

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**.

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**.

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**.

Configure

1. You will now be brought to the **Configure** screen. For more information on Configuration, visit [Configure](#).
2. Select your preferred configuration options:
 - Versioning
 - Logging
 - Storage Quota
 - 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**.

Set Classes (This option is only available if Classification is enabled)

1. Select your allowable document class(es) for this folder. For more information, visit [Classification](#).
2. *Optional: Click **Back** to return to the previous step, or leave the settings blank and click Next, or you may click **Finish** to exit the Wizard..*
3. Click the **Next**

Send Email

1. You will be brought to the **Email** screen. For more information on Email, visit [Email](#).
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.

New Folder Configuration

When creating a new folder, you may choose to define certain default settings. You can define these settings during the creation of a new folder, or within the folder's Manage page once it has been created. The available settings include:

- *Default Versioning* - If Default Versioning is on for a folder, versioning is enabled for every new file uploaded to that folder. For more about file versioning, refer to [Default Versioning](#).
- *Default Logging* - If Default Logging is on for a folder, logging is enabled for every new file uploaded to that folder. For more about default logging, refer to [Default Logging](#).
- **Storage Quota Size (in MB)** - All folders in your account can have a storage quota applied and enforced. If granted permission to change the storage quota of a folder, you regulate how much information can be added to that folder. When an action is attempted which would cause a quota to be exceeded, the action is aborted and an error message is returned.
- **Subscriptions** - Subscribing to a folder allows you to receive e-mail notifications when the following actions are performed on folders:
 - Any edits of the folder or its files
 - Any time the folder or its files are viewed
 - If any comments are added to the folder or its files

After selecting subscription items, you may also choose the frequency in which the emails are sent. For more information about subscriptions, refer to [Subscriptions](#).

Copy, Move and Rename Files and Folders

Copy Files and Folders

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. A copied file is treated the same as a new file, therefore it inherits all settings from the folder to which it has been copied.

1. Navigate to the file or folder you wish to copy.
2. **Right-Click** on the file or folder and select the **Copy** option.
3. When copying a file or folder you have three options for determining the destination location.
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.

-OR-

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 three methods, click **Ok** to complete the Copy. Click **Cancel** if you would not like to copy the file or folder.

Move Files and Folders

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 shared, you must explicitly remove access. The file or folder will also inherit permissions from the new parent folder as applicable.

1. Navigate to the file or folder you wish 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.
4. 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.

**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.".*

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

Rename Files and Folders

1. Navigate to the file or folder you wish 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.

Trash and Restoration

When you choose to delete files, the files are not immediately deleted, but are instead moved into your Trash. The Trash is only visible once a file has been deleted. There are two types of deleted files:

- Files deleted through the right-click menu, or the delete button.
- Files overwritten in the upload screen, or the manage screen.

Files which are deleted are sent to the trash. If a file is accidentally sent to the **Trash**, it may be restored.

Files which are overwritten are sent to a special sub-folder within the trash named **Overwritten Files**. Each file which is placed in this special sub-folder will have versioning enabled. This allows you to return to a previous version of the file should it be necessary. For more information, visit [Versioning](#). Emptying the trash will also empty this overwritten files sub-folder. A file with versioning enabled will be sent to the normal trash folder if deleted, it will not be sent to the overwritten files sub-folder.

Items which have been sent to the trash will be automatically deleted after 30 days. 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.

The trash screen display columns with the deletion information "Deleted By", "Deleted On", and "Deleted From". You may restore a file/folder if you are the user who deleted it, if you are the original owner, if you are the trash owner, or if you have delete permission on the file/folder being restored. When the file is sent to the trash, all users with read, write, delete and administer permissions will now have view only permissions. When restoring a file/folder, the following information is also restored:

- Owner/Permissions information
- Classification properties
- Document Class
- Versioning
- Logging
- Subscriptions
- Workflow Template

Restore a Deleted File or Folder

1. Double click the **Trash** icon located in your home folder.
2. **Right-click** on the file or folder you wish to restore.
3. Select the **Restore** option.
4. The file or folder will be restored to the original location. If the original location no longer exists, or you no longer have access to the location, you will be prompted to provide a new restore location for the file or folder.

Retrieve an Overwritten File

1. Double click the **Trash** icon located in your home folder.
2. Double click on the **Overwritten Files** sub-folder.
3. **Right-click** on the file you wish to restore.
4. Select the **Manage -> Versioning** option.
5. Visit [Versioning](#) for more information on restoring file versions.

Permanently delete all files and 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. This will also delete the contents of your **Overwritten Files** folder.
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.

Sharing and Permissions

Sharing Wizard

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

1. Within the **Document Manager** put a checkmark in the box associated to the file or folder you would like to share.
2. Click the **Share** button, or right click on the file or folder and select the **Share** option.
3. You are now in the **Sharing Wizard**.

Add Users

1. Add users with whom you would like to share the file or 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. Click **Next**

Share

1. Select your preferred sharing options.
2. You may select the following options: Viewer, Contributor, or Full Access.
3. If you are sharing a folder, 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 **Back** to return to the previous step, or click **Next** to skip the Share portion of the wizard, or click **Finish** to exit the Wizard.*
5. Click **Next**.

Email

1. You will be brought to the **Email** screen. For more information on Email, visit [Email](#).
2. Create an email to notify users of the new share.
3. *Optional: Click **Back** to return to the previous step, or 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.*
4. Click **Finish**.

Sharing Your Files and Folders

Xythos allows you to share your files and folders with other users. Sharing your files makes it possible for multiple users to both view and edit your files without requiring you to maintain multiple copies of the shared files.

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

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

When sharing a file or folder, you will be using either the **Sharing** screen, or the **Permissions** screen. The **Sharing** screen allows you to quickly provide access as either a contributor to the file or folder, or as a viewer of the file or folder. The **Permissions** screen allows you to provide detailed access such as Read, Write, Delete, and Administer access. You may either use these options separately or in conjunction to provide a customized level of access.

Sharing

- **Viewers** - Viewers have read-only access to your file or folder. Viewers cannot modify the properties or content of files and folders. (Under Permissions, **Viewers** have "read" access on a file; and "read" and "inherit read" on a folder. Visit [Inherit Permissions](#) for more information.)
- **Contributors** - Contributors can modify files and add content to folders. (Under Permissions, **Contributors** have "read", "write" and "delete" access on a file; and "read", "write", "delete" (optional), "inherit read", "inherit write", and "inherit delete" access on a folder. Visit [Inherit Permissions](#) for more information.)
- **Full Access** - Full Access users can modify files and add content to folders. (Under Permissions, **Full Access** users have "read", "write", "delete", and "administer" access on a file; and "read", "write", "delete" (optional), "inherit read", "inherit write", "inherit delete", and "inherit administer" access on a folder. Visit [Inherit Permissions](#) for more information.)
- **Other** - Users with "Other" access do not fit within the specified viewer, contributor or full access definitions. This type of access is typically

granted to a user whom owns the parent folder of the folder/file you are sharing. You cannot grant or remove this access from within the Sharing Wizard, however, users with this access will be listed.


Add Viewers or Contributors

1. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Share** button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Share** option.
2. You will then be brought to the [Sharing Wizard](#), which will guide you through the process of sharing files and folders.

Refer to [Email](#) to learn more about informing other users that you have shared files and/or folders with them.


For more information about detailed access rights, refer to [Permissions](#).


The Find Utility


Xythos provides you with an intuitive and powerful utility for locating users and groups. Initiate a quick find by simply typing in the **Find** field provided, or use the  **Expand** icon to modify your criteria.

The typical **Find** screen looks as follows:

Find User or Group:




Search: 

where: 

Quick Find

1. Type in the partial display name, email address or group name.
2. Click **Find**

Expanded Find

1. Click the  **Expand** icon.
2. From within the **Search** drop-down menu, select one of the following options: **Users and groups, users, groups.**
3. From within the **Where** drop-down menu, select one of the following options: **Name or Email, Name, Email.**
4. Type in the desired information into the **Find** field based on your **Search** and **Where** options.
5. Click the **Find** button.

When using the **Find** functionality, you may enter as many or as few characters as you would like. You may also search using upper case or lower case or a combination of both, you are not restricted by case sensitivity. If you enter in the following criteria "Roc" using the quick find, you will see the following items returned:

- Rochanne Smith (rsmith@yourdomain.com)
- Robert Ocre (rocre@yourdomain.com)
- Rocketry

The Name *Rochanne Smith*, the Email address *rocre@yourdomain.com*, and the group *Rocketry* were all returned as each contains "Roc" in any of the available criteria. Using the expanded find feature will narrow down the results; in cases of large organizations or common search criteria the expanded find feature is the suggested method.

Within the various spaces of Xythos, you will notice there are more targeted versions of the **Find** Utility:

Location	View
<ul style="list-style-type: none"> • Workflow Templates (Setup) 	<p>Find Users and Groups:</p> <p>Search <input type="text" value="Users and groups"/></p> <p>from: <input type="text" value="All locations"/></p> <p>where <input type="text" value="Display Name"/></p> <p>contains <input type="text"/></p> <p><input type="button" value="OK"/></p>
<ul style="list-style-type: none"> • My Contacts (Setup) • Retention Owner (Classification Retention Rule Setup) 	<p>Find</p> <p>Find Users from: <input type="text" value="All locations"/></p> <p>whose <input type="text" value="Display Name"/></p> <p>contains <input type="text"/></p>

<ul style="list-style-type: none">• Roles (Setup)• Classification (Setup)	<p>Add User</p> <p>Choose from your contacts and groups:</p> <div data-bbox="1006 262 1266 367"><p>sdf sdf (contact list) wdwsds (contact list)</p></div> <p>OK</p> <p>or find users and/or groups:</p> <p>Search: Users and groups</p> <p>from: All locations</p> <p>where: Display Name</p> <p>contains:</p> <p>OK</p>
<ul style="list-style-type: none">• Records Management (Setup)• Records Management Tasks• Records Management Reports and Tools - Audit Reports	<p>Choose from your contacts:...</p> <div data-bbox="576 882 1128 1018"><p>sdf sdf (contact list) wdwsds (contact list)</p></div> <p>OK</p> <p>or find users...</p> <p>from: All locations</p> <p>where: Display Name</p> <p>contains:</p> <p>OK</p>

Permissions on Files

Xythos enables you to share specific files with other users. Permissions will allow you to grant specific read, write, delete and/or administer permissions on your files. Xythos allows you to share any file for which you have "Administer" permission which, by default, includes all the files you own. For a full explanation on the different types of sharing, i.e. the different permissions you can grant to users, refer to [Permissions](#).

Add permission options on a file for another user or group of users

1. **Right-Click** on the file and select **Manage -> Permissions** or click the checkbox associated to the file, and then click the **Manage** icon.
2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen file and also allows you to change the current permissions. Click the **Add User/Group** button.
4. You may choose one of your contacts or one of your groups using the Find utility, or by typing in the available box. To learn more about adding contacts, see [My Contacts](#).
5. Click **Next**.
6. Next, adjust the permissions to **On** or **Off** by checking or un-checking the respective permission box. For more information on types of permission, refer to [Permissions Overview](#).
7. Click the **Finish** button to view applied changes.
8. Click the **Exit** button to exit the Permissions screen.

Modify current sharing options on a file for another user or group of users

1. **Right-Click** on the file and select **Manage -> Permissions** or click the checkbox associated to the file, and then click the **Manage** icon.
2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen file and also allows you to change the current permissions.
4. Adjust the permissions by checking or un-checking the respective permission box. For more information on types of permission, refer to [Permissions Overview](#).
5. Click the **Apply** button to view applied changes, or click the **Exit** button to save the changes and exit the Permissions screen.

Permanently prevent a user or Group of users from sharing your file

1. **Right-Click** on the file and select **Manage -> Permissions** or click the checkbox associated to the file, and then click the **Manage** icon.

2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen file and also allows you to change the current permissions. Check off the **check box** next to each user and/or group you wish to permanently remove sharing privileges.
4. Click the **Remove Access** button.

Note: It is possible to change all permissions within the Advanced Permissions to **Off (unchecked) and keep this user in your list of sharing contacts for this file. If you wish to keep this user without allowing them access privileges, simply follow the directions for changing the way your file is shared and make all permissions "Off" (unchecked).*

Permissions on Folders

Xythos enables you to share specific folders with other users. Permissions will allow you to grant specific read, write, delete and/or administer permissions on your folders. Xythos allows you to share any folder for which you have "Administer" permission which, by default, includes all the folders you own. For a full explanation on the different types of sharing, i.e. the different permissions you can grant to users, refer to [Permissions Overview](#).

When sharing a folder, you must select a scope for applying permissions. The scope represents how permission settings will be applied to sub-folders and files within this folder. You have two choices:

- **Apply the changed permissions to this folder as well as its sub-folders and files**
Any changed permissions will be applied to this folder and any existing files and sub-folders within it.
- **Apply the changed permissions to this folder only.**
The permissions set will be applied to the current folder only. All sub-folders and files created in the future within this folder will instead be granted permissions based on this folder's [Inheritable Permissions](#).

Add users to your Permissions

1. **Right-Click** on the folder and select **Manage -> Permissions** or click the checkbox associated to the folder, and then click the **Manage** icon.
2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen folder and also allows you to change the current permissions. Click the **Add User/Group** button.
4. You may choose one of your contacts or one of your groups using the Find utility or by typing in the available box. To learn more about adding contacts, see [My Contacts](#).
5. Click **Next**. Next, adjust the permissions to **On** or **Off** by checking or unchecking the respective permission box. For more information on types of permission, refer to [Permissions Overview](#).
6. Click the **Finish** button to view applied changes.
7. Click the **Exit** button to save the changes and exit the Permissions screen.

Change your folder's permission options

This option allows for modifying a parent folder's permissions and expanding on the current permissions of the sub-folders. This will **not** remove existing

permissions from a sub-folder. For example, if a sub-folder has read and write permissions then you modify the parent folder to have delete permissions; the sub-folder will now have read, write and delete permissions.

1. **Right-Click** on the folder and select **Manage -> Permissions** or click the checkbox associated to the folder, and then click the **Manage** icon.
2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen folder and also allows you to change the current permissions.
4. Click **Next**.
5. Adjust the permissions by checking or un-checking the respective permission box. For more information on types of permission, refer to [Permissions Overview](#).
6. Click the **Apply** button to view applied changes, or click the **Exit** button to save the changes and exit the Advanced Permissions screen.

**Note: It is possible to recursively change all permissions of the sub-folders based on the changes you have made to the parent folder. For example, if a sub-folder has read, write and delete permissions whereas the folder only has delete permissions; the sub-folder's permissions will be overwritten to include only delete permissions. In order to make such modifications, refer to [Overwrite Permissions](#).*

Permanently prevent a user or user group from sharing your folder

1. **Right-Click** on the folder and select **Manage -> Permissions** or click the checkbox associated to the folder, and then click the **Manage** icon.
2. Within the **Manage** screen, click the **Permissions** link.
3. The Permissions page displays the current permissions on the chosen folder. Check off the **check box** next to each user and/or group you wish to permanently remove sharing privileges.
4. Click the **Remove Access** button.

Note: It is possible to change all permissions within the Advanced Permissions to **Off (unchecked) and keep this user in your list of sharing contacts for this folder. If you wish to keep this user without allowing them access privileges, simply follow the directions for changing the way your folder is shared and make all permissions "Off" (unchecked).*

Inheritable Permissions

You also have the option to create a set of default Permissions under [Inheritable](#)

[Permissions](#). Inheritable permissions are the permissions set on a parent folder, which are then also set recursively on all sub-folders of that parent folder. Your contact can have different Inheritable and Regular Permissions.

Permissions Overview

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

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

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

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

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

Read Permission

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

Write Permission

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

Delete Permission

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

Administer Permission

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

Basic Permissions:

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

Advanced Permissions:

1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Advanced Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Read**, **Write**, **Delete**, **Administer**, **Inherit Read**, **Inherit Write**, **Inherit Delete** or **Inherit Administer** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard. For more information about the sharing wizard, visit [Share Wizard](#).

6. Once all permissions are complete, click the **Apply** or **Exit** button.

Folder Permissions (Inheritable)

You also have the option to create a set of default Sharing Permissions under [Inheritable Folder Permissions](#). The Inheritable permissions determine the default regular permissions (as described in [File and Folder Sharing](#)) for all child folders and files of an existing folder. The Inheritable Folder Permissions are simply the *default* permissions for all new folders and uploaded files. Folders and files may have both, permissions and inheritable permissions.

Folder Permissions (Inheritable)

The folder permissions determine the default regular permissions (as described in [File and Folder Sharing](#)) for all child folders and files of an existing folder. The Inheritable Permissions are simply the *default* permissions for all new folders and uploaded files.

Upon the creation of a file or folder, the system looks to the "Inherit Read", "Inherit Write", "Inherit Delete", and "Inherit Administer" values of the parent folder to create the Read, Write, Delete, and Administer permissions for the child file or folder.

For example, you have a user *"jsmith"* who needs to have access to *"share/flower/"* however you do not want *"jsmith"* to have access to *"share/flower/rose/"*. In this case you would permit access to any combination of **Read, Write, Delete, and Administer**; you would not however, provide access to any of the *Inherit permissions*.

As an example of when to provide Inheritable Permissions, user *"jsmith"* will require access to *"share/flower/"* and all files and sub-folders within *"share/flower/"*. In this case you would permit access to any combination of **Inherit Read, Inherit Write, Inherit Delete, and Inherit Administer**.

Grant Inheritable Permissions on a folder

1. Navigate to the folder's Manage page.
2. **Right-Click** on the folder, and then select **Manage -> Permissions**.
- OR -
Click the box associated to the folder, and then click the **Manage** icon, and then select the **Permissions** link.
3. Click on the **Advanced Sharing** tab.
4. Place a checkmark in the sharing box or boxes associated to the user or group you wish to modify.
5. Adjust the inheritable permissions to "On" (checked) or "Off" (unchecked) according to how you want future files and folders permissions to be created.
6. Click the **Apply** button to view applied changes, or click the **Finish** button to save the changes and exit the Permissions screen.

Note: By selecting **Inheritable Permissions, you are not removing current access to folders, sub-folders or files; you are instead granting additional access. If you would like to override the current permissions to the folders, sub-folders, and files; click the **Overwrite Permissions** button. For more information on Overwriting Permissions, visit [Overwrite Permissions](#).*

Overwrite Folder Permissions

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

Overwrite existing Permissions

1. Navigate to the Folder you would like to change Permissions.
2. Set the folder and inherit permissions. For more information on setting permissions, visit the [Folder Permissions](#) help.
3. Click the **Overwrite Permissions** button.
4. Click the **Ok** button to confirm changes, or click **Cancel** to discard changes.

Locking Files and Folders

Locking files and folders prevents other users from editing or saving changes to a particular file for a defined period of time. You can control who is able to write to any item (file or folder) at any specific time. A lock stays locked until you, or another user with the correct access releases it, or the lock expires.

Types of Locks: Simple and Recursive

Simple locks are applied to one file or one folder; a recursive lock applies to a folder and all of its contents, including both files and sub-folders.

Create a lock on a file

1. On the **Document Manager** screen, **Right-Click** the selected file.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock** screen, select either **Locked** or **Unlocked** for Lock Status.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Create a lock on a folder

1. On the **Document Manager** screen, **Right-Click** the selected folder.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock Details** screen, select either **Folder Locked, Unlocked** for Lock Status. Do not select **Folder and Contents Locked**.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

**Note: Selecting "Folder and Contents" will create a Recursive lock.*

Create a recursive lock on a folder

Recursive locks may only be created on folders if all content within that folder is unlocked. Creating this type of lock will lock not only the folder you are currently viewing, but also all sub-folders and content located within that folder.

1. On the **Document Manager** screen, **Right-Click** the selected folder.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock Details** screen, select **Folder and Contents Locked** for Lock Status.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to exit the **Lock Details** screen.

View who has locked a file or folder

You must have write permission on a file or folder to perform the following.

1. On the **Document Manager** screen, **Right-Click** the selected file.
2. Click the **Manage -> Lock Details** option.
3. Within the **Lock Details** screen, the following information will be listed:
 - Lock Status
 - Created by
 - Lock Type
 - Expires
4. Optionally, you may modify the **Lock Status** within this screen.
5. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Remove a lock on a file or folder

You must have write permission on a file or folder to perform the following.

1. On the **Document Manager** screen, **Right-Click** the selected file.
2. Click the **Manage -> Lock Details** option.
3. Using the **Lock Status** drop-down menu, select **Unlocked** within this screen.
4. Click the **Apply** button to view applied changes, or click the **Exit** button to save and exit the **Lock Details** screen.

Identifying a Locked File or Folder

Within the **Document Manager** you have the option of viewing the **Lock** column. The **Lock** column provides the display name of the person whom has locked the file(s) or folder(s). If a **Recursive Lock** has been applied, the display name of the person placing the lock will be applied recursively as well.

If the **Lock** column is not displayed within your Document Manager, click on the **View** button in order to add the column to your current display.

Tickets

Tickets Overview

Tickets allow both non-Xythos and Xythos users access to your files and folders. By using the ticket functionality, you may allow specific access to your folders, their sub-folders, and the files within. A folder ticket can be thought of as a direct online link to a folder. The person with whom you'd like to grant access to the file or folder will receive an e-mail with the online link. When the link is clicked, the user is taken to the Xythos interface and the folder's file and sub-folder listing displays just as you would see it in its regular folder listing screen.

When granting access to files and folders through tickets, you must define the type of access or permissions the user(s) should receive. In addition to setting access/permissions for your ticket, you may also password protect the contents. When the user receives the ticket link via e-mail, they will be prompted for a password when attempting to access the link. If a user is granted *Read and Write* permission for a ticket, however they are not provided the password then they will not be able to access the contents of the ticket.

Ticket Concepts

When creating a ticket, the following changes to your account will occur. For more information, visit [Using Tickets](#).

<p>Sharing Permissions Entry</p>	<p>During the Ticket creation process, you are prompted to specify either <i>Read Only</i> or <i>Read, Write and Delete</i> access to the file(s) or folder(s). This information is stored in the file or folder's Permissions screen.</p>
<p>Password-Protection is Optional</p>	<p>When creating a ticket, you have the option of selecting password protection. If password protection is enabled, the password enabled ticket link will be sent. If password protection is enabled, there will not be a password-free link. The password is not supplied in the e-mail.</p>
<p>Ticket Expiration is Optional</p>	<p>Optionally, a ticket can have an expiration date. Once that date passes, all users who have been accessing the file or folder through the issued ticket will no longer be allowed access to that file or folder. An expired ticket will continue to exist in your account until you either delete it or change the expiration date to something in the future.</p>

For information on the steps to create a ticket, refer to [Using Tickets](#).

Using Tickets

As explained in [Tickets Overview](#), tickets allow both non-Xythos and Xythos users access to your folders. There are several ways in which tickets can be created and used.

Tickets can be created for one file or folder, or any combination of multiple files and multiple folders.

Create a ticket

During the creation of a new ticket, the file or folder's **Permissions** screen is updated with the new permissions.

1. On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Manage -> Tickets** option.
- OR -
On the **Manage** screen, select the **Tickets** link.
2. Click the **New Ticket** button.
3. A new window will appear with default ticket values. You may modify the following:
 - o Permissions
 - o Lifetime
 - o Name
 - o Password

When you are satisfied with the values, click **Ok** to create the ticket.

4. The ticket is now listed in your **Tickets** screen. You may copy and paste the URL for the ticket into your preferred e-mail client, or simply place a checkmark in the box corresponding to the ticket, and then click the **Email** button.

Default Ticket Values

If choosing to accept the default values of a ticket, your ticket has the following default properties:

Property	Default Value	Available Values
Permissions	Viewer (Read Only)	Viewer (<i>Read Only</i>) or Contributor (<i>Read, Write and Delete</i>)
Lifetime	30 days	1 minute to an unlimited time
Name	System-determined. The default name is	Any name that has not already been used for

	"Ticket For <folder_name> <file_name> <appended_number>" where <folder_name> is the folder's name, <file_name> is the file name, and <appended_number> is a generated identifier, should you create more than one ticket for this folder or file on a particular day.	another ticket
Password	none	Passwords do not have a minimum length.

What happens when I e-mail this ticket?

If you have created a ticket in the above manner and have clicked the **Email** button, an e-mail message is automatically created with the link. From here, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, he/she will be able to click on this link and see the folder listing or open the file, depending on whether the ticket was created for one or more files or one or more folders.

The user will be able to perform functions according to the permissions granted on the ticket.

What happens when I send a password-protected ticket?

If you have created a ticket in the above manner, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, that user must enter the correct password before being granted access to the folder's listing or the file.

If the user enters the correct password, the folder listing or file will be displayed. If the user enters the correct password and is logged in as a Xythos user, that user will remain logged in and their folder listing will automatically refresh with the ticketed folder listing, or the file will automatically launch.

If the wrong password is entered, a message will display on the Xythos screen informing the user of the incorrect password. This screen will remain in the browser window until the user enters the correct password. There is no limit to the number of incorrect password attempts.

E-mail an existing ticket

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Email** button.

3. Your default e-mail client will open and will include the link or passworded link to the ticket.
4. The full path and file name of the ticket will be listed, along with an intellilink which does not require a Xythos account to access.
5. Click the **Exit** button in order to exit the **Ticket** screen.

**Note: Once you have finished composing the automatically-generated e-mail message, you may e-mail the link to any non-Xythos or Xythos user. If you have sent the password-protected link, you must separately provide your e-mail recipients the correct password.*

Create/Edit a Ticket's Password

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

In order to ensure security, the password for an existing ticket will not be displayed. Follow the below directions for creating a new password or modifying the existing password.

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



Email

Using Xythos, you can send links to files, instead of sending the files themselves, which is both faster and saves unnecessarily wasted disk space. There is no need to make duplicate copies of a single file when you simply send a link to the original file. In this manner, every user is always looking at the most recent version of the file.

You have two available options when using the email feature. The first option is "Xythos Web-Based Email Solution", and the second is "My Default Email Client". You may select which email option to use in your "My Settings" screen. You will be presented with different email screens depending on your preferred email method. The sharing wizard, new folder wizard, tickets, and emails will be impacted by this setting. For more information on setting your email method, visit [My Settings](#).

Emailing with the Xythos Web-Based Email Solution

1. Navigate to the intended file or folder.
2. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Email** button.
- OR -
- On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Email** option.
3. The groups and usernames will automatically be listed within the **To** field. You will see the users and groups with whom this resource has already been shared. If you would like to email additional users, click the **To** entry box, you may start typing a user's **Display name**, their **username**, or a **Group name**.
4. Separate users/groups by commas or semicolons. Or, you may click the **To** button to [Find](#) and add *users* or *groups*.
5. You may then edit the subject and body of the notification e-mail as you wish. Note that there is a place holder for the link(s) to the file(s) and/or folder(s). Once you send the e-mail, this place holder will be replaced with the appropriate link(s).
6. Click **Send** to send the e-mail.

Visit [Inserting images and links](#) to learn about inserting  images and  links from the web and your Xythos account.

Emailing with your Default Email Client

1. Navigate to the intended file or folder.

2. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Email** button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Email** option.
3. Select the **type of user** you wish to email:
 - Only Users
 - Only Visitors
 - Both Users and Visitors
 - You will then be presented with screens specific to your selection.

Emailing Only Users

1. Follow steps 1-3 from **Emailing with your Default Email Client**
2. Users and Groups with Read Access will be listed.
3. Click on the **Add User/Group** button to add additional users/groups.
4. The [Find](#) screen will appear.
5. Once you have selected all users and groups, click on the **Send** button.
6. Your native email client will launch with an email containing links and other pertinent information. You may personalize this email, or send it without modifications.

Emailing Only Visitors

1. Follow steps 1-3 from **Emailing with your Default Email Client**
2. Click on the expand icon associated to **Ticket Options**
3. Provide a **name** for the ticket.
4. Specify the ticket **lifetime**.
5. *Optionally provide password information.*
6. Once you have configured your ticket options, click on the **Send** button. For ticket information, visit [Using Tickets](#).
7. Your native email client will launch with an email containing links and other pertinent information. You may personalize this email, or send it without modifications.

Emailing Both Users and Visitors

1. Follow steps 1-3 from **Emailing with your Default Email Client**
2. Click on the **Add User/Group** button to add additional users/groups.
3. The [Find](#) screen will appear.
4. Once you have selected all users and groups, click on the expand icon associated to **Ticket Options**
5. Provide a **name** for the ticket.

6. Specify the ticket **lifetime**.
7. *Optionally provide password information.*
8. Once you have configured your ticket options, click on the **Send** button.
9. Your native email client will launch with an email containing links and other pertinent information. You may personalize this email, or send it without modifications.


Inserting images and links

When using the email feature, you have the ability to add not only text, but also images and links.

Inserting an image from a website

1. Navigate to the [Email](#) screen.
2. Click the **Insert Image** button.
3. Click the radio button to the left of the **URL** field.
4. Type in the full location of the image. For example:
`http://www.xythos.com/picture.jpg`
5. Click **Ok**
6. You will be returned to your email, where the image has now been added directly into the body of the email.

Inserting an image from your Xythos account


1. Navigate to the [Email](#) screen.
2. Click the **Insert Image** button.
3. Click the radio button to the left of the **Select Image** field.
4. If you know the exact name and location of the image, you may type it in the **Select Image** field, otherwise click the  **Expand** icon.
5. Your folder structure will be listed and you may navigate to the image file.
6. Click the name of the file in order to select the image.
7. Click **Ok**
8. You will be returned to your email, where the image has now been added directly into the body of the email.

Inserting a link from a website

1. Navigate to the [Email](#) screen.
2. Click the **Insert Link** button.
3. *Optionally type in the link label. For example: My Website*
4. Click the radio button to the left of the **URL** field.
5. Type in the full location of the file or folder. For example:
`http://www.xythos.com/file.doc` or `http://www.xythos.com/`
6. Click **Ok**
7. You will be returned to your email, where the link has now been added directly into the body of the email.

**Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full URL.*

Inserting a link from your Xythos account

1. Navigate to the [Email](#) screen.
2. Click the **Insert Link** button.
3. *Optionally type in the link label*
4. Click the radio button to the left of the **Select File** field.
5. If you know the exact name and location of the file or folder, you may type it in the **Select File** field, otherwise click the  **Expand** icon.
6. Your folder structure will be listed and you may navigate to the file.
7. Click the name of the file or folder in order to select it.
8. Click **Ok**
9. You will be returned to your email, where the link has now been added directly into the body of the email.

**Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full location on Xythos.*

E-mail Share

One of the easiest ways to share files and folders is using e-mail. Using Xythos, you can send links to files, instead of sending the files themselves, which is both faster and saves unnecessarily wasted disk space. There is no need to make duplicate copies of a single file when you simply send a link to the original file. In this manner, every user is always looking at the most recent version of the file and there is also no longer any need to save files to your local desktop.

E-mailing File Links

When emailing a link, the recipient receives three items: the full path and file name of the share, an abbreviated link, and an option to subscribe or bookmark the resource.

The full path and file name of the share will be shown in the event that the user would like to manually navigate to the share. Should the user have problems accessing the file, it becomes easier for the recipient user to browse to the file knowing the full folder path. Keep in mind that correct access permission must also exist in order for the user to browse to the file.

The abbreviated link is also known as the file's Intellilink because it uses Intellitach technology to create a shorter link which is useful in preventing the URL from wrapping once it is automatically pasted into the e-mail message itself. Once the link is pasted into the e-mail message, the link should not wrap and thus allows the recipient user to simply click on the link to access the file. The Intellilink also automatically launches the Xythos interface when the recipient user clicks the link.

The third item the email recipient receives is an option to subscribe or bookmark the resource. This link contains not only the link to the Bookmark screen, but also the full path and file name of the resource. It is possible that the link will be more than one line long, which depending on the email client may or may not be clickable. If the user is unable to click on the link, they may use the intellilink option and bookmark the location from there or use the path and file name information to manually locate the resource.

E-mailing Tickets

Tickets allow users access to your files and folders without requiring those users to have Xythos accounts and without the need to change the user's permission. Tickets allow the access permission to be defined per ticket, rather than per user. Therefore, you can create a ticket such that any user who knows the URL may access the file.

Tickets have several advanced options including password-protection and expiration dates. For more information about tickets, refer to [Tickets](#).

E-mail an existing Ticket for a file or folder

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Email** button.
3. Your default e-mail client will open.
4. The full path and file name of the ticket will be listed, along with an intellilink which does not require a Xythos account to access.
5. Click the **Exit** button in order to exit the **Ticket** screen.

**Note: Once you have finished composing the automatically-generated e-mail message, you may e-mail the link to any non-Xythos or Xythos user. If you have sent the password-protected link, you must separately provide your e-mail recipients the correct password.*

For more information about tickets, visit [Using Tickets](#).

Commenting Your Files and Folders

Comments offer users the ability to create notes about a particular file or folder without altering the contents of that file or folder.

Comment a file or folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. On the **Document Manager** screen, **Right-Click** the selected file or folder.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Enter text into the comments box.
6. Once you have finished entering the comment text, click the **Save** button to view applied changes.
7. Click the **Exit** button to close the Comments screen.

Delete a single comment on a file or folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. On the **Document Manager** screen, **Right-Click** the selected file or folder.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Click the "**X**", delete icon next to the comment you wish to delete. The comment will be immediately and permanently deleted.
6. Click the **Exit** button to exit the Comments screen.

Delete all comments on a file or folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the file or folder you wish to comment.
3. On the **Document Manager** screen, **Right-Click** the selected file or folder.
4. Click the **Manage -> Comments** option.
5. The Comments page displays the current comments. Click the **Delete All Comments** button. All comments will be immediately and permanently deleted.
6. Click the **Exit** button to exit the Comments screen.

Search, Log and Track

About Search

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

Quick Search

A Quick Search allows you to search for a file based on the file's name and content within the current folder.

Search

A Search allows you to search for a file based on the file's name, the file's properties, or a combination of both.

Advanced Search

An Advanced Search allows you to search for a file based on the file's name, the file's properties, or a combination of both with the ability to add additional criteria at your discretion.

Search Guidelines

- Search returns results on whole word matches.
- Searches based on common words like "the" and "and" do not return results.
- The search criteria is not case-sensitive.
- Find results with all of the words by adding a "+" before each word or placing the keyword "AND" between each word.

For example:

+Xythos +San + Francisco
Xythos AND San AND Francisco.

- Find results with the exact phrase by placing the phrase within quotes.

For example:

"Document Management Suite"

- By default, you are finding results with at least one of the words. If you enter more than one word, files with at least one match are returned.

Xythos User Help

- Find results without the words by passing in a desired match along with a word to exclude. The word(s) to be excluded are identified by adding a "-" before each word.

For example, to retrieve all documents containing "2006 Expense Report" but excluding documents related to "Conventions"
+2006 +expense +report —conventions


Search

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

Perform a Quick Search

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

Perform a Search

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

The File or Folder Name	<ol style="list-style-type: none"> 1. Using the drop-down menu, select either Name "Contains" or "Equals". 2. Enter the word in the File or Folder Name field that you wish to find.
File Content Contains	Enter in the word(s) in the File Content Contains field that you wish to find.
Conditions	"Where all these conditions are met" or "Where any of these conditions are met".
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".

3. Click **Search**

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


Save a Search

1. Navigate to the Search or [Advanced Search](#) screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search** button.
5. Within the **Save Search** window, supply a name for the search.

6. Click **Ok**.

For more information about renaming and managing saved searches, view [Manage Searches](#).

Save search results

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

Advanced Search

Advanced Search allows you to search for a file based on standard file properties, file classification properties or a combination of those properties. To learn more about file classification, visit [Classification](#).

Perform an Advanced Search

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

File or Folder Name	<ol style="list-style-type: none"> 1. Using the drop-down menu, select either File or Folder Name "Contains" or "Equals". 2. Enter the word in the File or Folder Name field that you wish to find.
File Content Contains	Enter in the word(s) in the File Content Contains field that you wish to find.
Standard Properties	Using the drop-down menu, select from the available standard properties, such as: Tags, Owner, Name, etc.
Document Class Properties	This option is only available if the classification module is enabled by your Administrator. Using the drop-down menu, select from the available document classes and their properties as specific to your environment.
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".

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

To read more about **Document Classes** visit [Classification](#).

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

Save a Search

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

For more information about renaming and managing saved searches, view [Manage Searches](#).


Save search results

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


Manage Searches

Within Xythos you may create, modify and visit your searches at any time. Not only the search results may be saved, but also the search itself. If you know that each month you must perform a search based on content or classification properties, you need only use the existing saved search. To learn more about saving searches and search results, visit [Search](#).


Last Search

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

Saved Searches

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

Managing your Searches

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

Log

Default Logging

The Logging option on a folder differs from the logging setting of a file. With files, the system allows you to keep a record of who accesses your files and when they do so. Logging on a folder, however, sets the default logging for all files created within that folder. The folder itself does not have logging history, instead it dictates the *default* logging for the files created within the folder.

If Logging is **Off** for a folder, each new file uploaded to that folder will be uploaded with Logging disabled. Additionally, all new sub-folders will have a Default Logging parameter of **Off**.

If Logging is **On** for a folder, each new file uploaded to that folder will be uploaded with Logging enabled. Additionally, all new sub-folders will have a Default Logging parameter of **On**.

Turn default logging on or off for a folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to change default Logging.
3. **Right-Click** on the folder, and then select **Manage -> Default Logging** or click the **Manage** button, and then click the **Default Logging** link.
4. Use the Logging on/off drop-down to turn logging on or off. If you would like this parameter changed for all existing files and sub-folders within this folder, put a check mark next to "Apply this logging setting to all sub-folders as well as all files". Otherwise, this setting will only apply to new files and sub-folders created in the future in this folder.
5. Click the **Apply** button to view applied changes, or click the **Exit** button to exit the Logging screen.

File Logging

The Logging option allows you to keep a record of who accesses your files and when they do so. The current Logging status of a file, *on* or *off*, can be seen in the file's **Summary/Manage** screen.

When an action is performed against a file, an entry is added to the log history including:

- The user who performed the action
- The type of action performed
- The date and time the action occurred
- The IP Address of the machine from where the action occurred

Actions include but are not limited to users viewing or editing the file, permission changes, and file comments that are added, edited, or deleted.

Turn logging on or off or to view a history of file access

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on logging.
3. **Right Click** the selected file, and then click the **Manage -> Logging** option.
- OR -
4. On the **Manage** screen, select the **Logging** link.
5. Within the **Logging** screen, click the **Enable Logging** button.
6. Click the **Exit** button to exit the Logging screen.

The Logging screen displays the history of who has accessed the file for the time period in which Logging is On. Note that a logging history can only be applied to files, not to folders.

Version

Default Versioning

The Versioning setting on a folder differs from the versioning setting of a file. With files, the system allows you to track every change made to any file by saving a copy (version) of a file each time that file is saved. Versioning on a folder, however, sets the default versioning for all files created within that folder. The folder itself does not have versioning history, instead it dictates the *default* versioning for the files created within the folder.

If Versioning is **Off** for a folder, each new file uploaded to that folder will be uploaded with Versioning disabled. Additionally, all new sub-folders will have a Default Versioning parameter of **Off**.

If Versioning is **On** for a folder, each new file uploaded to that folder will be uploaded with Versioning enabled. Additionally, all new sub-folders will have a Default Versioning parameter of **On**.

Turn default versioning on or off for a folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to enable versioning.
3. **Right-Click** the selected folder, and then click the **Manage -> Default Versioning** option.
- OR -
On the **Manage** screen, select the **Default Versioning** link.
4. Use the Default Versioning on/off drop-down to turn default versioning on or off. If you would like this parameter changed for all existing files and sub-folders within this folder, put a check mark next to "Apply this default versioning setting to all sub-folders as well as files". Otherwise, this setting will only apply to new files and sub-folders created in the future in this folder.
5. Click the **Apply** button to view applied changes, or click the **Exit** button to exit the Default Versioning screen.

File Versioning

The Versioning function is an effective way to keep track of the changes made to any file. Versioning allows you to see changes that were made each time a file was saved; this is especially useful when there are multiple users making changes.

When you turn on the Versioning option for a file, the system automatically keeps a copy of each file that is updated. If you or another user edits your file and saves the changes, Versioning allows you to go "back" to the older copy before the changes were made. Versioning provides an automatic backup for overwritten files.

Versioning also includes the ability to **Checkin** and **Checkout** a file. By checking a file in and out (while versioning is enabled), you can make multiple edits to the file without saving multiple versions of the file. **Checkin** and **Checkout** allows you to better leverage your versioning system; you can control exactly which versions are saved in a file's history. For more information about this function, refer to [Checkin and Checkout](#).

Turn Versioning on or off for a file

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on versioning.
3. **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. Use the **Enable/Disable Versioning button** to turn versioning on or off.
5. Click the **Exit** button to exit the Versioning screen.

View an older version of a file (only applicable if versioning is On)

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on versioning.
3. **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. The Versioning window displays each "stage" of an evolving document: Version 1, Version 2, etc.
5. Clicking on the version number will allow you to view (not edit) the file in that particular stage. For example, to view "Version 1" click on "Version 1"

and you will be able to view the file prior to any changes made in later versions.

The versioning system also allows you to copy any version of your file, thus creating a **fully editable copy** of your file at any stage in its history.

Regain an older version of a file

1. Navigate to the **Document Manager** screen.
2. Navigate to the file for which you wish to turn on versioning.
3. On the **Document Manager** screen, **Right-Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. The Versioning window displays each "stage" of an evolving document: Version 1, Version 2, etc.
5. Place a check in the box associated to the file version you wish to copy/regain.
6. Click the **Copy** button in the Versioning window and specify or browse to a destination path for the new copy.
7. To rename the file, simply change its name in the Destination text box and click on **Ok**. The copied version now appears in the current folder listing.

File Checkin and Checkout

When you turn versioning on for a file, you are automatically given the option to Checkin and Checkout that file. There are three types of actions involved in file checkin/checkout:

- **Checking out** a file allows a user to edit the file and save it multiple times without creating multiple versions of that file. Checking out a file also creates a lock (if the file is not already locked) on a file which prevents other users with write permission on that file from editing it. Checking out a file does not, however, prevent users with read permission from seeing the changes made to the file while it is checked out. Users will be able to see the very latest version of the file whether or not the file has been checked in.
- **Checking in** a file creates a permanent version of the file that encompasses all changes made while the file was checked out. Checking in a file also removes the lock on the file.
- **Unchecking out** a file not only removes the lock that was created when the file was checked out, but it also removes the temporary Version of the file that was created when the file was checked out. Unchecking out a file essentially reverses the entire checkout process. No changes made to the file while the file was checked out are kept after the file is unchecked out.

Checkout a file (only applicable if versioning is On)

1. Navigate to the **Document Manager** screen.
2. Navigate to the file you wish to check out.
3. **Right Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. Click the **Checkout File** button. Automatically, a temporary version of this checked out file is created.
5. Click **Exit** button to exit the **Versioning** screen.

You may now edit this file as you wish and no additional versions of it will be created.

Checkin a file (only applicable if versioning is On and the file is checked out)

1. Navigate to the **Document Manager** screen.
2. Navigate to the file you wish to check in.

3. **Right Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. Click the **Checkin File** button. The checked in version overwrites the temporary version that was created when the file was checked out.
5. Click **Exit** button to exit the **Versioning** screen.

Uncheckout a file (only applicable if versioning is On and the file is checked out)

1. Navigate to the **Document Manager** screen.
2. Navigate to the file you wish to un-checkout.
3. On the **Document Manager** screen, **Right Click** the selected file, and then click the **Manage -> Versioning** option.
- OR -
On the **Manage** screen, select the **Versioning** link.
4. Click the **Uncheckout File** button. The temporary version that was created when the file was checked out is automatically deleted.
5. Click **Exit** button to exit the **Versioning** screen.

Note: It is not necessary to select the version of the file, as the most recent version of the file will always be used. If you would prefer to checkout an older version of the file, you will need to utilize the **Make a Copy button.*

Tags

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

Within the **Document Manager** you may set your **Document Manager Columns** to show the **Tags** associated to the files. For more information on modifying your **Document Manager Columns** visit [Document Manager](#).

Creating a Tag

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

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

Creating a Tag for a group of files

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

**Note: Words separated with a space will be identified as separate tags. You may enter several tags for the file at once by separating words with*

*spaces. If you click the **Submit** button prior to clicking the **Add** button, no **Tags** will be added.*

Modifying a Tag

Tags cannot be modified, however, they can be deleted and a new Tag can be created.

Deleting a Tag

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

Deleting a Tag for a group of files

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

Searching for a Tag

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

Bookmarks

Creating Bookmarks

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

You may navigate to your bookmarks at any time by clicking on the **Bookmarks** button.

In order to bookmark a file or folder, you must have **read** access to that file or folder. Once you bookmark a file or folder, it will be available each time you login to your account and click on the **Bookmarks** button which is located in the Navigation Toolbar.

Bookmark a file or folder

1. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Create a Bookmark** button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Bookmark** option.
- OR -
On the **Document Manager** screen, click the **Bookmark** button, and then select the "**Manage Bookmarks**" link, and then click the **Create a Bookmark** button.
2. Provide a name for the Bookmark
3. Provide the Full Path of the file or folder

**Note: This will be provided for you if you have selected the file or folder first.*

4. Optionally use the **Expand** button to browse to the Full Path of the file or folder.
5. Click **Ok**.

Bookmarking through email

When sharing a file or folder, you are provided with the option to notify the user via email. When the email is received, there is a link to the shared file or folder. This link, when clicked will provide an option to bookmark the shared item.

Xythos User Help

1. Click on the **link** which is supplied in the email.
2. You are brought to the Bookmark and Subscribe window. Place a checkmark in the **Bookmark** box.
3. Specify a name for the new bookmark in the space provided.
4. Click **OK**.

Using and Managing Bookmarks

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

You may navigate to your bookmarks at any time by clicking on the **Bookmarks** button.

In order to bookmark a file or folder, you must have **read** access to that file or folder. Once you bookmark a file or folder, it will be available each time you login to your account and click on the **Bookmarks** button.

If a bookmarked file or folder is moved, renamed, deleted or read permissions are removed, the bookmark will be broken. The bookmark will no longer be listed in the Bookmark list, however it will still appear on the **Manage Bookmarks** screen, should you wish to repair or delete the broken bookmark.

Edit a bookmark

1. On the **Document Manager** screen, click the **Bookmarks and Searches** icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to modify, and then click the **Edit** button.
3. Modify the **Bookmark Name** and/or the **Full Path**
4. Click **Submit**.

Delete a bookmark

1. On the **Document Manager** screen, click the **Bookmarks and Searches** icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to delete, and then click the **Delete** button.
3. The Bookmark will be immediately deleted.

Subscribe

Creating Subscriptions

Subscriptions are available to users with **read** access. A notification is sent via e-mail when files or folders are viewed, changed, or commented.

Create a new Subscription

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

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

Subscriptions Through Email

When sharing a file or folder, you are provided with the option to notify the user via email. When the email is received, there is a link to the shared file or folder. This link, when clicked will provide an option to subscribe to the shared item.

1. Click on the **link** which is supplied in the email.
2. You are brought to the Bookmark and Subscribe window. Place a checkmark in the **Subscribe** box.
3. Click **OK**.

"Notify me of" Options

Event	Option
Change Events	<p>"Change Events on files" include:</p> <ul style="list-style-type: none"> • When a file is uploaded and an existing file is overwritten • When a file is moved or deleted • When a file has been copied or downloaded <p>"Change Events on folders" include:</p> <ul style="list-style-type: none"> • When any of the above file events occur to any file or sub-folder within the specified folder • When a file is initially uploaded to a folder • When a file within the specified folder has been moved • When a sub-folder is created within the specified folder • When the folder itself has been deleted
Read Events	<p>"Read Events" include:</p> <ul style="list-style-type: none"> • When a file is viewed or opened. • When a file within the folder is viewed or opened.
Comment Events	<p>A comment event occurs whenever a comment is created on a file or folder.</p>

Cancel an existing Subscription Within the Document Manager or Records Manager

When canceling via the file or folder's manage screen, you will only see those subscriptions which are pertinent to the file or folder you are currently managing.

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

Visit [Subscriptions](#) to learn more.

Cancel an existing Subscription Within Reports

Cancelling a subscription from the Reports & Tools tab will allow you to see all subscriptions within the system, rather than a folder by folder view as the Manage screen offers.

1. Click on the **Home** link in the upper left main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Subscriptions** tab.
4. Click the associated "**X**" icon to the subscription you would like to cancel.

Visit [Subscription \(Reports\)](#) to learn more.

Subscriptions

Subscriptions automatically notify you when a file or folder has been viewed, changed, or commented.

Subscription notifications are sent via e-mail either when the viewing, changing, or commenting occurs or at a certain time of day. Such notifications are known as subscription **reports**. The type of report (view, change, or comment) and frequency of the report is determined when the subscription is created.

View existing Subscriptions for the file or folder

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

Cancel existing Subscriptions for the file or folder

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

Automatic cancellation of a Subscription or notification

Subscriptions and their notifications are also automatically canceled due to certain changes within the system. If the subscribed file or folder is deleted, the subscription is automatically canceled.

If the permissions of a file or folder are changed such that the current subscriber no longer has the correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

Create a new Subscription

Refer to [Creating Subscriptions](#).

View all current Subscriptions for all files and folders

Refer to [Subscriptions \(Reports\)](#).

RSS Feeds

Xythos allows you to create a Really Simple Syndication (RSS) feed to any folder, file or search results listing. RSS feeds are commonly used to publish frequently updated content. You must use a 'reader' or 'aggregator' to access the feed once you subscribe to it. Readers retrieve and present the most recent content to you.

You may share your feed URLs with other users; however sharing access still applies. For example, if you share a feed URL to a user who does not have **read** access to those files or folders, they will not be able to properly view the RSS feed. Suppose you subscribe to a folder to which both you and another user have **read** access. However, the content within that folder is only readable to you; the other user does not have **read** access on that content. When the other user accesses that feed, the user will be allowed to see the feed but there will be no content displayed.

Upon accessing a URL feed, you may be prompted to login.

Search results are also dependent upon your sharing access. For example, if a user is searching for "flower" and the search results are "daffodil", and "iris"; however, the user does not have access to "iris", then they will only see the result for "daffodil".

You may also share a feed URL with users who do not have an account on Xythos. If there is read access granted to **Public** for that particular file or folder, any user will see that content through the RSS feed.

Normally, RSS feeds are of the format:

```
https://www.xythosondemand.com/<folder_path>/_xy-rss-  
<search_results_name>
```

To share this URL with public users, edit the URL to be:

```
https://www.xythosondemand.com/<folder_path>/_xy-rsspub-  
<search_results_name>
```

Note: when subscribing to a file, the feed shows any new versions created for that file. Therefore, you should only subscribe to feeds for those files which are **versioned. Otherwise, the content of the feed will never change.*

Subscribe to an RSS feed for a file or folder

1. Navigate to the **Document Manager** screen.

2. Navigate to the file or folder of your choice.
 3. Place a checkmark in the box associated to the file or folder, and then click the **RSS Feed** button.
- OR -
4. **Right-Click** the file or folder's name, and then select **Create RSS Feed**.
 4. Follow your browser's instructions on how to create the RSS feed.

Subscribe to an RSS feed for a search

1. Within the **Document Manager**, click the **Bookmarks and Searches** icon to the left of the navigation bar. This will open the **Searches and Bookmarks** menu.
2. Click on the **Manage Searches** link.
3. The Manage Searches screen will open and all currently saved searches will be listed by name.
4. Click the **Create RSS** button associated to the search of your choice.
5. Follow your browser's instructions on how to create the RSS feed.

View an RSS feed through a reader

1. Follow the instructions above depending on whether you would like to view an RSS feed to a file, folder, or search results. After clicking the **Create RSS** button, follow the rest of these instructions.
2. Copy the URL your browser launches after clicking the **RSS** button. You may copy this URL directly from your browser's URL address.
3. Launch your preferred reader.
4. Find your reader's **Add Subscription** feature and paste in the RSS URL.
5. Follow any other instructions provided by the reader.

Wiki

Using Wiki

Xythos allows you to create a wiki. A wiki is, essentially, its own website that enables both you and properly permissioned users to add, remove, edit and change content. Wikis allow for linking among any number of pages. When you create a wiki using Xythos, a folder which shares the name of your wiki is automatically created in your Document Manager.

Create a Wiki

1. On the **Document Manager** screen, click the **New Wiki** button.
2. Determine the location of the New Wiki by typing or browsing to the **Wiki Home Folder**.
3. **Name** your Wiki.
4. Click the **Ok** button.
5. Click the **Launch** button in the confirmation screen to launch the new wiki.

Adding Content

Within a Wiki you must create content; that content is called a **Panel**. There are various different types of panels:

Text Editor	The text editor allows you to enter plain text. The editor's toolbar allows you to format that text using different font styles, bullets and more. The text editor also allows you to add images and links to external files.
Saved Search Results	The saved search results displays the resulting files found for the chosen search. The list of searches are your saved searches. To add an additional search, define it through the web view.
Upload Files	The upload files panel gives you the ability to upload files to the wiki. These files are then displayed in the panel as a list of the file names that are links to the actual files.

Create a Wiki Panel

After providing a name for the Wiki, you will be prompted to add a panel.

Text Editor Panel

1. Provide a name for the Panel. *(Optional)*
2. Type content into the available box.

3. Use the available formatting buttons to modify the appearance of the Panel, and to add graphics and links.
4. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

Saved Search Panel

1. Provide a name for the Panel. *(Optional)*
2. Provide a description for the Panel.
3. Select an available saved search from the dropdown menu.
4. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

Upload Files Panel

1. Provide a name for the Panel. *(Optional)*
2. Click the **Add Files** button.
3. Use the **Upload** feature in order to add files.
4. Once the file(s) has been uploaded, specify a caption.
5. You may remove a file by clicking the "x" delete icon associated to the file.
6. Click the **Add Panel** button to continue adding content, or click the **Finish** button.

Click any of the available tabs in order to continue configuring your Wiki, or click the **Finish** button if configuration is complete.

Sharing Content

1. Click the **Permissions** tab.
2. Add *users* and *Groups* as **Viewers** and **Contributors**. To learn more about Sharing, visit [Sharing](#).
3. Click **Finish** when complete.

Click any of the available tabs in order to continue configuring your Wiki, or click the **Finish** button if configuration is complete.

E-mail Notification of Content

1. Click the **Email** tab.
2. Use the **To** button to add additional users. By default the users with whom you have shared this resource will be listed.
3. *Optionally specify a subject.*
4. *Optionally provide a personalized message.* Be certain to leave the "Wiki Link" item within the email so that the Wiki Link may be automatically generated.

5. Click the **Finish** button. To learn more about Email notifications, visit [Email](#).

Click any of the available tabs in order to continue configuring your Wiki, or click the **Finish** button if configuration is complete.

Managing a Wiki

Add/View Discussions

1. Navigate to the location of the Wiki.
2. Double click on the Wiki.
3. Click on the **Discussion** tab.
4. All previously entered comments will be listed.
5. Enter in a comment, and then click the **Save** button.

You may continue entering in comments, or click another of the available tabs to view other information about the Wiki.

View the History of the Wiki

1. Navigate to the location of the Wiki.
2. Double click on the Wiki.
3. Click on the **History** tab.
4. All versions, creation dates, creators, and size will be listed.

You may click any other available tab to view other information about the Wiki.

Edit a Panel

1. Navigate to the location of the Wiki.
2. Double click on the Wiki.
3. Click on the **Wiki** tab.
4. All Panels will be listed.
5. Click the **Edit this Panel** button associated to the Panel.
6. Make the appropriate modifications, and then click the **Finish** button.

Delete a Panel

1. Navigate to the location of the Wiki.
2. Double click on the Wiki.
3. Click on the **Edit Page** button.
4. Click the **Remove Panel** button associated to the Panel you wish to delete.

Delete a Wiki

1. Navigate to the location of the Wiki
2. Double click on the Wiki
3. Click on the **Edit Page** button
4. Click on the **Delete Page** button
5. Click the **OK** button when prompted with the following message: *"Deleting this Wiki page will delete this page as well as any Sub Wiki pages underneath it. It will permanently delete all content uploaded to this Wiki page and any sub Wiki pages. Click 'OK' to delete this page, or 'Cancel' to return to the edit screen."*

New Wiki

You have the ability to either create a new wiki, or use an existing wiki as a template. If you use an existing wiki, you will not be modifying the original file. All data from the existing wiki will appear and you may modify as necessary. It is recommended to create a generic wiki to use as a template for a department or group.

Creating a new Wiki

1. Click on the **New Wiki** button.
2. Specify a name for the Wiki.
3. Click the **Ok** button.
4. Click the **Launch** button in the confirmation screen to launch the new wiki.

Creating a wiki from an existing wiki

1. Click on the **New Wiki** button.
2. Specify a name for the Wiki.
3. Type in the exact location of the Wiki you wish to use as a template, or select the **Expand** icon.
4. If using the expand option, navigate to the Wiki you would like to use as a template.
5. Click the **Ok** button.
6. Click the **Launch** button in the confirmation screen to launch the new wiki.

For more information about wikis, visit [Using Wiki](#).

Uploading Files to Wiki

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 plugin available from www.java.com. If you have the Java plugin 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 plugin, use Basic Upload.*

Basic Upload

1. Click on the **Browse** button to locate a file on your local computer.
2. Click the **Upload** button.
3. If you wish to add additional files, repeat steps 1 and 2.
4. When you have completed adding files to your wiki, click the **Exit** button.
You may always return to your wiki to upload additional files later.

Advanced Upload

1. Drag and drop the files or folders you wish to upload to your wiki.
Alternatively, use the **Add Files** button. You may add multiple files and folders at once by using either method. When adding folders, you will be adding only the contents of the folder; the folder structure will not be maintained.
2. Review the files and folders listed in the upload window.
3. Click the **Start Upload** button.
4. You will see an "upload completed successfully" notice.
5. If you wish to add additional files, click on the **New Upload** button and repeat steps 1 through 3.
6. When you have completed adding files to your wiki, click the **Exit** button.
You may always return to your wiki to upload additional files later.

Saved Search Results in a Text Panel

1. Provide a **title** for the new panel.
2. Provide a **description** for the saved search results panel.
3. Choose your saved search from the drop-down menu.
4. Click the **Ok** button.

Upload Files in a Text Panel

1. Provide a **name** for the new panel.
2. Click the **Add Files** button to upload files.
3. The upload screen will appear. Visit [Upload Files to Wiki](#) for more information.
4. All uploaded files will be listed, along with a field for the description, and an option to remove the file.
5. Provide a description for the file(s).
6. Click the **Ok** button.

Dropbox

Dropbox Overview

The purpose of a dropbox is to allow a user to add content without the ability to modify or remove the content once it has been added. There are two types of dropbox users -- the submitter and the administrator.

- **Administrator:** A dropbox administrator is a user which has either created the dropbox, or has been added as a dropbox administrator to an existing dropbox. This user has the ability to view, modify and delete any content located within the dropbox. The administrator may also close or open the dropbox to submissions. Visit [Dropbox Administration](#) for more information.
- **Submitter:** A dropbox submitter is a user which has been added to the dropbox by the dropbox administrator. This user has the ability to add any content from either their local computer or from their existing account. The submitter may view any content they have added to the dropbox, however they may not modify or delete the content. There may be multiple submitters for each dropbox, however the submitters will only see their own files. Visit [Using the Dropbox](#) for more information.

Submissions

When creating a new dropbox, the administrator may set the date on which the dropbox is available for submissions. If this date is left blank, submissions may be made immediately. The final submission date, or dropbox close date, may also be set. For more information regarding managing the open and close dates of dropboxes, visit [Managing the Dropbox](#).

With several submitters to a single dropbox, it is highly probable there will be files with the same name added to the same dropbox. If submitter "Sally" adds the file "bird.jpg", and the submitter "Steve" adds the file "bird.jpg" to the same dropbox, there will not be any type of conflict or renaming of the file. If, however, the submitter "Sally" adds the file "bird.jpg" and attempts to add another file "bird.jpg" to the dropbox, an error will be received. It is not possible to upload a file of the same name in an effort to replace the file. You must rename the file.

Permissions

Providing access to a dropbox should be done from within the dropbox wizard, or the dropbox manage pages. Similar to a wiki, access should not be granted through the traditional share and permissions pages for files and folders. If this

should accidentally occur, open and save the dropbox. This resets permissions correctly.

Accessing a dropbox

The dropbox administrator may notify a user of dropbox access using either of two methods.

- **Copy link location:** Within the Document Manager, navigate to the location of the dropbox.xapp file of your choice. Right-click on the file, and then select the "Copy link location" option. You may paste this link into an email, or use it as a web link, etc. If this link is sent to a recipient whom is listed as neither an administrator or a submitter they will not be able to view the dropbox.
- **Dropbox details:** Navigate to the dropbox manage screen. Click on the dropbox details link, and then copy the dropbox location into an email, or use it as a web link, etc. If this link is sent to a recipient whom is listed as neither an administrator or a submitter they will nto be able to view the dropbox.

Adding Content

Similar to the file upload options in the webview, you have the ability to use either standard or advanced upload options. When using the advanced upload option, you must have Java 1.5 or newer installed. For more information on adding content, visit [Using the Dropbox](#).

Missing files in the dropbox

It is possible that a file you submitted to the dropbox a week, or a moment ago may no longer show up in the dropbox. Files may be moved by the dropbox administrator at any time. Your file is not missing, but rather moved to a location in which you do not have access.

Closed dropbox

A dropbox may be closed at any time by the dropbox administrator. If the dropbox is closed you may longer submit content and should contact the dropbox administrator. When visiting a closed dropbox, it will be plainly displayed as "closed" and none of your content will be listed.

Dropbox Administration

As the dropbox administrator, you may determine who has access to use the dropbox and when. Users of the dropbox do not have delete or write access to their added files. With Administration access, you may modify, delete and move any file. For additional dropbox information, visit the [Dropbox Overview](#) page.

Creating a dropbox

1. Navigate to the **Document Manager**.
2. Click on the **New Dropbox** button.
3. Provide a **title** for the dropbox. For example, you may specify a title such as "Fall 2008 Term Papers" or "John Smith Loan".
4. Optionally provide a **description**.
5. You may select a date and time when the dropbox will begin accepting files. If you do not specify a date and time, the dropbox will accept files immediately. Click on the **calendar** icon to select the date, and then use the drop down option to select the time. The time zone defaults to the administrator's time zone as set in their user settings.
6. You may select a date and time when the dropbox will no longer accept file submissions. If you do not specify a date and time, the dropbox will accept files until you either manually close the dropbox or specify an auto close date while managing your dropbox.
7. Click **Next**.
8. Use the [find](#) option to locate users and groups for which you wish to add access.
9. Once you have completed adding submitters, click the **Finish** button.
10. Click the **Launch** button in the confirmation screen to launch the new dropbox.

Once the dropbox is created, you will be brought to the dropbox administration screen. As an administrator you will have the following options:

- **Manage:** You may [manage](#) the dropbox's current settings, including the automatic close and open dates, and assigning dropbox administrators.
- **Filter:** You may filter the files in the dropbox according to the user who has submitted the file, and submission date and time. Once you have selected your filter options, click the **Apply Filter** button to view the results.
- **Move:** Move any or all of the submitted files to another location.
- **Delete:** Delete any or all of the submitted files.
- **Refresh:** Refresh the current view of the dropbox. Refreshing will clear search results and any new submissions will be shown.
- **Close/Open Submissions:** If the dropbox is currently open, you will have the option to manually close the dropbox to submissions. If the dropbox is

currently closed, you will have the option to open the dropbox to submissions.

For more information on managing your dropbox settings, visit [Managing the Dropbox](#).

Administering your dropbox

1. Navigate to the **Document Manager**.
2. Navigate to the dropbox you would like to administer.
3. Double-click on the file (e.g. my_dropbox.xapp) to launch the dropbox administration screen.
4. You may use any of the above administrator options on your dropbox.

Managing the Dropbox

As the dropbox administrator, you have access to modify or manage the properties of the dropbox. For additional dropbox information, visit the [Dropbox Overview](#) page.

Managing the details of a dropbox

1. Navigate to the **Document Manager**.
2. Navigate to the dropbox you would like to manage.
3. Double-click on the file (e.g. my_dropbox.xapp) to launch the dropbox.
4. Click on the **Manage** button from within the Administrator's dropbox screen.
5. Click on the **Details** link.
6. Change the title of the dropbox. You may change this title to anything you wish, however it may not be blank.
7. Create or modify the description of the dropbox. You may leave this blank if you so choose.
8. The URL is listed and may be copied to an email or for other use.
9. The Status (Opened/Closed) is listed.
10. Change or create the auto open date and time using the calendar icon and drop down menu.
11. Change or create the auto close date and time using the calendar and drop down menu.
12. Click the **Exit** button when you have completed viewing or modifying your dropbox details. If you would like to continue browsing your manage pages, click the **Apply** button.

Managing the submitters of a dropbox

1. Navigate to the **Document Manager**.
2. Navigate to the dropbox you would like to manage.
3. Double-click on the file (e.g. my_dropbox.xapp) to launch the dropbox.
4. Click on the **Manage** button from within the Administrator's dropbox screen.
5. Click on the **Submitters** link.
6. Click on the **Add User/Group** button to add submitters.
7. Place a checkmark in the box associated to the user or group you wish to remove, and then click on the **Delete** button.
8. Click the **Exit** button when you have completed viewing or modifying your dropbox submitters. If you would like to continue browsing your manage pages, click the **Apply** button.

Managing the administrators of a dropbox

1. Navigate to the **Document Manager**.
2. Navigate to the dropbox you would like to manage.
3. Double-click on the file (e.g. my_dropbox.xapp) to launch the dropbox.
4. Click on the **Manage** button from within the Administrator's dropbox screen.
5. Click on the **Administrators** link.
6. Click on the **Add User/Group** button to add administrators.
7. Place a checkmark in the box associated to the user or group you wish to remove, and then click on the **Delete** button.
8. Click the **Exit** button when you have completed viewing or modifying your dropbox administrators. If you would like to continue browsing your manage pages, click the **Apply** button.

Using the Dropbox

As a submitter to a dropbox, you have the permission to add any content you wish, however you may not modify the content once it has been added. You may add content by either uploading the file(s), or you may copy the file(s) from your account. You may view the submitted files as long as the dropbox administrator has not moved or deleted them. If the dropbox has been closed, you will not be able to submit or view files. The dropbox administrator can open or close the dropbox at any time.

Uploading Files

1. Navigate to the dropbox, either by using a supplied link or through the document manager screen.
2. Click on the **Upload Files** button.
3. If you are using the advanced upload screen, you may drag and drop files and folders* directly from your local computer to the upload screen. If you are using the basic upload screen, click on the browse button to upload individual files; select the **Add File** button if you wish to add multiple files.

Note: If you have opted to drag folders into the upload screen, all files will be placed into the dropbox in a single location. The folder and sub-folder structure will not be carried through, and it's possible you may encounter a name conflict should you have multiple files with the same name.

4. Click on the **Start Upload** button.
5. Click the **Next** button.
6. You will receive an "Upload Successful" notice, and may select **Finish** if you do not wish to provide a description for the file. Click the **Next** button to add a description for the file.
7. Enter in the description, and then click the **Finish** button.
8. You will see the new file(s) in the dropbox.

Copy Files From your Account

1. Navigate to the dropbox, either by using a supplied link or through the document manager screen.
2. Click on the **Copy From Your Account** button.
3. Optionally enter in a description for the file.
4. Type in the full path of the file or folder you wish to copy to the dropbox. If you are not certain of the location, use the expand icon in order to navigate to the file or folder you wish to copy to the dropbox.
5. Click the **OK** button.
6. You will see the new file(s) in the dropbox.

Missing files in the dropbox

It is possible that a file you submitted to the dropbox a week, or a moment ago may no longer show up in the dropbox. Files may be moved by the dropbox administrator at any time. Your file is not missing, but rather moved to a location in which you do not have access.

Closed dropbox

A dropbox may be closed at any time by the dropbox administrator. If the dropbox is closed you may no longer submit content and should contact the dropbox administrator. When visiting a closed dropbox, it will be plainly displayed as "closed" and none of your content will be listed.

Other submitters content

You are only able to see content which you have submitted. You may not see content added by other submitters.

Reports and Tools

My Subscriptions

Subscriptions automatically notify you when a file or folder has been viewed, changed, or commented.

Subscription notifications are sent via e-mail either when the viewing, changing, or commenting occurs or at a certain time of day. Such notifications are known as subscription **reports**. The type of report (view, change, or comment) and frequency of the report is determined when the subscription is created.

View all existing Subscriptions system wide:

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

Cancel/Un-subscribe an existing Subscription

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

Automatic cancellation of a Subscription or notification:

Subscriptions and their notifications are also automatically canceled due to certain changes within the system. If the subscribed file or folder is deleted, the subscription is automatically canceled.

If the permissions of a file or folder are changed such that the current subscriber no longer has the correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

Create a new Subscription

Refer to [Creating Subscriptions](#).

View file and folder specific Subscriptions

Refer to [Subscriptions](#).

Active Workflows

Similar to the [Workflow History](#), Active Workflows lists the name, the owner, the file name, start date and status. Active workflows are all currently active workflows, whereas Workflow History lists all inactive workflows. You may have a status of **Running**, **Late** or **Error**. You may view the file or workflow tasks at any time from this screen.

Some users have the ability to **Administer** the workflow instance, and as such will see additional buttons. Administrators may stop a workflow, or re-assign a task. If any of the following criteria is met, the user may administer the workflow instance:

- The user has the Administer privilege on the Workflow Template from which this Workflow was created.
- The user has the "Administer Workflow" ability assigned to their role.
- The user is the Workflow Initiator, as long as the Workflow Template was set to allow the Workflow Initiator to Administer the Workflow. To determine whether or not the Workflow Initiator has this access, view the template details. If the Workflow Initiator is listed as having the ability to Administer the Workflow, this cannot be changed on a Workflow which has been started.

View the workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the Workflow.
5. All tasks, along with the details of the task are listed.
6. Click on the **Exit** button.

View the Template Details for a Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the Workflow.
5. Click on the **View Template Details** button.
6. Changes may not be made to this workflow, however you may view all details including steps.
7. Click on the **Back** button.
8. Click on the **Exit** button.

View the file associated to the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **Name** of the file.
5. The file will then be opened.

Stop the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Active Workflows** tab.
4. Click on the **radio button** associated to the Workflow.
5. Click on the **Stop** button.
6. The Workflow will be immediately stopped and moved to your **Workflow History**.

Reassign a Task

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Tasks** tab.
3. From within the **Tasks** screen, click on the task name.
4. For any user whom has Administer permissions on the Workflow, a **Reassign** button will appear in the bottom right corner.
5. The **Find** screen will appear. Use the available options in order to locate the user to which you wish the task reassigned.
6. Select the user or group, and then click **Next**.
7. The task is now assigned to the user or group and is visible in their **Tasks** screen.

Workflow History

Similar to the [Active Workflows](#), Workflow History lists the name, the owner, the file name, start date and status. Active workflows are all currently active workflows, whereas Workflow History lists all inactive workflows. You may have a status of **Completed** or **Stopped**. You may view the file or workflow tasks at any time from this screen.

View the workflow History

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the Workflow.
5. All tasks, along with the details of the task are listed.
6. Click on the **Exit** button.

View the Template Details for a Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the Workflow.
5. Click on the **View Template Details** button.
6. Changes may not be made to this workflow, however you may view all details including steps.
7. Click on the **Back** button.
8. Click on the **Exit** button.

View the file associated to the Workflow

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Workflow History** tab.
4. Click on the **Name** of the file.
5. The file will then be opened.

All Workflows

The All Workflows screen is the compilation of both the [Active Workflows](#) and [Workflow History](#) screens for all users. The All Workflows screen is only available to those users that have the Workflow Admin ability. Within this screen, you may search for all workflows within the Organization using the following criteria:

Option	Description
Workflow Initiator	The user who starts the workflow, however they are not necessarily the owner of the workflow.
Template Owner	The owner of the workflow template, though they may not have been the original creator.
Start Date After	The date the workflow was started. Search for all Workflows started from this date and later. Use in combination with the "Start Date Before" in order to define a specific date period.
Start Date Before	The date the workflow was started. Search for all workflows started from this date and before. Use in combination with the "Start Date After" in order to define a specific date period.
Workflow State	Running or Completed. If a workflow is currently listed as running, it will be visible in the user's Active Workflows screen and has not yet been completed. If a workflow is currently listed as stopped, it will be visible in the user's Workflow History screen and has either been completed or stopped.

Search for Workflows based on initiator

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Find User** button to the right of the **Workflow Initiator** field.
5. Define the criteria in order to locate the user.
6. Click the **OK** button.
7. Click the **radio button** associated to the desired user.
8. Click the **Next** button.
9. Click on the **Search** button.
10. All workflows initiated by the defined user will be displayed. Note the radio button setting for **Workflow State**.

Search for Workflows based on workflow template owner

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Find User** button to the right of the **Template Owner** field.
5. Define the criteria in order to locate the user.

6. Click the **OK** button.
7. Click the **radio button** associated to the desired user.
8. Click the **Next** button.
9. Click on the **Search** button.
10. All workflows using a workflow template owned by the defined user will be displayed. Note the radio button setting for **Workflow State**.

Search for Workflows based on date

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Calendar icon** to the right of the **Start Date After** field.
5. Select a calendar date on or before today's date. For example, February 14, 2006.
6. Click on the **Calendar icon** to the right of the **Start Date Before** field.
7. Select a calendar date after the date you selected for the **Start Date After** field. For example, November 14, 2007.
8. Click on the **Search** button.
9. All workflows started between February 14, 2006 and November 14, 2007 will be displayed. Note the radio button setting for **Workflow State**.

Search for Completed Workflows

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Completed** radio button.
5. Click on the **Search** button.

Search for Active Workflows

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **All Workflows** tab.
4. Click on the **Running** radio button.
5. Click on the **Search** button.

Expired Document Reporting

The classification module features a utility for reporting and purging expired documents. The utility provides a comprehensive report of all expired documents that are eligible for deletion. You may then initiate a purge of all the documents listed in the report via the same utility.

An expired document is a document that has surpassed its retention rule's calculated expiration date. Once a file is purged from the system, it is deleted and no longer accessible.

Generate a Report

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click the **Generate Report** button.
5. Define the **report's start path**. The start path is the top most folder from which you wish to search. The search will include all sub-folders of the report start path.
6. Define the **Expired documents as of** field. Use the calendar icon to pick a date of expiration. The report will list all documents that have expired from the "Expired documents as of" as well all of the documents that expired prior to that date. The only exclusion are documents that have been previously purged from the system.
7. Click on the **OK** button.
8. Your report will now be listed on the **Expired Documents Reporting** screen.
9. Click the **View Report** button associated to the report in order to view the listed expired documents.
10. The report will now have the status of **Generated Report**.

Purging Expired Documents

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **View Report** button associated to the report in order to view the listed expired documents.
5. Click on the **Purge Documents** button in order to purge all documents listed in this report.
6. Once you have purged all documents, the status of the generated report will now be listed as **Purge Complete**.

Delete an Existing Report

1. Click on the **Home** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Expired Documents** tab.
4. Click on the **Delete** button associated to the report you wish to delete.

My Tickets

Tickets allow both non-Xythos and Xythos users access to your files and folders. For more information on tickets, visit [Tickets Overview](#).

View all existing Tickets system wide:

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

Edit an existing Ticket

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Tickets** tab.
4. Place a checkmark in the box associated to the ticket you wish to edit.
5. Click on the **Edit** button.

Delete an existing Ticket

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

Create a new Ticket

Refer to [Creating Tickets](#).

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 top 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 able to be deleted 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 writable 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**.

Workflow

Workflow Overview

Workflow allows you to better manage and monitor the state of your documents with simple routing, including but not limited to reviews, approvals, and notifications. It allows the flow of work between users and/or departments to be defined and tracked.

All of the workflows you create are listed under [Active Workflows](#) and [Workflow History](#). Workflows are created specific to a file or folder. You can create a workflow by choosing the Start Workflow option for a given file or folder. You can also configure a folder to automatically start a workflow any time a new file or sub-folder is created within that folder.

All currently active workflows can be viewed from Active Workflows; completed workflows can be viewed from Workflow History. As there is no mechanism for deleting completed workflows, the list may be very long and therefore, viewing all completed workflows should be used sparingly.

Create a Workflow for a file or folder

In order to create a workflow on a file, you must have read access to that file or folder. For more information about access permission, refer to [Sharing](#). In addition to file or folder access, you must also have access to the workflow template itself. For more information about Workflow Templates, visit [Workflow Templates](#).

Because a workflow is created on a specific file or folder, you must first navigate to that file or folder.

1. Navigate to the **Document Manager** screen.
2. Right-click on the file or folder and select **Start Workflow**.
3. Select the **Workflow Template** from the drop-down menu. For more information about Workflow templates, visit [Workflow Template Editor](#).
4. Click the **Next** button.
5. Depending on the Workflow Template you selected, you may be required to define parameters such as **participant**, or you may be brought back to the manage screen.
6. Some workflow templates may allow you to select an option **Save this workflow and its parameters as a new template**. If you select this option, you must define a name for the template and optionally select a user to notify of the workflow progress.
7. Once all parameters are completed, click the **Next** button.
8. The active workflow will now be listed in your Manage Active Workflows screen, and each participant's task(s) appears to them.

Workflow Templates

A workflow template defines the logic of a workflow. Every workflow is based on a template that is selected when the workflow is started (created). Templates may be edited, shared, and deleted. For more information on Workflow Templates, visit [Workflow Template Editor](#).

Approval Process

Xyθος ships one pre-defined workflow template, [Approval Process](#), which is shared to all workflow users by default. The behavior of workflows based on this template depend on the parameters specified when the workflow is started, as well as on input from the users participating in the flow. For the specific rules of how a workflow based on the Approval Process template behaves in reaction to its parameters and participant activity, refer to [Approval Process](#).

Target Permissions

In order for users to be able to participate in a workflow on a file or folder (e.g. as an approver or reviewer), they must have read permission on that file or folder. You may add the permission yourself using the [Share](#) functionality. However, if you have permission to share the file, the system will automatically ask you if you would like to correct the permissions when you run the workflow.

In order for users to be able to create a workflow, they must have read permission on the target file or folder.

Sharing Workflow Templates

Workflow templates can be shared to users or groups. There are two levels of permissions for a workflow template:

1. Use -- This allows a user or group to start a workflow based on the template.
2. Administer - This allows a user or group to modify, delete, and share the template.

Share a Workflow Template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Share** icon associated to the workflow template you wish to share.
4. Define the appropriate permissions to the **user(s)** and/or **group(s)** listed.
5. To add additional **users** and/or **groups**, click the **Add User/Group** button.
6. To remove **users** and/or **groups**, click the **Remove User/Group** button.
7. Once you're list of users is complete, define each of their corresponding Use or Administer permissions.
8. Click the **Apply** button.

Add Users/Groups to a Workflow Template's Permissions

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Share** icon associated to the workflow you wish to edit permissions.
4. Click on the **Add User/Group** button.
5. Define the parameters in order to [find](#) the user or group.
6. Click the **OK** button.
7. Click the checkbox associated to the preferred user or group.
8. Click on the **Next** button.
9. Once you're list of users is complete, define each of their corresponding permissions.
10. Click the **Apply** button.

Remove Users/Groups to a Workflow Template's Permissions

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Share** icon associated to the workflow you wish to edit permissions.
4. Click the checkbox associated to the preferred user or group.
5. Click on the **Remove User/Group** button.

6. Click the **Apply** button.

Workflow Templates Editor

Workflow templates allow workflow users to create step by step processes which designated files and folders must step through during their lifecycle. The steps, or tasks, may be assigned to various participants within your organization. You may even [share](#), [import](#) and [export](#) workflow templates.

- **Workflow** -- A workflow is an automated business process. Users with the workflow ability may create, run, and manage workflows. Note that users without the workflow ability may still participate in workflows (e.g. as document approvers); however, they may not create, run, or manage workflows themselves. To run a workflow, in addition to the workflow ability, the user must have read access to the target file or folder.
- **Workflow Template** -- A workflow template is the definition of a specific workflow, assembled from a set of activities. Workflow templates may be shared, copied, imported, and exported. All workflow templates must have a unique name associated to them, and are created and managed within the Template Editor. Users can start workflows in the Document Manager by selecting the **Start Workflow** button or right-click menu option on a specific file or folder. When starting a workflow, the user will be able to choose from a list of all templates which have been shared to that user. For more information on workflows, visit [Workflows](#).
- **Instance** -- A specific execution of a Workflow, also called a Workflow Instance. You may have multiple workflow instances on a single file or folder running simultaneously.
- **Activity** -- An action that can be included in a workflow, such as copy, move, delete, etc.
- **Task** -- A user interaction required by a running activity. A single activity may result in the creation of multiple tasks. For example, an approval activity will create an individual task for each approver.

Available Template Properties

[Name](#)

[Description](#)

[Template Owner](#)

[Workflow Owner](#)

[Send Notification of Workflow Progress To Workflow Steps](#)

Property	Description
Name	Define a name for the workflow template. This is required and all template names should be unique .
Description	Provide a description for the workflow template.
Template Owner	<p>The owner of this workflow template. Every action performed by the workflow will be performed in the security context of the template owner. Should a template be copied, the user who makes the copy will be the owner of the new template. The template owner is automatically an administrator of the template and any instances based on the template.</p> <p>An example of template administration would be to copy, delete or edit the template. An example of instance administration would be to abort or reassign a task, or monitor the progress of the workflow. You may only select yourself as the owner of the template. You may not assign another user as the owner due to the permission based ownership which follows the template.</p>
Workflow Owner	Define the owner of the workflow instance. Select either the Workflow Template Owner , the person marked as Owner in this template; or the Workflow Initiator , the person who actually initiates the workflow instance. The workflow owner is explicitly an administrator of any instances based on this template. An example of instance administration would be to abort or reassign a task, or monitor the progress of the workflow. The workflow instance owner is the person designated to take corrective action should an error occur during the workflow. This is required.
Send Notification of Workflow Progress To	Send an email notification to nobody , the workflow template owner or the workflow initiator upon completion of each step.
Workflow Steps	Predefined sets of activities that walk the file through it's lifecycle. At runtime, activities will generate tasks, which will show up in the user's Tasks tab within the Document Manager space.

Available Workflow Steps

[Do Nothing](#)

[Approval or Review](#)

[Move File](#)

[Copy File](#)

[Delete File](#)

[Add Tag](#)

[Set Property](#)

[End Workflow](#)
[Restart or End](#)

Do Nothing

No actions are required during this step. This is typically used when creating a conditional THEN/ELSE step such as Approval or Review.

Approval or Review

Prepare the file for approval or review based on the information provided by the initiator and participant. This step will solicit review or approval of a document from one or more participants. Parameters such as the reviewer or approver names can be entered in the template, or optionally collected from the workflow initiator. Based on the results of the participants' input (e.g. approval or rejection), the workflow can branch to execute different steps.

Options	Description
Collect parameters from initiator	Selecting the option to collect parameters from the initiator will allow the initiator of the workflow to define the parameters, rather than having them set by the workflow template.
Instructions for initiator	Instructions for initiator will help the workflow initiator understand the meaning of the parameters for the workflow step. For example, "Please enter your direct manager as an approver of this expense report".
Participant instructions	Participant instructions will appear in the task screen for the user in which the task is assigned. This will help the user understand the purpose of the review or approval. For example, "Please approve this expense report."
If the following users approve/review in	Serial / Parallel. If you select Serial, the tasks generated in this step will be executed sequentially, one after the other. In this case, the previous task must complete before the next task starts. If you select Parallel, then all tasks will be started at the same time.
Add Participant	Select a user who will be responsible for the task. Once the workflow reaches this task, the user you have selected will see the task in their Tasks tab. Depending on whether or not the task is mandatory or option, the user may or may not be required to take action.
Define the participant type and if it is mandatory or optional	If the participant (user) is defined as mandatory, a serial workflow will not progress until the participant has completed their task. If the participant (user) is defined as optional, a serial workflow will progress after a task's due date has passed, even if the participant has not completed that task. When using a workflow which has

	parallel tasks, the workflow will not continue until all mandatory participants have completed their tasks. If there are no mandatory participants in the parallel tasks, then the workflow will proceed either after all tasks are complete or after all due dates have passed.
Define task length and due date.	In order to provide expectations for a workflow, define the expected length the task will take or the date by the task must be completed. The due date is relative to the workflow start date. Should the participant assigned to the workflow task (step) not complete the task in the allotted time, the task will show up as Late .

Move File

Move the file to a folder within the Document Manager (Collaboration) space. This step can optionally ask the workflow initiator to specify the destination folder. Frequently this option is used as part of a conditional ELSE/THEN step. For example, if an expense report is approved by a manager, then move it to the "to_accounting" folder.

Options	Description
Collect parameters from initiator	Selecting the option to collect parameters from the initiator will allow the initiator of the workflow to define the parameters, rather than having them set by the workflow template.
Instructions for initiator	Instructions for initiator will help the workflow initiator understand the meaning of the parameters for the workflow step. For example, "Please enter the destination folder for this document".
Destination folder	Define the location within the collaboration space where you would like this file to be moved. You may only move this file to folder locations to which the template owner has access. If there are tasks to follow, be certain that this file is being moved to a location where the next participant will have access. For example, future approvers of the document will require read access to the file.

Copy File

Copy the file to a destination within the Document Manager (Collaboration) space. This step can optionally ask the workflow initiator to specify the destination file path. Frequently this option is used as part of a conditional ELSE/THEN step. For example, if an expense report is approved by the accounting department, then move it to the "process_payment" folder.

Options	Description
Collect parameters from initiator	Selecting the option to collect parameters from the initiator will allow the initiator of the workflow to define the parameters, rather than having them set by the workflow template.

Instructions for initiator	Instructions for initiator will help the workflow initiator understand the meaning of the parameters for the workflow step. For example, "Please enter the destination path for the copy of this document."
Destination folder	Define the location within the collaboration space where you would like this file to be copied. You may only copy this file to folder locations to which the template owner has access.

Delete File

The file is permanently deleted during this step. This is typically used when creating a conditional THEN/ELSE step such as Approval or Review. Exercise caution, however, as **when you delete a file you also delete the workflow instance as well.**

Add Tag

Add tags to the file that may later be used as search criteria. This step can optionally ask the workflow initiator to specify the tags for the file.

Options	Description
Collect parameters from initiator	Selecting the option to collect parameters from the initiator will allow the initiator of the workflow to define the parameters, rather than having them set by the workflow template.
Instructions for initiator	Instructions for initiator will help the workflow initiator understand the meaning of the parameters for the workflow step. (e.g. "Please enter some terms relevant to that content of this document, which will help users find the document when searching.")
Add tags	Provide tags, or keywords to the file or folder. These tags can be used later as search criteria. Tags are words separated by spaces, you may not use a phrase as a tag. For example, you may tag a file or folder as "BA grades 2007" which will provide the three tags: BA, grades, and 2007. You may not tag a file as "BA grades 2007" as a single tag.

Set Property

Set property is a task which is reserved for the power user or developer. In order to set a property, you must know the value for the property namespace, property name and property value. Xythos will cannot provide this information for you.

Options	Description
Collect parameters from initiator	Selecting the option to collect parameters from the initiator will allow the initiator of the workflow to define the parameters, rather than having them set by the workflow template.
Instructions for	Instructions for initiator will help the workflow initiator understand

initiator	the meaning of the parameters for the workflow step. (e.g. "Please enter the desired property details, and the property will be set accordingly for the target document.")
Property Namespace	Property namespace is a predetermined parameter such as http://www.xythos.com/namespace
Property Name	Property name is a predetermined parameter such as Department and is associated to the Property value as well as the Property namespace.
Property Value	Property value is a predetermined parameter such as Development and is associated to the Property name as well as the Property namespace.

End Workflow

The workflow is ended, similar to having the template owner forcibly end the workflow. This is typically used when creating a conditional THEN/ELSE step such as Approval or Review.

Restart or End

Prompt the workflow instance owner to either restart the instance from the beginning or end the workflow. This is typically used when a file is marked as rejected in an Approval or Review. For example, if approval is denied, then allow the user to either fix the document and restart the workflow; or simply end the workflow.

Options	Description
Instructions	Instructions for initiator will help the workflow initiator understand the meaning of the parameters for the workflow step. For example, "The document has been rejected. See the participant comments in the workflow for more details. You may correct the issue and restart the workflow, or end the workflow now."

Create a new template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click on the **New template** button.
4. Define the required **name** for the workflow template. Optionally provide a description.
5. Using the radio buttons, determine the **workflow owner** as either the workflow template owner, or the workflow initiator.
6. The **last modified** information will be displayed, including the time, date, and display name of the user.

7. You may notify either the Workflow template owner, or the workflow template initiator by using the **Send Notification of Workflow Progress** to drop-down list.
8. Add **Workflow Steps** by clicking the **Add Step** button.
9. Use the above table to determine the steps you would like to add. You may add as many steps as you would like.
10. You may modify the order of the steps by clicking on the up and down arrows.
11. Click the **Save** button.

**Note: You may only select yourself as the owner of the template. You may not assign another user as the owner due to the permission based ownership which follows the template. Every action performed by the workflow will be performed in the security context of the template owner.*

Edit a template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Edit** button associated to the workflow template you wish to modify.
4. You may modify all properties of the workflow template, including the name, owner and description.
5. Add **Workflow Steps** by clicking the **Add Step** button.
6. Use the above table to determine the steps you would like to add. You may add as many steps as you would like.
7. Remove **Workflow steps** by clicking on the **X** button for that step.
8. You may modify the order of the steps by clicking on the up and down arrows.
9. Click the **Save** button.

**Note: You must have Administer privilege on the template in order to perform this action.*

Share a template Sharing a workflow template still requires that the user have the workflow ability.

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Share** button associated to the template you wish to Share.
4. Click the **Add User/Group** button to add users and groups.
When sharing a template, you may designate the permission as either **Use** or **Administrator**.

Use	Administer
<input type="radio"/> Cannot Share the template.	<input type="radio"/> Can Share the template.

<ul style="list-style-type: none"> ○ Cannot Edit the template. ○ Cannot Delete the template. ○ Can Copy the template. Once the template is copied, the user becomes the owner of the new template and may perform any and all actions on the new template. ○ Can Export the template. ○ Can assign the workflow to a file or folder and start the workflow, becoming the owner of that workflow instance. ○ Can stop the workflow instance. 	<ul style="list-style-type: none"> ○ Can Edit the template. ○ Can Delete the template. ○ Can Copy the template. ○ Can Export the template. ○ Can assign the workflow to a file or folder and start the workflow, becoming the owner of that workflow instance. ○ Can stop the workflow instance.
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5. Use the find feature in order to locate the user(s) and/or group(s).
6. Click the **OK** button.
7. Define the permission for each user and/or group using the available checkboxes.
8. Click the **Apply** button.

**Note: You must have Administer privilege on the template in order to perform this action.*

Delete a template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Delete** button associated to the template you wish to delete.
4. You will be prompted **Do you really want to delete the template?**. Select **OK** or **Cancel**.

**Note: You must have Administer privilege on the template in order to perform this action.*

Copy a template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Copy** button associated to the template you wish to copy.
4. Provide a **name** for the copied template.
5. Optionally modify any of the template's properties.
6. Click on the **Save** button.

**Note: If you copy a template, you are also the owner of the copied template.*

Export a template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Export** button.
4. You will be prompted with the following question: **Would you like to include the template sharing settings in the exported template definition?**. Click **Yes** or **No**.
5. Depending on your browser you will either be prompted to open the file, save the file or the file will open or be saved to your default download location.

Import a template

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Import Template** button.
4. Click the **Browse** button to locate an XML file from your local computer.
5. Click the **Import** button.

**Note: If you import a template, you will be the owner of that template.*

Import Workflow Template

You may import workflow templates from other Xythos users, by browsing to the location of the XML file on your local system. If you attempt to upload an XML file which was not created from within the Xythos system, you will receive an error message. If you attempt to import a template which already exists within the system, you will receive an error message. When importing templates, there are several checks and balances in place in order to keep your environment clean.

Import

1. Click on the **Setup** link in the main menu.
2. Click on the **Workflow Templates** tab.
3. Click the **Import Template** button.
4. Click the **Browse** button to locate an XML file from your local computer.
5. By default, the XML file when exported has a name such as "TEMPLATE.00001806.xml".
6. Click the **Import** button.

**Note: If you import a template, you will be the owner of that template.*

When exporting a template, you have the option of including the template sharing settings as well. If this selection was marked as **Yes**, then the newly imported template will carry over the sharing information. For information on exporting a template, visit the [Workflow Templates Editor](#).

Example of a Template XML file to be imported:

```
<template_export>
  <wfs_version>7.0.32.0</wfs_version>
  <metadata>
    <id>TEMPLATE.00001806</id>
    <label>Add Tag</label>
    <description>My Template</description>
  </metadata>
  <structure>
    <![CDATA[<docflow_template notify='false' submitteradmin='false'
    notifywho='TEMPLATE_OWNER'>
    <steps id='0' lastId='13'>
    <step id='4'
    customstep='com.xythos.webview.workflow.extensions.basicfile.AddTagStep'
    params_enabled='true' params_instr='Specify tags which should be added
    to the document(s)']>
```

Xythos User Help

```
<addtag name='tag1 tag2 tag3 tag4 tag5 tag6 tag7 tag8 tag9' /></step>
</steps>
</docflow_template>
  ]]>
</structure>
<acls>
  <acl_item>
    <principal_id>sjones@1:1001</principal_id>
    <admin_priv>Y</admin_priv>
    <published_priv>Y</published_priv>
  </acl_item>
  <acl_item>
    <principal_id>jsmith@1:1101</principal_id>
    <admin_priv>Y</admin_priv>
    <published_priv>Y</published_priv>
  </acl_item>
</acls>
</template_export>
```

Tasks

Tasks are the individual actions that are generated by an active workflow. All of the workflow tasks assigned to you, regardless of which file they are associated with, are displayed under Tasks. Depending on how the workflow was defined, you may or may not be required to take action on a specific task. Additionally, your task may have a deadline. A workflow task will remain in your Tasks list until it either expires or you take action.

Routing and Approval Task Types

Type	Action
Approval	<p>Your choice is either Approve, Reject or Reassign.</p> <p>Approving a document can influence the execution path of a workflow. For example, if a document is approved, then the workflow may execute different steps than if the document were rejected.</p> <p>You may reassign a task to a different user. The task will then disappear from your task list, and appear in the task list of the designated user.</p>
Review	<p>Your choice is either OK or Reassign if you are a mandatory reviewer or OK, Abstain or Reassign if you are optional.</p> <p>Choosing to OK a review means that you have reviewed the document and this allows the workflow to move toward completion. If you don't OK the document, the workflow is delayed until you take action. If you reassign the task, then the task will disappear from your task list, and appear in the task list of the designated user. If there is a due date on the review, you will receive a notice if you do not take action before that deadline. Due dates are relative to the workflow start date.</p> <p>If you are an optional reviewer, you may actively abstain. Abstaining lets the owner know that you are not reviewing the document.</p>
Restart or End	<p>This task gives you the option of restarting a workflow, or ending that flow. Typically this is used in cases such as where a file has been rejected by approvers, giving the user a chance to fix any issues and restart the approval process.</p> <p>If you restart the workflow, the workflow will be restarted from the beginning.</p> <p>If you stop the workflow, no further action is required by any</p>

	participant.
Manage Late Task	<p>If a workflow that you own is late because one or more users have not completed their assigned task before the task due date, the system automatically creates a "Notification of a Late Task" workflow and automatically assigns a "Manage Late Task" task to you.</p> <p>This task is simply a notification and gets deleted once you choose "Delete this Task". You should go to the details of the workflow to further manage the workflow in order for it to continue on a more desirable schedule. If you ignore the task, the workflow remains suspended until you take action.</p>
Error Resolution	<p>This task is created for the workflow instance owner when an error occurs in a workflow. This gives the owner the opportunity to either fix the problem and retry the failed task, or to abort the workflow entirely. For example, if a copy task failed due to permission problems, the task could be retried after the permissions have been fixed.</p>
<i>Custom Workflow Task</i>	<p>The actions of a customized workflow are completely dependent on how that workflow is defined.</p>

Take Action on a Task

1. Click on the **Home** link in the top left main menu.
2. Click on the **Tasks** tab.
3. From within the **Tasks** screen, you may open the document by clicking on the name of the document, or you may perform the task by clicking on the task name.
4. Click on the name of the task for which you wish to take action.
5. In order to complete the task, follow the instructions provided in the task page. Which action you are able to take is dependent on how the workflow was defined.

Reassigning a Task

Some users have the ability to **Administer** the workflow instance, and as such will see additional buttons. Administrators may stop a workflow, or re-assign a task. If any of the following criteria is met, the user may administer the workflow instance:

- The user has the Administer privilege on the Workflow Template from which this Workflow was created.
- The user has the "Administer Workflow" ability assigned to their role.
- The user is the Workflow Initiator, as long as the Workflow Template was set to allow the Workflow Initiator to Administer the Workflow. To determine whether or not the Workflow Initiator has this access, view the

template details. If the Workflow Initiator is listed as having the ability to Administer the Workflow, this cannot be changed on a Workflow which has been started.

Reassign a Task

1. Click on the **Home** link in the top left of the main menu.
2. Click on the **Tasks** tab.
3. From within the **Tasks** screen, click on the task name.
4. For any user whom has Administer permissions on the Workflow, a **Reassign** button will appear in the bottom right corner.
5. The **Find** screen will appear. Use the available options in order to locate the user to which you wish the task reassigned.
6. Select the user or group, and then click **Next**.
7. The task is now assigned to the user or group and is visible in their **Tasks** screen.

Approval Process

Xythos ships one pre-defined workflow template, Approval Process, which is shared to all workflow users by default. The behavior of workflows based on this template depend on the parameters specified when the workflow is started, as well as on input from the users participating in the flow.

Once any Approval Process workflow has been started, the participants of that workflow will receive two forms of notification. First, they will receive an email with a link which leads them to the web view where they can participate. Second, they will receive an item under their **Tasks**. When a participant clicks the email link or clicks the task under **Tasks**, the participant will be presented with a listing of all current tasks. Clicking the name of the file will open the file; clicking the name of the task will provide an opportunity to make comments and select their task option depending on the type of participant:

Participant Type	Possible Actions	Results
Mandatory Approver	Reject/Approve/Reassign	<ul style="list-style-type: none"> • Reject - Any participant rejection returns the workflow to the owner and all other participation is temporarily paused until the owner takes action. • Approve - In a serial workflow, a participant's approval will trigger a request to the next participant to act on the file/folder, or complete the workflow if this is the final participant. • Reassign - The task is reassigned (or passed over) to another user within the system in order to complete the task.
Optional Approver	Abstain/Reject/Approve/Reassign	<ul style="list-style-type: none"> • Abstain - A participant's abstention

		<p>indicates that the participant chooses not to approve or reject the file. An abstention will trigger a request to the next participant to act on the file/folder, or complete the workflow if this is the final participant.</p> <ul style="list-style-type: none"> • Reject - Any participant's rejection returns the workflow to the owner and all other participation is temporarily paused until the owner takes action. • Approve - In a serial workflow, a participant's approval will trigger a request to the next participant to act on the file/folder or complete the workflow if this is the final participant. • Reassign - The task is reassigned (or passed over) to another user within the system in order to complete the task.
<p>Mandatory Reviewer</p>	<p>OK/Reassign</p>	<ul style="list-style-type: none"> • OK - OK indicates that the participant has reviewed the file/folder. In a serial workflow, this will trigger a request to the next participant to act on the file/folder, or complete the workflow if this is the final participant. • Reassign - The task is

		reassigned (or passed over) to another user within the system in order to complete the task.
Optional Reviewer	Abstain/OK/Reassign	<ul style="list-style-type: none"> • Abstain - A participant's abstention indicates the participation chooses not to approve or reject the file/folder. Choosing this will trigger a request to the next participant to act on the file, or complete the workflow if this is the final participant. • OK - OK indicates that the participant has reviewed the file/folder. In a serial workflow, this will trigger a request to the next participant to act on the file/folder, or complete the workflow if this is the final participant. • Reassign - The task is reassigned (or passed over) to another user within the system in order to complete the task.

Owner Intervention

The owner (creator) of an Approval Process workflow may be assigned the special task of "Restart or End". When this task becomes active, the workflow is temporarily delayed until the owner takes action. An owner is assigned this task if the file or folder is rejected by a participant.

Once the owner is assigned this task, the owner can choose to either restart the workflow or to end the Approval Process workflow. If the owner restarts the workflow, the workflow will be restarted from the beginning. If the owner ends the

workflow, the workflow is considered a complete workflow with a status of "Completed". Within the Workflow details, the task status will show that the user chose to end the workflow. Participants are no longer required to take action.

Workflow Status

Workflows may have one of the following statuses:

Status	Description
Aborted	The workflow is stopped and considered "aborted" if the owner stops it via the Stop icon from "Active Workflows".
Approved	<p>The workflow is considered "approved" if all of the following are true:</p> <ul style="list-style-type: none"> • there was at least one approver participating in the approval workflow • at least one approver approved the file • all mandatory approvers either approved the file or were skipped • all optional approvers either approved the file, abstained, or were skipped • all mandatory reviewers either reviewed the file or were skipped • all optional reviewers either reviewed the file, abstained, or were skipped
Unapproved	<p>The workflow will stop and be considered "unapproved" if all of the following are true:</p> <ul style="list-style-type: none"> • there was at least one approver participating in the approval workflow • all mandatory approvers were skipped • all optional approvers either abstained or were skipped • all mandatory reviewers either reviewed the file or were skipped • all optional reviewers either reviewed the file, abstained, or were skipped
Reviewed	<p>The workflow will stop and be considered "reviewed" if all of the following are true:</p> <ul style="list-style-type: none"> • there were no approvers participating in the approval workflow

	<ul style="list-style-type: none">• at least one reviewer reviewed the file• all mandatory reviewers either reviewed the file or were skipped• all optional reviewers either reviewed the file, abstained, or were skipped
Unreviewed	<p>The workflow will stop and be considered "unreviewed" if all of the following are true:</p> <ul style="list-style-type: none">• there were no approvers participating in the approval workflow• all mandatory reviewers were skipped• all optional reviewers either reviewed the file, abstained, or were skipped

Once completed, Workflows will move into the "Workflow History" page for the owner. When the file with which a workflow is associated is deleted, the workflow will be deleted from the system.

Workflow Template for a folder

Workflows Templates in this screen are associated to the current folder, its sub-folders and files. When a new file or folder is created within this folder, the associated Workflow will be started.

Add a Workflow Template to a Folder

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the folder and select **Manage -> Workflow Template**.
3. Click the **Edit** button.
4. Select the Workflow Template using the drop-down menu if more than one Workflow Template is available. You may only select from the Workflow Templates you have administrative access to. If the drop-down menu is empty, you do not have administrative access to any existing Workflow Templates.
5. Click **Next**.

Edit a Workflow Template on a Folder

Editing this setting will only affect new files and folders.

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the folder and select **Manage -> Workflow Template**.
3. Click the **Edit** button.
4. Select the Workflow Template using the drop-down menu if more than one Workflow Template is available. You may only select from the Workflow Templates you have administrative access to. If the drop-down menu is empty, you do not have administrative access to any existing Workflow Templates.
5. Click **Next**.

Remove a Workflow Template from a Folder

Editing this setting will only affect new files and folders.

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the folder and select **Manage -> Workflow Template**.
3. Click the **Remove** button.

Active Workflows for a File or Folder

Active Workflows in this screen are associated to the current file or folder. In order to view all currently active workflows to which you have access, visit [Active Workflows](#).

View Active Workflows

Within the Active Workflows screen you may manage or stop an active workflow on the current file or folder.

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Active Workflows**.

Manage Active Workflows

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Active Workflows**.
3. Click on the radio box associated to the Active Workflow you wish to Manage.
4. You will now be able to view a snapshot of all activity for this active workflow.
5. *Optional: You may click the **Stop Workflow** button in order to stop the workflow. Or, you may click the **View Template Details** button in order to view the current template details.*

Workflow History for a file or folder

Workflows in this screen are associated to the current file or folder. In order to view all workflows to which you have access, visit [Workflow History](#).

View the Workflow History

Within the Workflow History screen you may see the resulting status of a Workflow and optionally view the summary of the Workflow.

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Workflow History**.

View Summary

1. Navigate to the **Document Manager** screen.
2. **Right-click** on the file or folder and select **Manage -> Workflow History**.
3. Click on the radio box associated to the Workflow you wish to view.
4. You will now be able to view a snapshot of the history of activity for this workflow.
5. *Optional: You may click the **View Template Details** button in order to view the workflow template's details.*

Classification

Classification is Xyθος' solution for managing an organization's documents records in a more regulatory and standardized manner. Classification administrators and users can adhere to organizational policy and standardize the process by which you maintain communication within your company with the use of the following:

- [Document Classes](#)
- [Document Class Properties](#)
- [Retention Rules](#)
- [Permission Templates](#)

The classification module is an optional part of your Xyθος system. Whether the module is enabled is controlled by your system administrator. Functionality within the system is controlled by using roles. Roles are defined by the abilities granted to them. Users can be granted all or partial access to the classification functionality. Therefore, depending on which role you have been assigned to, some or all of the screens described in this help may not be available to you. For more information about how to create a role, refer to [Roles](#).

The following is a list of classification abilities. Use this table as a reference when creating roles within Classification. Note that abilities do not override permissions. Correct permission must also exist in order for the user to perform the ability granted. For example, Classify Files only allows a user to classify files in folders where those users also have write permission.

Ability	Description
Classify Files	Allows the user to add files to classified folders. This includes the ability to define the properties required for the particular document class.
Classify Folders	Allows the user to classify folders. This includes the ability to define the properties required for the particular document class.
Create Document Classes	Allows the user to create document class properties and document classes.
Create Retention Schedules	Allows the user to create a retention rule.
Modify Document Classes	Allows the user to edit document classes after they have been created.
Modify	Allows the user to edit retention rules after they have been

Retention Schedules	created.
Purge Expired Entries	Allows the user to purge expired entries after having tun an expired documents report.
Run Expired Documents Reports	Allows the user to run an expired documents report but does not allow purging of those expired entries.
Set Allowed Document Classes	Allows the user to add a list of document classes that can be used when uploaded files to the folder
Set Retention Schedules	Allows the user to assign a retention rule to a document. Note this is different from Classify Files so if you have a document class that is associated with a particular retention rule, you must have both of these abilities to use that document class on a file.
View Document Classes	Allows the user to view the list of document classes and their properties.
View Expired Documents Reports	Allows the user to view an expired documents report once it has been run.
View Retention Schedules	Allows the user to view a retention rule definition.

Classification Wizard

Classify/Reclassify a File or Folder

1. Select the **Document Class** from the drop-down menu. If you do not have any Document Classes listed, please visit [Document Classes](#).
2. The **owner** will be listed, you may not modify this information.
3. If the file was previously classified, and a retention rule was assigned then the retention rule will also be listed.
4. Click the **Next** button.
5. Set the properties for the document class.
6. Click the **Finish** button.

When re-classifying a file or folder, you must exercise caution as you may change the file's retention rule, permissions and/or owner. For more information on classification, visit [Classification](#).

Document Classes

A document class is a categorization of a particular file which includes properties, as well as an optional retention rule. Document classes can be assigned to folders such that any file uploaded to that folder must be classified according to any of the document classes assigned to that particular folder.

Document classes consist of properties and a retention rule. You must first add properties before assigning them to a particular document class. To add a property, visit [Properties](#). The same holds true for retention rules. You must first add a retention rule before applying it to a particular document class. To add a retention rule, visit [Retention Rules](#).

New Document Class

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **New Document Class** button.
5. Define the document's required **name**. The **description** is optional.
6. If you wish to apply a **retention rule** to the document class, you must first define it under Retention Rules. You may then use the drop-down window on the document class screen in order to apply the retention rule to this new document class.
7. You are given a list of all existing properties and may apply one or more of them to the document class.
8. Use the **>** and **<** buttons to move the properties between columns. Moving it from **Available Properties** to **Assigned Properties** adds the property to the current template. The reverse order removes the property from the template.
9. You may also make a property mandatory by clicking on the property and then clicking the **Change Mandatory** button. If a property is mandatory, the user must define a value for the property before the resource (file, folder, etc.) can be created.
10. You may also change the order in which properties appear on the screen. Use the **Move Up** and **Move Down** buttons for this purpose.
11. Once you are finished with all changes, click the **OK** button.

Edit a Document Class

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **Edit** icon associated to the document class you wish to edit.

5. You may change any of the class's properties, including the **name** and **description**.
6. Click **OK**.

Delete a Document Class

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Document Classes** tab.
4. Click on the **Delete** icon associated to the document class you wish to delete.

Document Class Properties

Document Class Properties are defined globally and can be applied to any and all document classes. Properties make up the attributes of document classes and also include their own attributes including data type, programmable, and a multi-value option.

Properties must be one of the following data-types:

Option	Description
Text	The length for a short text data type differs per system but a good rule of thumb is to use the text type when your property value will be less than a sentence.
Number	Although no arithmetic will be performed on a property value, you may use the number type when you want the property value to not allow for the entry of any letters.
Boolean (Checkbox)	If a property is boolean, it may have only two states: true or false. Use boolean in cases where your property can be evaluated to Yes/No, True/False, or On/Off.
Date	The date type's value will be entered in the form of day/month/year, DD/MM/YY. When displayed, the format used is the user's date preference setting.
Long Text	Use the long text when the property value is going to be a full sentence or longer.
Decimal	Similar to the number type, however takes a decimal point and digits after the decimal point.

Programmable

The programmable property allows you to add a Java class to define the property. The Java class must expose two methods: one to set the default value on a property, and another to display the programmatic list of values for the property. Values entered for a property designated as programmable, will be validated against the values returned by the programmatic list of values method. If a class property is designated as programmable, it cannot also be multi-value.

Multi-value

If a property is defined as multi-value, classification users can enter multiple values for this property, when applied to a document via the corresponding document class.

New Classification Property

1. Click on the **Setup** link in the top main menu.

2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click on the **New Classification Property** button.
5. Define the classification property's required **name** and **data type**.
Optionally supply a **description**.
6. If you would like the property to be defined by a Java class, enter the class name in the Programmable field.
7. If you would like the property to be a list of values, select **Yes** in the **Multiple Value** drop-down box.
8. Click the **OK** button.

Edit a Classification Property

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click on the **Edit** icon associated to the classification property.
5. Edit the following fields: **Name, Description, Programmable**.
6. If you are editing a classification property which has **Multiple Value** set to yes, then you will also be able to edit the displayed values by clicking **Add Value** or by clicking the **Delete** icon associated to a value.
7. Click the **OK** button.

Make a Classification Property a List of Values

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click on the **New Classification Property** button.
5. Define the classification property's required **name** and **data type**.
Optionally supply a **description**.
6. If you would like the property to be defined by a Java class, enter the class name in the Programmable field.
7. Select **Yes** in the **Multiple Value** drop-down box.
8. Click on the **Edit** icon associated to the new multiple value classification property.
9. Click on the **Add Value** button.
10. **Define** the new value.
11. Click the **Add Value** button for each additional value that you would like to add.
12. Click the **Default** checkbox for the value you wish to set as the default value.
13. Click the **OK** button.

Delete a Document Class Property

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Properties** tab.
4. Click the **Delete** icon associated to the classification property.

Classifying Files

Allowable Document Classes and Class Properties

There are two ways in which you can classify a file:

- **Class Assignment by Folder** - You can assign one or more document classes to a folder such that when a file is uploaded to that folder, the document can be classified by choosing a class from the list of document classes assigned to the folder. This is also referred to as **Allowable Classes**.

Once the classes have been chosen, you can designate a default class such that the specified class is the first choice in document classes when uploading files to that particular folder.

- **Manual File Classification** - You can classify after a file has been uploaded to the system via the file's manage page. This is also referred to as **Class Properties**.

Classifying a file in either manner performs the same exact classification. However, by using allowable classes, you can force other users to choose from a pre-defined list of document classes for that particular folder.

If only one allowable class is listed for a folder, that class is automatically used for classification on every new file uploaded to the folder.

If you do not choose from the list of allowable classes on a folder, and there is no default document class, you will get an error and will not be able to upload that file. If you do not specify values for all mandatory properties for a document class, you will also get an error and not be able to upload that file.

In addition to applying an allowable document class to a folder, you may also specify class properties for the folder itself. That is, you may have a folder "Jsmith" with allowable classes "Flowers", "Trees", and "Leaves". The folder itself may be classified as "Redwood". This means that every file uploaded to, or added to the folder "Jsmith" will be classified as "Flowers", "Trees", or "Leaves"; whereas the folder itself has been classified as "Redwood". Class properties on a folder should not be confused with allowable classes on a folder.

Assign an Allowable Class to a Folder

In order to assign an allowable class to a folder, you must have administer permission on that folder.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to assign an allowable class.
3. **Right-Click** the folder's name and select **Manage -> Allowable Classes**.
4. Click the **Add Document Class** button, to view all available Allowable Document Classes.
5. You are provided with a list of allowable document classes that have not yet been assigned to this folder. Therefore, if you have already assigned all existing allowable document classes to this folder, none will display in this list.
6. Click on the Allowable Document Class(es) you would like to add. If you would like to add multiple classes, use the CTRL or Shift keys during your selection.
7. Select the **Scope** of the change. Using the **radio buttons**, select one of the following options: *Apply the changed document classes to this folder as well as its sub-folders.* Or *Apply the changed document classes to this folder only.*
8. Click the **OK** button.
9. You will now be able to view all Document Classes assigned to this folder. Click the **Apply** or **Exit** button.

Designate a Default Allowable Document Class on a Folder

If you add allowable document classes to a folder, it is important to denote the default allowable document class. If you do not, you will run into problems when using an application other than the web view, e.g. web folders, to add files to the classified folder.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to assign a default allowable document class.
3. **Right-Click** the folder's name and select **Manage -> Allowable Classes**.
4. Place a checkmark in the **Default** box associated to the Allowable Document Class you wish to set as default.
5. Click the **Apply** or **Exit** button.
6. Select the **Scope** of the change. Using the **radio buttons**, select one of the following options: *Apply the changed document classes to this folder as well as its sub-folders.* Or *Apply the changed document classes to this folder only.*
7. Click the **OK** button.

Remove an Assigned Document Class from a Folder

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder for which you wish to remove an allowable document class.
3. **Right-Click** the folder's name and select **Manage -> Allowable Classes**.

4. Place a checkmark in the box associated to the Allowable Document Class you wish to remove.
5. Click the **Remove** button.
6. Select the **Scope** of the change. Using the **radio buttons**, select one of the following options: *Apply the changed document classes to this folder as well as its sub-folders.* Or *Apply the changed document classes to this folder only.*
7. Click the **OK** button.

Classify a File Upon Upload

Once you have assigned the desired document classes to a folder, you may upload a file to that folder and classify the document upon upload.

1. Navigate to the **Document Manager** screen.
2. Navigate to the folder to which you would like to upload a file.
3. Click the **Upload** button.
4. If you have associated more than one **Allowable Document Class** to the folder, you will have a drop-down menu from which to choose the Document Class. If you do not see this drop-down menu, it is because there is only one Document Class for this folder.
5. Select the Document Class, and then press **OK**.
6. You will be brought to the upload screen. Using the **Browse** button, you may browse to the file you would like to upload. You may select as many files as you would like by selecting the **Add File** button.
7. At the bottom of the **Upload** screen, the **Classification Properties** of the selected Document Class are displayed.
8. Fill in all Classification Properties listed as **Mandatory**. All Mandatory items will have an asterisk (*). You may also fill in any additional Classification Properties at this time.
9. Click the **Start Upload** button.
10. When the upload is complete, you will be returned to your **Document Manager**.

Manually Apply Classification to a file or folder

1. Within the **Document Manager** navigate to the file or folder you would like to apply classification to.
2. **Right-Click** the file or folder, and then select the **classify** option.
3. You will be brought to the [Classification Wizard](#) which will guide you through classifying your file or folder.
4. Using the drop-down menu, select the **Document Class**, and then click the **Next** button. If you do not have any available document classes, visit [Document Classes](#) to learn how to create new document classes.
5. Once all **properties** have been entered, click the **Finish** button.
6. You will be brought to your Document Manager screen.

View Classification properties for a file or folder

1. Within the **Document Manager** navigate to the file or folder you would like to view classification properties.
2. **Right-Click** the file or folder, and then select the **Manage -> Class Properties** option.
3. The name of the Document class and all associated properties will be listed.
4. Click the **Exit** button to exit the classification summary screen.

Change Classification properties for a file or folder

1. Within the **Document Manager** navigate to the file or folder you would like to change classification properties.
2. **Right-Click** the file or folder, and then select the **Manage -> Class Properties** option.
3. Modify the properties listed in the **Class Properties** screen.
4. Click the **Apply** button.
5. Click the **Exit** button to exit the Class Properties screen.

Change Classification type for a file or folder

1. Within the **Document Manager** navigate to the file or folder you would like to change classification type.
2. **Right-Click** the file or folder, and then select the **Manage -> Class Properties** option.
3. Click the **Reclassify** button.
4. You will be brought to the [Classification Wizard](#) which will guide you through classifying your file.
5. Using the drop-down menu, select the **Document Class**, and then click the **Next** button.
6. Edit the properties accordingly.
7. Once all **properties** have been edited, click the **Finish** button.
8. You will be brought to your Document Manager screen.

Remove Classification for a file or folder

1. Within the **Document Manager** navigate to the file or folder you would like to remove classification.
2. **Right-Click** the file, and then select the **Manage -> Class Properties** option.
3. Click the **Reclassify** button.
4. You will be brought to the [Classification Wizard](#) which will guide you through removing the classification of your file or folder.
5. Using the drop-down menu, select the **Document Class "None"**, and then click the **Next** button.

6. You will see the message **This file/folder is not classified.**
7. Click the **Finish** button.
8. You will be brought to your Document Manager screen.

Retention Rules

Retention rules define when a document will expire, in the number of days, months, and years. Retention rules are independently created and then can be assigned to a particular document class such that when assigning a document class to a file, the retention rule of the class is applied to the file upon upload.

Retention rules have a name, description, owner, and an expiration date including the option to not expire and make the file permanent. Additionally, retention rules may be assigned a permissions template. For more information about permissions templates, refer to [Permissions Templates](#).

Once a retention rule is applied to a file, the owner of the file is changed to the retention rule owner, the file's permissions are changed to those of the retention rule's permissions template and an expiration date is calculated for the file based on the expiration day, month, year defined for the retention rule from the file's creation date.

Add a Retention Rule

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Retention Rules** tab.
4. Click on the **New Retention Rule** button.
5. Define the retention rule's required **name**.
6. Optionally provide a **description, expiration, permission template** and **owner**.
7. The **expiration date** will be calculated using these options from the time the file is uploaded, i.e. the creation date. If you would like the file to be permanent instead of expiring, place a checkmark in the **No expiration - make document permanent** box.
8. The **owner** defined here will become the owner of the file that is classified using this retention rule. In other words, once a file is uploaded and classified as Document Class A. Any of the retention rules associated with Document Class A may be applied to the file.
9. Click **OK**.

Edit a Retention Rule

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Retention Rules** tab.
4. Click on the **Edit** icon associated to the retention rule you wish to edit.

5. You may change any of the retention rule's properties, including the **name** and **description**.
6. Click **OK**.

Delete a Retention Rule

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Retention Rules** tab.
4. Click on the **Delete** icon associated to the retention rule you wish to delete.

Applying Retention Rules to Files

A retention rule can be applied can be applied to a file in one of two ways:

- **Manually Applying a Retention Rule** - After a file has been uploaded, navigate to the file's **Manage -> Retention** page and apply the retention rule.
- **Applying a Retention Rule through a Document Class** - You can apply a retention rule by classifying a file using a particular document class that has already been assigned a retention rule. To add a retention rule to a document class, edit the document class using the instructions, [Edit a Document Class](#). Once a file is classified, the retention rule will be automatically applied.

Manually Apply a Retention Rule to a File

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Select the **Retention Rule** by using the drop-down menu.
4. Click the **Apply** button.

Change a File's Retention Rule

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Select the **Retention Rule** by using the drop-down menu.
4. Click the **Apply** button.

Overriding a Retention Rule

You can override a file's retention rule to change the expiration date. At any point before the expiration date, you can maintain the same retention rule for a file but change the date it expires.

Change a File's Expiration Date

1. Within the **Document Manager**, **Right-click** on the file.
2. Select **Manage -> Retention**.
3. Click the **Calendar** button, and select the appropriate date.
4. Using the drop-down menu, select the **Time**.
5. *Optionally set the retention as **Permanent** by using the drop-down menu.*
6. Click the **Apply** button.

**Note: Retention rules are different from the Records Management Disposition Rules. Although Records Management is an optional module, it may be enabled for your system. Disposition Rules are more rigorous policies determining the retention of a record and what is to be done with a record once it reaches final disposition. Retention rules retain files according to a certain length of time. Once that time passes, a file's permissions and ownership may be changed. However, the file is not "officially" in final disposition as is the case in Records Management.*

Permission Templates

A permission template is a set of permissions that can be applied to a document. Once you define a set of permissions, they are applied to a file once that file is uploaded as part of document classification.

The Permissions Template consists of a list of users, including the standard pre-defined user groups of "Authenticated Users" and "Public". Each user and group of users defines read, write, delete and administrative permission for that entry.

New Permissions Template

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Permissions Templates** tab.
4. Click on the **New Permissions Template** button.
5. Define the permission template's required **name**.
6. Optionally provide a **description**.
7. Click the **Next** button.
8. Define the appropriate permissions to the **user(s)** and/or **group(s)** listed.
9. To add additional **users** and/or **groups**, click the **Add User/Group** button.
10. To remove **users** and/or **groups**, click the **Remove User/Group** button.
11. Once your list of users is complete, define each of their corresponding read, write, delete, and administer permissions. Keep in mind that these permissions are applied to a file that is classified using this template. The permissions do not actually exist until the file is uploaded and the template is applied.
12. Click the **OK** button.

Edit a Permissions Template's Name and/or Description

1. Click on the **Setup** link in the top main menu.
2. Click on the **Classification** tab.
3. Click on the **Permissions Templates** tab.
4. Click the **Edit** icon associated to the permissions template you wish to edit.
5. Edit the **name** and/or **description**.
6. Click the **OK** button.

Modify a Permissions Template's Entries and Permissions

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Permissions Templates** tab.

4. Click the **Permissions** icon associated to the permission template you wish to edit.
5. Define the appropriate permissions to the **user(s)** and/or **group(s)** listed.
6. To add additional **users** and/or **groups**, click the **Add User/Group** button.
7. To remove **users** and/or **groups**, click the **Remove User/Group** button.
8. Once your list of users is complete, define each of their corresponding read, write, delete, and administer permissions. Keep in mind that these permissions are applied to a file that is classified using this template. The permissions do not actually exist until the file is uploaded and the template is applied.
9. Click the **OK** button.

Delete a Permissions Template

1. Click on the **Setup** link in the main menu.
2. Click on the **Classification** tab.
3. Click on the **Permissions Templates** tab.
4. Click the **Delete** icon associated to the permissions template you wish to delete.

Records Management

About Records Management

Every organization identifies, classifies, archives, and sometimes destroys records according to official regulations, best practices, and its own business rules. Organizations can use Xythos' implementation of Records Management to automate this process. Xythos Records Management is compliant to the Department of Defense 5015.2 specification.

Within the Xythos web view, the Records Management space is used to store a file plan which includes Series, Record Categories, Record Folders, and Records. Disposition Schedules are used to define retention policies which determine how records are maintained in the system and then archived or destroyed. Records' lifecycle are further maintained using vital record reviews, record supersession, auditing and records management search.

In addition to providing the functionality for maintaining and managing records, Xythos' implementation of Records Management includes additional maintenance tools including reporting, email archiving, and exporting.

<input type="checkbox"/>	Name	Media Type	Created By	Owner	Date Filed	Confidentiality Status	Version Number	Size
<input type="checkbox"/>	New Record Folder		John Smith	No User				90.3KB
<input type="checkbox"/>	New Physical Record	text	John Smith	No User	2007-11-01 15:18:08.0	true		1KB
<input type="checkbox"/>	new_frozen_record2.css		John Smith	No User	2007-10-22 14:26:32.0	false	1	5.82KB
<input type="checkbox"/>	new_record1.css		John Smith	No User	2007-10-23 13:15:05.0	false	2	499.5KB

The Record Hierarchy

Records Management is organized in a particular hierarchy. The entire records management hierarchy, along with its security and template definitions, is referred to as the **File Plan**. At the top-level of the file plan are **Series**. Series are the most basic repository of the File Plan and serve to group together common **Record Categories**. Series do not have specific Records Management properties associated with them. **Record Categories** contain both **Record Folders** and **Records**.

By default, Record Categories, Record Folders and Records each have a specific set of properties that are associated with them according to the Records Management DoD 5015.2 specification. Within the system, the set of properties associated with each item is defined as a **Template**. Any item within the system,

for example a Record, will have a template definition. The templates define required properties, user-defined properties and the corresponding property type.

Record Categories can have a **Disposition Rule** associated with them. Disposition Rules are definitions of retention policies. Records and Record Folders are archived or destroyed according to a **Disposition Schedule** which is a specific instance of a Disposition Rule. Record Folders contain records and those records are retained according to the parent record folder's disposition schedule.

Records are files that have been entered into the Records Management system with all required Records Management properties. Records are retained in the system until they reach their **Final Disposition**.

**Note: Records are a special type of file. Series, record categories, and record folders are special types of folders. Therefore, all file collaboration properties and functionality apply to records and all folder collaboration properties and functionality apply to series, record categories, and record folders.*

Disposition

Disposition is a tool for information lifecycle management. A disposition rule is a retention policy to archive and destroy records according to operational needs and procedures. Specific to this system, a disposition rule is defined as a particular cut-off criteria and the corresponding disposition phases. Each disposition phase consists of steps that must be performed in a particular order with a final disposition action. In order for a record to complete the steps defined for the phase, a user, with the correct abilities, must *trigger* the event or task defined for that step. Users trigger tasks under **Tasks** in the Records Management space.

Once all steps are completed, the record enters its final disposition. Final disposition transfers the record, accedes the record, or deletes the record. After the record goes through its final disposition action, the history of the record along with its properties, also known as metadata, is maintained in the system. Note the content of the file itself is not kept.

Converting Email to Records

Records Management offers you the ability to make a record from an email message. Under the **Email** tab in the Records Management space. You will need to configure your system properly in order to pull certain email messages from your email client into your web view account. Once the email messages are pulled into the system, you can make the message and/or its attachments into a record.

Roles & Abilities

In order to perform functions within Records Management, you must have the **ability** to perform that function. Abilities are grouped together into **Roles**. Users

are then assigned to roles which determines what functions within the system the user may perform. Roles work in conjunction with file and folder permissions. Therefore, you must have both the correct abilities and the correct access permissions to view and/or make changes to a particular records management object. For example, you must have the *Create Record* ability and read/write access to a particular record folder in order to add a record into the system.

Reports

There are several types of reports available within the system that can be used to report Records Management data. All reports are exported to a comma separated value (csv) file. Reports can be based on records, record folders, record categories, deleted records, roles, the entire file plan, disposition rules or total number of records. Once the report is run, you can import its resulting .csv file into the report formatting application of your choice.

There are also special types of reports called **Audits**. An audit reports activities within the system against series, record categories, record folders, records, disposition rules, users, groups, roles, and abilities. Audits can only be run against activities that are currently being logged.

Records Management File Plan Hierarchy

Records Management is organized in a particular hierarchy. The entire records management hierarchy, along with its security and templates, is referred to as the **File Plan**. You can navigate between your records management repository and your file collaboration repository using your default bookmarks.

- Navigate to the Records Management repository by clicking on the **Records Manager** link in the top left main menu.
- Navigate to the file collaboration repository by clicking on the **Home** link in the top left main menu.
- You may also bookmark series, record categories, and record folders as well as collaboration folders. Therefore, you may also use specific bookmarks to navigate between the two repositories.

At the top-level of the file plan are **Series**. Series are the most basic repository of the File Plan. Series do not have specific Records Management properties associated with them but simply serve as the parent folder for **Record Categories**. **Record Categories**, **Record Folders** and **Records** each have specific properties associated with them. These default properties are those required by the DoD 5015.2 specification. Properties can be edited by navigating to the particular record, record folder, or record category and **Right-clicking** on that resource and then selecting **Manage**.

Record Categories can be used to organize records based on their specific lifecycle. Record Categories can be assigned a specific [Disposition Rule](#). Every subsequent record folder or record added to that category is assigned an instance of that disposition rule, referred to as a **Disposition Schedule**. Record Categories can also be used to organize confidential records and vital records.

Records Folders allow you to manage all related records in one folder, at the same time, in the same manner. Record Folders can also be used to manage vital records.

The screenshot shows the Xythos Records Management interface. The breadcrumb path is 'Records Management > New Series > New Record Category'. The interface includes a search bar and a toolbar with various actions like Copy, Move, Delete, Rename, Manage, Share, Email, New Series, New Record Category, New Record Folder, New Record, New Physical Record, Transfer In, and View. Below the toolbar is a table listing records:











<input type="checkbox"/>	Name	Media Type	Created By	Owner	Date Filed	Confidentiality Status	Version Number	Size
<input type="checkbox"/>	New Record Folder		John Smith	No User				90.3KB
<input type="checkbox"/>	New Physical Record	text	John Smith	No User	2007-11-01 15:18:08.0	true		1KB
<input type="checkbox"/>	new_frozen_record2.css		John Smith	No User	2007-10-22 14:26:32.0	false	1	5.82KB
<input type="checkbox"/>	new_record1.css		John Smith	No User	2007-10-23 13:15:05.0	false	2	499.5KB

4 items | Total size: 595.7KB (Storage Quota: None, Available: No Limit)

Your Records Management File Plan should be established according to your particular business needs. You may create the hierarchy of Series, Record Categories and Record Folders and then add Records to the system where appropriate.

Records Management Icons

Records Management uses various icons to indicate where in its lifecycle records and record folders are. The following table summarizes the meaning of each icon:

Icon	Description
	Standard record folder, the record folder is either in disposition or there is no disposition schedule assigned to it.
	Frozen record folder, the record folder is currently in its disposition phase. However, the disposition schedule has been frozen. The record folder disposition schedule must be unfrozen for the record folder to continue to final disposition.
	Record folder awaiting final disposition. The record folder has reached its final disposition and now requires a user to dispose of it.
	Disposed record folder, the record folder reached its final disposition and was deleted, transferred or acceded. However, the record folder's metadata remains in the system.
	Standard record, the record is either in disposition or there is no disposition schedule assigned to it.
	Record made from email, the record was created from an email message, an email message's attachment, or both.
	Physical record, there is no digital file associated with the record. It merely represents a physical file.
	Frozen record, the record is currently in its disposition phase. However, the disposition schedule has been frozen. The record disposition schedule must be unfrozen for the record to continue to final disposition.
	Records awaiting final disposition. The record has reached its final disposition and now requires a user to dispose of it.
	Disposed record, the record reached its final disposition and was deleted, transferred or acceded. However, the record's metadata remains in the system.

For more information about the properties of each particular Records Management object, refer to the links below:

- [Record Categories](#)
- [Record Folders](#)
- [Records](#)

Records Management Templates

Templates identify which properties are defined for each Records Management resource. Each template is populated with a certain set of properties. These templates are automatically created in the system and, by default, include the exact Records Management Department of Defense 5015.2 specified metadata. Although, these properties may be removed from the templates, use caution in doing so as some properties are attached to certain business logic within the system. Additionally, user-defined properties may be added.

There are 6 types of Records Management templates:

- **Record Template** - The list of properties which must be defined for a file in order to make it a record. A list of properties for this template can be found under [Record Properties](#).
- **Record Folder Template** - The list of properties which must be defined for a folder in order to make it a record folder. A list of properties for this template can be found under [Record Folder Properties](#).
- **Record Category Template** - The list of properties which must be defined for a folder in order to make it a record category. A list of properties for this template can be found under [Record Category Properties](#).
- **Accede To NARA Template** - The list of properties which must be defined for a record in order to accede it. A list of properties for this template can be found under [Disposition Tasks](#).
- **Email Record Template** - The list of properties which must be defined for an email message in order to make it a record. A list of properties for this template can be found under [Email Records](#).
- **Physical Record Template** - The list of properties which must be defined for a physical file in order to make it a record. A list of properties for this template can be found under [Record Properties](#).

These templates are the default that exist in the system. You may not add any other templates.

Each template has a corresponding **Edit template_name** ability. Therefore, to edit any of these templates, you must have the corresponding ability.

Edit an existing template

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.

3. Click the **Templates** link.
4. Click the **Edit** icon corresponding to the template you wish to change.
5. Use the **>** and **<** buttons to move the properties between columns. Moving it from **Available Properties** to **Assigned Properties** adds the property to the current template. The reverse order removes the property from the template.
6. You may also make a property mandatory by clicking on the property and then clicking the **Change Mandatory** button. If a property is mandatory, the user must define a value for the property before the resource (record, record folder, etc.) can be created.
7. You may also change the order in which properties appear on the screen. Use the **Move Up** and **Move Down** buttons for this purpose.
8. Once you are finished with all changes, click the **OK** button.

Once you add a property to a template, that property can be defined for the corresponding template's object. For example, if you add a new property to the record template, when you add a new record to the system, that property will be displayed on the Create Record page.

Record Category Properties

Record Categories can be used to organize records based on their specific lifecycle. Record Categories can be assigned a specific [Disposition Rule](#). Every subsequent record folder or record added to that category is assigned an instance of that disposition rule, referred to as a **Disposition Schedule**. Record Categories can also be used to organize confidential records and vital records.

By default, Xythos Records Management includes a list of properties to be defined (both optional and mandatory) for every record category created in the system. It is possible to add additional property requirements as well. Below is a list of the default properties. Keep in mind, if the record category template for your system has been modified, this list may not be the same as you see on the screen:

Attribute	Description
Record category name	A word or a combination of words by which the record category is identified.
Disposition Rule	The disposition rule assigned to a record category is inherited by all record folders and records created in this record category. Once the disposition rule is applied, it becomes the disposition schedule for the corresponding record or record folder. Disposition schedules are the policies for how records and record folder are maintained within the system. For more information, refer to Disposition Rules .
Record category identifier	The alphanumeric or numeric identifier indicating a unique record category. This must be a unique ID and if left blank will be created automatically by the system.
Record category description	Descriptive information beyond the record category's name that explains for what this record category should be used.
Permanent record indicator	Records appraised as having sufficient historical or other value to warrant continued preservation.
Disposition authority	The name or user id of the person legally authorized to transfer or accede records or to carry out the disposal of temporary records.
Vital record indicator	Vital records are essential to the continued functioning of an organization. They represent the more critical operations, related policies or procedural records within an organization and therefore require periodic review. Some examples include accounts receivable records, social security records, payroll

	records, retirement records, and insurance records. Because Vital Records require periodic review and update, when you enable the indicator, you must also define the vital record review and update cycle periods. For more information, refer to Vital Records .
Vital record review and update cycle period	The interval of time between reviews.
Vital record review contact list	Email addresses of anyone that should be notified when the record is reviewed.
Associated File Plans	If this record category is connected in anyway to another records management instance, those instances should be listed here.
User-defined properties	Users can create their own properties. Customized properties can then be added to any existing template. For more information about user-defined properties, refer to About Properties .

Records Folder Properties

By default, Xythos Records Management includes a list of properties to be defined (both optional and mandatory) for every record folder created within the system. It is possible to add additional property requirements as well. Below is a list of the default properties. Keep in mind, if the record folder template for your system has been modified, this list may not be the same as you see on the screen:

Attribute	Description
Record Folder name	A word or a combination of words by which the record folder is identified.
Unique identifier	The alphanumeric or numeric identifier indicating a unique record folder. This must be a unique ID and if left blank will be created automatically by the system.
Physical Location	A pointer to a record's location. Examples: an operating system path and filename, the location of a file cabinet, or the location of a magnetic tape rack.
Vital record indicator	Vital records are essential to the continued functioning of an organization. They represent the more critical operations, related policies or procedural records within an organization and therefore require periodic review. Some examples include accounts receivable records, social security records, payroll records, retirement records, and insurance records. Because Vital Records require periodic review and update, when you enable the indicator, you must also define the vital record review and update cycle periods. For more information, refer to Vital Records .
Vital record review and update cycle period	The interval of time between reviews
Vital record reviewed date	The last date that the record was reviewed. The next review date is scheduled counting forward
Vital record updated date	The last date that the record was updated.
Closed to future additions	No further documents can be added to this folder. A folder may also be closed as part of its cutoff.

User-definable properties	Users can create their own properties. Customized properties can then be added to any existing template. For more information about user-defined properties, refer to Records Management Properties .
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Record Properties

By default, Xythos Records Management includes a list of properties to be defined (both optional and mandatory) for every record added to the system. It is possible to add additional property requirements as well. Below is a list of the default properties. Keep in mind, if the record template for your system has been modified, this list may not be the same as you see on the screen:

Attribute	Description
Unique identifier	The alphanumeric or numeric identifier indicating a unique record. This must be a unique ID and if left blank will be created automatically by the system.
Subject or title	The principal topic addressed in a record.
Media type	The material or environment on which the record exists, e.g., microform, electronic, paper.
Format	For electronic records, format refers to the computer file format such as jpeg, gif, or Word document. For non-electronic records, the format refers to its physical form: e.g., paper, microfilm, and video.
Originating organization	Official name or code identifying the office responsible for the creation of the document.
Date filed	The date and time that an electronic document was filed in the system and declared a record. This date and time will be assigned by the system at the time the record is added to the Records Management (RM) space.
Publication date	The date and time that the author or originator completed the development of or signed the document. For electronic documents, this date and time should be established either by the author or from the time attribute assigned to the document by the application used to create the document. This is not necessarily the date or time that the document was filed in the RM space.
Date received	The date and time that the document was received which is different than when the document become a record. Also, date received is when the email that the record was made from was received into the user's email inbox.
Author	The author of a document is the person, office or designated position responsible for its creation or issuance. For RM purposes, the author, originator, or creator may be designated as a person, official title, office symbol, or code.

Physical Location	If this is a physical record, denote where the actual hard copy of this record is located.
Unscheduled	Records that do not have a NARA-approved final disposition.
Renditions	Replication that provides the same content but differs from the original record because of storage format, or storage medium.
Related records	You determine which records are related by the terms of your organization's business rules. Once you relate a record with another record, property modifications for one record automatically updates the same property of the related record.
Superseding record	Reference to any record that supersedes this one. A superseding record may also trigger disposition. For more information, refer to Superseding Records .
Superseded Record Contact List	The email address of anyone notified when this record is superseded.
Associated records	You determine which records are associated with this one based upon your organization's business rules.
Supplemental marking list	List of Document markings not necessarily related to classification markings, but which elaborate on or clarify document handling, e.g., "ORCON (Originator Controlled);" Special Access Programs; "RD (Restricted Data)." This may also be used to restrict access to the record. For more information, refer to Metadata-driven Security .
Version Number	The current version of the record. This is different from File Management versioning. Regular file management versioning is disabled and replaced with Records Management versioning. Records Management versioning retains each version within the system as if it were its own record. Each version appears in the folder listing. For more information, refer to Records Management Versioning .
Other Versions	The full path and file name of the other versions of this record. For more information, refer to Records Management Versioning .
User-defined properties	Users can create their own properties. Customized properties can then be added to any existing template. For more information about user-defined properties, refer to Records Management Properties .

Email Record Properties

A special case of a record is one made from an email message. If the email message has attachments, you may also make the record from the email and all of its attachments or from each, individual attachment. Because it comes from an email message or attachment, this record has different properties than a record made from an electronic file. Below is a list of the default properties for this type of record. Keep in mind, if the email record template for your system has been modified, this list may not be the same as you see on the screen:

Attribute	Description
Unique identifier	The alphanumeric or numeric identifier indicating a unique record. This must be a unique ID and if left blank will be created automatically by the system.
Author	Defaults to the author of the original email message.
Subject	Defaults to the subject of the original email message.
Addressees	Defaults to the email addresses of the recipients of the original email message.
Other Addressees	Defaults to the email addresses of the carbon-copied or blind carbon-copied recipients of the original email message.
Format	For electronic records, format refers to the computer file format such as jpeg, gif, or Word document. For non-electronic records, the format refers to its physical form: e.g., paper, microfilm, and video.
Date filed	The date and time that an electronic document was filed in the system and declared a record. This date and time will be assigned by the system at the time the record is added to the Records Management (RM) space.
Publication date	The date and time that the author or originator completed the development of or signed the document. For electronic documents, this date and time should be established either by the author or from the time attribute assigned to the document by the application used to create the document. This is not necessarily the date or time that the document was filed in the RM space.
Date Received	The date on which the original email was received.
Originating organization	Official name or code identifying the office responsible for the creation of a document.
Renditions	Replication that provides the same content but differs from the original record because of storage format, or storage medium.

Superseding record	Reference to any record that supersedes this one. A superseding record may also trigger disposition. For more information, refer to Superseding Records .
Superseded Record Contact List	The email address of anyone notified when this record is superseded.
Associated records	You determine which records are associated with this one based upon your organization's business rules.
Supplemental marking list	List of Document markings not necessarily related to classification markings, but which elaborate on or clarify document handling, e.g., "ORCON (Originator Controlled);" Special Access Programs; "RD (Restricted Data)." This may also be used to restrict access to the record. For more information, refer to Metadata-driven Security .
User-defined properties	Users can create their own properties. Customized properties can then be added to any existing template. For more information about user-defined properties, refer to refer to Records Management Properties .

Records Management Properties

Records Management properties are the metadata available for records, record folders, record categories, email records, physical records, and acceded records. The properties are assigned via the [Records Management Templates](#). Each template has a certain set of default properties. You may add additional properties and then assign them to the appropriate template.

If a property is *required*, when a resource (record, record folder, etc.) is created, that property must be defined before the corresponding object can be created.

Once a property is defined for a resource, that property can be edited through the **Edit RM Properties** page specific to a record, record folder or record category.

Properties have their own attributes. You define these attributes when you create the property. Property attributes include:

Attribute	Description
Name	A meaningful word or phrase to identify the property.
Data Type	text, number, Boolean, date, or long text
Programmable	defined through a Java class. A programmable property may be defined by a custom class or may require a certain ability in order for a user to access that property. A programmable property may also be related to another property. For more information about how to use this feature, refer to Metadata-Driven Security .
Multiple Value	More than one value can be defined for this property. The multiple value type also allows you to add a list of options for those values as well as a default value. Users can then choose from that list of values when creating the property.

Create a new property

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **New RM Property** button.
5. Using the above table, assign **attributes** to the new property.
6. Click the **OK** button.

Define programmable attributes for properties

1. Click the **Setup** link from the main menu.

2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **Edit** icon associated to the property.
5. Select one of the following options: **Constrained by ability value**, **Related record value**, or **Custom implementation class**.
6. Click the **OK** button.

Add values to a new property to create a pick-list property

You may also add a list of values from which the user can choose when the property is defined for a particular object. For example, if you have a *Format* property, you may wish to add value of *text file*, *image file*, *PDF document*, etc.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **Edit** icon associated to the property.
5. Click the **Add Value** button.
6. **Define** the new value.
7. Click the **OK** button.
8. You may continue adding as many values to the property as you wish.
9. Once all values are added, optionally select a **Default** value.
10. Click the **OK** button.

Edit an existing property

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **Edit** icon associated to the property.
5. Modify the existing attributes of the property.
6. Click the **OK** button.

Delete an existing property

You will only be able to delete user-defined properties. Any property which is integrated with the software may not be deleted.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **Delete** icon associated to the property. The property will be immediately removed from the system.
5. Click the **OK** button.

Add a property to a Records Management Template

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Templates** tab.
4. Click the **Edit** icon corresponding to the template you wish to change.
5. Use the **>** and **<** buttons to move the properties between columns. Moving it from **Available Properties** to **Assigned Properties** adds the property to the current template. The reverse order removes the property from the template.
6. You may also make a property mandatory by clicking on the property and then clicking the **Change Mandatory** button. If a property is mandatory, the user must define a value for the property before the resource (record, record folder, etc.) can be created.
7. You may also change the order in which properties appear on the screen. Use the **Move Up** and **Move Down** buttons for this purpose.
8. Once you are finished with all changes, click the **OK** button.

Metadata-Driven Security

The Xythos server provides the capability of connecting the values on a property to the abilities needed to access it. Such a mechanism can be used to simplify security in such a manner that you can limit who can edit a record, record folder or record category's specific metadata using roles and abilities.

Xythos refers to this as **Metadata-driven Security**. You may edit an existing property or create a new property to build this capability into your system.

For simplification purposes, the below instructions use a specific records management property, Supplemental Marking List. The DoD 5015.2 specification uses supplemental marking lists to further restrict the management of records using codes or "document markings". The below instructions describe how to edit the supplemental marking list property such that it meets the requirements of the DoD 5015.2 definition.

Although these instructions are specific to an existing property, you may create a new property and edit it in the same manner for additional metadata-driven security. For information on how to add a new property, refer to [Records Management Properties](#).

Create a property that restricts access using abilities

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Properties** tab.
4. Click the **Edit** icon associated to the **Supplemental Marking List** property.
5. Select the radio button associated to the Programmable option **Constrain by ability value**.
6. Click the **Add Value** button.
7. Select an available **ability** from the drop-down list, or define a new value.
8. Click the **Add Value** button to create a pick list.
9. Continue adding as many values as necessary.
10. Click the **OK** button.

**Note: Every value entered for the pick list will have an accompanying ability with the same name. Unless a user belongs to a role that has the ability corresponding to one of these values, that user will not be able to apply the value. Additionally, users will not be able to view any record for which this property is defined.*

The **Supplemental Marking List** property, by default, is a property of the **Record Template**. However, if using this method on a new property, you will have to add that property to an existing template. For more information on how to edit templates, refer to [Records Management Templates](#).

Create a role for the new abilities

1. Click on the **Setup** link in the main menu.
2. Click on the **Roles** tab.
3. Click on the **New Role** button.
4. Define a **name** and optionally a **description**.
5. Use the **>** and **<** buttons to move the abilities created in the steps above between columns. Moving an ability from **Available Abilities** to **Assigned Abilities** adds the ability to the current role. The reverse order removes the ability from the role.
6. To assign users or groups to this role, click the **Add User** button and find the intended user or group. Repeat this step to assign more users or groups to this role.
7. Click the **OK** button.

Only users who have the corresponding ability will be able to set that value. For example, if a user has abilities A and B but values A, B, C, and D have been defined for the Supplemental Marking List, that user can only set the value to A or B and not C or D. Values A and B are the only values displayed to the user.

Disposition Phases

A disposition phase is a set of steps that a record follows as part of a disposition schedule. The steps are performed in the order in which they are listed. The steps of the phase can be one of three types:

- **Task** - A task can either be an event that will occur or an action that must be taken. An ability must be associated with each task such that only users with the respective ability can perform the action or designate the event as having occurred.
- **Amount of Time Passes** - Records can be held for a defined period in days, months, and years. Once a record enters disposition, it will be held in its current state until the hold time completes.
- **Superseding record** - A record can also be held until it is superseded by another record.

Disposition phases consist of one or more steps. Once a record reaches cut-off (Cut-off is simply the event or date when a record begins its disposition.), it begins disposition and steps through each step of the phase. Once a record has gone through all disposition steps, it reaches that phase's final disposition. Final disposition can be:

- **Accede to a specific location** - Physical and legal transfer of a record to an archival institution. When the record is acceded, that archival institution becomes the new owner of the record. Depending on where a record is acceded to, certain properties may require definition in order to complete accession. Those properties are defined under [Final Disposition](#).
- **Delete** - The record itself is deleted. However, the record's properties and history will remain in the system.
- **Transfer to a specific location** - Transfer is similar to accession, however it does not transfer ownership of the record.

You must create all necessary phases first. After the phases exist, you can use them to build a disposition rule. Phases can be reused in multiple disposition rules.

Note that a disposition rule can have multiple phases. Phases occur at the same time. Therefore, at any time, a record may be in multiple phases and therefore at various stages of those phases. In other words, a record can be stepping through various steps at the same time.

Creating, editing, and deleting phases requires the current user already have the **Modify Disposition Rules** ability.

Create a new disposition phase

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Phases** tab.
4. Click the **New Phase** button.
5. Define a **name** for the disposition phase, optionally provide a description.
6. Click the **Next** button.
7. Add a step to the disposition phase by selecting one of the **radio buttons** based on the above options.
8. Click the **Add Step** button in order to add multiple steps.
9. Click the **Add Final disposition** button in order to define the final action.
10. Select the Final disposition action based on the above options.
11. Click the **Next** button.
12. Verify the Disposition Phase settings. Click the **Save** button.

Note: Repeat the above process for all required phases **before creating disposition rules.*

Edit an existing disposition phase

Before you edit a phase, the system warns you which disposition rules and which record categories will be affected by the edits. Keep in mind that the categories affected may contain certain records already in their retention periods and therefore, stepping through the disposition phase you are attempting to edit. Disposition phases should be edited with caution to allow records to step through the correct disposition steps and reach their final disposition. In most cases, you should only edit a phase to correct a previous mistake. If you do proceed with the edit, any record or record folder currently in its disposition will be frozen. You must then unfreeze all affected record folders and records.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Phases** tab.
4. Click the **Edit** button associated to the disposition phase you wish to edit.
5. The rules and categories affected by the changes in the disposition phase will be listed. Click the **Yes** button to edit the disposition phase, or click the **No** button to cancel changes.
6. Modify the **name** and **description**.
7. Click the **Add Step** button in order to add phases, click the **Delete** button associated to the step you would like to remove.
8. Use the **arrows** in order to modify the order of steps.
9. Modify the **Final Disposition** by using the available radio buttons.
10. Once all changes are complete, click the **Save** button.

Delete an existing disposition phase

As with editing a phase, deleting the phase may affect one or more disposition rules and therefore one or more record categories. If there are records within those specific categories that are currently in their retention period, deleting a phase may cause problems. The record or record folder will be in a state of disposition with no defined disposition schedule. Therefore, it will not reach final disposition until a new disposition schedule is assigned to it. Therefore, use caution when deleting a phase.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Phases** tab.
4. Click the **Delete** button associated to the disposition phase you wish to remove.

Disposition Rules

A disposition schedule is a plan for the management of records and how long they should be retained in the system. The amount of time a record is kept is called its retention period. The purpose of a disposition schedule is to provide continuing authority to dispose of, transfer, or archive records once its retention period ends.

A disposition rule is the definition of when a file begins its retention period, what that retention period is based on and the final disposition action for a record once its retention period is over. When that rule is applied to a record (or record folder), it becomes that record's disposition schedule.

Disposition rules are made up of cutoff and disposition phases. Cutoff determines when a record enters its retention period. The disposition phases define how long a record's retention period is and what its final disposition action is. Final disposition is what is done with the record once its retention period is over.

Cut-off is the beginning of the disposition phases. It can be any of the following criteria. If you choose multiple criteria, you may designate whether all criteria be met or any of the criteria be met:

- When the record is submitted - This is essentially no cut-off. The record begins its retention policy as soon as it is uploaded to the system.
- When a particular task occurs - A task may either be something that a particular person performs or an event that a particular person determines as having occurred.
- A specific date - This is a one-time occurrence.
- A time interval - This represents a regular occurrence of cut-off that happens on a date that occurs every month (monthly), every three months (quarterly), or every year(annually).
- At the end of the fiscal year - The end of the fiscal year is defined by your administrator.
- This record is superseded by another record.

Once a record reaches cut-off, it begins its retention period. The record is kept in the system according to the definition of the phases that make up the disposition rule. For more information about phases, refer to [Disposition Phases](#).

Creating, editing, and deleting rules requires the current user already have the **Modify Disposition Rules** ability.

Create a new disposition rule

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Rules** tab.
4. Click the **New Disposition Rule** button.
5. Define a **name** for the disposition rule, optionally provide a description.
6. Click the **Next** button.
7. Next, define cutoff using the following options:

Option	Description
When the record is submitted (no cut-off)	The record will not be cut-off. If this option is selected, you will not be able to add additional cut-off criteria.
When this task occurs	Cut-off will occur based on new or existing abilities. Define a name for the task, then select either Existing ability (Only users with this ability can perform this task), or select New ability and provide a name.
On this Date	Cut-off will be determined by a predefined date.
Using this interval of time	Cut-off will be determined based on a defined recurring date.
Using this span of time	Cut-off will be determined based on a specified amount of time in years, months and days.
On the end of the fiscal year	Cut-off will occur at the end of the fiscal year.
This record is superseded by another record.	Cut-off will occur once the record is superseded.

8. Click the **Add More Cut-off Criteria** button in order to add additional cut-off criteria.
9. Optionally select one or more **Disposition Phases** you wish to step the record through. Disposition phases occur simultaneously, so the order in which you select them does not matter.
10. Click the **OK** button.
11. Verify the disposition rule settings.
12. Click the **Save** button.

Edit an existing disposition rule

Before you edit a rule, the system warns you which disposition rules and which record categories will be affected by the edits. Keep in mind that the categories affected may contain certain records or record folders already in their retention periods and therefore, stepping through the disposition schedule that has been defined by the rule you are attempting to edit. Disposition rules should be edited with caution. In most cases, you should only edit a rule to correct a previous mistake. If you do proceed with the edit, any record or record folder currently in its disposition will be frozen. You must then unfreeze all affected record folders and records.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Rules** tab.
4. Click the **Edit** button associated to the disposition rule you wish to edit.
5. The categories affected by the changes in the disposition rule will be listed. Click the **Yes** button to edit the disposition rule, or click the **No** button to cancel changes.
6. Modify the **name** and **description**.
7. Click the **Change Phases** button in order to add or remove phases by using either the **Add Phase** button, or by selecting the **Delete** button associated to the Phase that you would like to remove.
8. Click the **Change Cut-Off** button to add additional criteria, or delete criteria by selecting the **Delete** button associated to the Cut-off criteria you wish to delete.
9. Once all changes are complete, click the **Save** button.

Delete an existing disposition rule

As with editing a rule, deleting a rule may affect one or more record categories. If there are records or record folders within those specific categories that are currently in their retention period, deleting a rule may cause problems. The record or record folder will be in a state of disposition with no defined disposition schedule. Therefore, it will not reach final disposition until a new disposition schedule is assigned to it.

1. Click the **Setup** link from the main menu.
2. Click the **Records Management** tab.
3. Click the **Disposition Rules** tab.
4. Click the **Delete** button associated to the disposition rule you wish to delete.

Apply a disposition rule to a record category

1. First, you must make sure the user logging into the web view has the **Create Disposition Schedules** and **Modify Record Categories** abilities.
2. As that user, log into the web view.

3. In the main menu, select the **Records Manager** link in the far left corner.
4. Navigate to the Record Category to which you wish to assign a Disposition Rule.
5. **Right-click** the Record Category, and select **Manage -> Records Management**.
6. Within the Records Management manage screen, click on the **Edit RM Properties** button.
7. Click the **Find Disposition Rule** in order to locate and assign a disposition rule.
8. Click the **Radio Button** to the left of the appropriate **Disposition Rule**.
9. Click **OK**
10. You will be brought back to the Records Management manage screen, where the new Disposition Rule will be listed to the right of **Disposition Rule**.

Keep in mind that all records and record folders within this record category will be assigned a disposition schedule based on this disposition rule.

Freeze a disposition schedule for a record or record folder

1. First, you must make sure the user logging into the web view has the **Modify Disposition Schedules** and **Modify Record Folders** or **Modify Records** abilities.
2. Click on the **Records Manager** link in the main menu, in the upper left corner.
3. Navigate to the intended record or record folder.
4. **Right-click** the record or record folder.
5. Select **Manage -> Records Management**.
6. Click on the **Disposition Schedule** button.
7. Click the **Freeze** button.
8. You must enter a reason for the freeze.
9. Click the **OK** button.

Perform any tasks or updates that were the cause of the freeze.

Unfreeze a disposition schedule for a record or record folder

1. First, you must make sure the user logging into the web view has the **Modify Disposition Schedules** and **Modify Record Folders** or **Modify Records** abilities.
2. Click on the **Records Manager** link in the main menu, in the upper left corner.
3. Navigate to the intended record or record folder.
4. **Right-click** the record or record folder.
5. Select **Manage -> Records Management**.
6. Click on the **Disposition Schedule** button.

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7. Click the **UnFreeze** button.
8. You must enter a reason for the unfreeze.
9. Click the **OK** button.

Assigning Disposition Rules

A disposition rule is the definition of when a record or record folder begins its retention period, what that retention period is based on and the final disposition action once its retention period is over. Disposition Rules must be assigned to record categories. Once a record or record folder is created within that record category, the record or record folder inherits the disposition rule and in that instance, it becomes the record or record folder's disposition schedule.

Apply a disposition rule to a record category

1. First, you must make sure the user logging into the web view has the **Create Disposition Schedules** and **Modify Record Categories** abilities.
2. As that user, log into the web view.
3. In the main menu, select the **Records Manager** link in the far left corner.
4. Navigate to the Record Category to which you wish to assign a Disposition Rule.
5. **Right-click** the Record Category, and select **Manage -> Records Management**.
6. Within the Records Management manage screen, click on the **Edit RM Properties** button.
7. Click the **Find Disposition Rule** in order to locate and assign a disposition rule.
8. Click the **Radio Button** to the left of the appropriate **Disposition Rule**.
9. Click **OK**
10. You will be brought back to the Records Management manage screen, where the new Disposition Rule will be listed to the right of **Disposition Rule**.

Keep in mind that all records and record folders within this record category will be assigned a disposition schedule based on this disposition rule.

Reports

There are several types of reports available within the system that can be used to report Records Management data. All reports are exported to a comma separated value (csv) file.

A .csv file can be imported into many applications such that Records Management reports can be formatted using tools that were created specifically for reporting. For example, the .csv file can be imported into MS Excel for viewing, formatting, and analyzing the report/audit data.

Keep in mind, most of the reports available in the system contain a comprehensive amount of data. In most cases, a report lists the object on which the report is based as well as all of its properties. Therefore, it is best to use another application for formatting and filtering.

Below is a description of each report available in the system

Report Types

Report	Description
Record	The default record-based report will report all records including their corresponding properties. You may also filter record-based reports on upcoming disposition, upcoming review/update date, date filed, frozen records, records past cut-off, vital records, or records in final disposition.
Record Folder	The default record folder-based report will report all record folders including their corresponding properties. You may also filter record folder-based reports using the same filters as those for records.
Record Category	Reports all record categories and their corresponding properties.
Deleted Record	Reports all records that have been deleted.
Audit	An audit is a special type of report that reports against activities within the system against series, record categories, record folders, records, disposition rules, users, group, roles, and abilities. Audits can only be run against activities that are currently being logged. If an activity is not available for audit, contact your System Administrator to turn logging on for that specific activity.
Role	Reports all roles and the abilities associated with them.
File Plan	Reports all items in the file plan including series, record categories, record folders, records, and their permissions.

Disposition Rule	Reports all disposition rules and disposition schedules.
Total Number of Records	Simply reports the total number of records in the system.

Creating and running reports requires the current user already have the **Run Reports** ability.

Create a report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **New Report** button.
5. Select the report of your choice from the **Report Type** drop-down menu.
6. Click on the **Next** button.
7. Define the required parameters of the selected report.
8. Click the box marked **Save Report** on applicable Reports.
9. Click on the **Run** button.
10. The report will be running in the background, and you will see the report listed on your **Reports** screen.

**Note: Reports may only be viewed/run/deleted by the user who creates them, they are not shared within the Organization.*

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Run an existing Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Run** link.
5. The report will be running in the background.

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Delete an existing Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Delete** button associated to the report you wish to remove.
5. The report will be immediately removed.

Audits

An audit is a special type of report that reports activities within the system against series, record categories, record folders, records, disposition rules, users, groups, roles, and abilities. Audits can only be run against activities that are currently being logged. Therefore, you must first make sure the desired activities are being logged before running any audits. If there is a desired activity that is currently not being logged, contact your system administrator.

In order to run an audit, you must have the **Create Audit** ability.

Create an audit report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **New Report** button.
5. Select **Audit** from the **Report Type** drop-down menu.
6. Click on the **Next** button.
7. Define the required **parameters** of the selected report:

Option	Description
Report Name	The report name appears in the report output.
Save Report	If you would like to save the parameters of this audit and run it again, choose this option.
Report Output Location	This is the path and folder where you would like the report output to be stored.
Report Output File Name	This is the name of the report. Combined with the output location, this is how you will locate your audit output.
Start Date and End Date	You should limit the date range of your audit so that there is not too much data reported back.
Monitor Activity for	You may audit all users or one specific user.

8. Move the desired activities from **Available Activities** to **Monitored Activities**. For a complete explanation of these activities, refer to the list below.
9. Click the box marked **Save Report** on applicable Reports.
10. Click on the **Run** button.
11. The report will be running in the background, and you will see the report listed on your **Reports** screen.

**Note: Reports may only be viewed/run/deleted by the user who creates them, they are not shared within the Organization.*

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Run an existing Audit Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Run** link associated to a report with the **Type** listed as Audit.
5. The report will be running in the background.

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Delete an existing Audit Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Delete** button associated to the report with a **Type** of Audit you wish to remove.
5. The report will be immediately removed.

Available Activities for Auditing

Note these are the default activities available within your system. If programmatic changes have been made to your particular system, more activities may be available. See your WFS administrator if you see an activity in the web view that is not described here.

Activity	Description
Abilities	The system tracks new abilities, deleted abilities and any changes made to existing abilities.
Roles	The system tracks new roles, deleted roles and any changes made to existing roles.
Users	The system tracks new users, deleted users and any changes made to existing users.
Groups	The system tracks new groups, deleted groups and any changes made to existing groups.
Templates	For each template (NARA Submission, Email Record, Physical Record, Record Category, Record Folder and Record), the system tracks any changes made to these templates including all property additions and deletions.
Record Categories	The system tracks new record categories, deleted record categories and any changes made to existing record categories. The system also tracks any time the folder listing of a record category is displayed.
Record Folders	The system tracks new record folders, deleted record folders and any changes made to existing record folders. The system also tracks any time the folder listing of a record folder is displayed.
Records	The system tracks new record, deleted records and any changes made to existing records. The system also tracks any time a record is viewed or any time a record is superseded by another record.
Record Series	The system tracks new record series, deleted record series and any changes made to existing record series. The system also tracks any time the folder listing of a record series is displayed.
Searches	The system tracks whenever a user searches for records, record folders, and record category.
Disposition Rules	The system tracks whenever a disposition rule is created, changed or assigned to a record category.
Disposition Phases	The system tracks whenever a disposition phase is created or changed.

Records

Creating Records

Records are files that have been entered into the Records Management system with all required Records Management properties. Records can be automatically retained in the system by assigning it a disposition rule. Records are retained in the system until they reach their Final Disposition.

When records are entered into the system, certain property definitions are inherited from the record's parent record folder and/or parent record category. Therefore, it is essential that records are added to the correct area within the records management space. Once a record is added to the system, it must adhere to more rigorous management rules than if you had added the file to the collaboration space.

Create a record from a file on your local machine

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the Record Category or Record Folder to which you wish to add a record.
3. Click the name of the desired Record Category or Record Folder.
4. Click on the **New Record** button.
5. If you wish to create more than one record, choose the appropriate choice for **Number of files to upload** from the drop-down menu.

**Note: If you choose to create multiple records, the properties defined will be applied to every record. If you would like to apply different properties per record, you must create them one at a time.*

6. For every record, click the **Browse** button and choose the file from your local machine.
7. Define the properties. An explanation for each of these properties is listed in [Record Properties](#). Properties with an asterisk (*) denotation must be defined or else the record creation will fail. The only exception to this rule is the Unique Identifier. If you leave this field blank, the system will automatically create a unique identifier for you.
8. Click the **OK** button.

Create a record from a file in the Document Management Space

1. Click on the **Home** link in the main menu, in the upper left corner.
2. Navigate to the file, within the Collaboration Space, you wish to make a record.
3. **Right-click** the file, and select the **Manage** option.

4. Click on the **Make Record** button.
5. Click the **Browse** button to find the location in the Records Management space where you would like to create this new record. Once you find the location, click the **OK** button.
6. If you wish to delete the file from the collaboration space once it becomes a record, select **Delete this file from the collaboration space**.
7. Define the properties. An explanation for each of these properties is listed in [Record Properties](#). Properties with an asterisk (*) must be defined or else the record creation will fail. The only exception to this rule is the Unique Identifier. If you leave this field blank, the system will automatically create a unique identifier for you.
8. Click the **OK** button.

Create a record from an email message

You will need to configure your system properly in order to pull certain email messages from your email client into your web view account. For more information configuring this option, refer to [Records Management Email](#)

If your email message has an attachment, you have the choice of making a record from the email only, the email and all attachments, or the attachment only. You can choose to make a record from the email and each attachment by stepping through this process multiple times.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Email** tab.
3. Click on the **Refresh** button to make sure you have your most recent email listing.
4. Select the email you wish to make into a record and click on its email icon or subject line.
5. Click on the **Make Email Record** button.
6. If the record has an attachment, select which item you wish to make a record: the email, the email and all attachments, or an individual attachment.
7. Define the email record properties. An explanation for each of these properties is listed in [Email Record Properties](#). Properties with an asterisk (*) must be defined or else the record creation will fail. The only exception to this rule is the Unique Identifier. If you leave this field blank, the system will automatically create a unique identifier for you.
8. Click the **OK** button.
9. Decide whether you would like to delete the email or not. If this email has attachments and you would like to make the individual attachments into records, select **No**. Selecting **Yes** moves this email to the trash can of your email server. You will then have to empty your trash to permanently remove this email from your email server. Selecting **No** keeps this email in your Mail Server Folder for Candidate Records. If you keep this email, it

will reappear in your email list even though you have already turned it into a record.

Create a physical record

A physical record represents a record that only exist in hard-copy form. There is no digital copy of the record.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the Record Category or Record Folder to which you wish to add a physical record.
3. Click on the **New Physical Record** button.
4. Define the properties. An explanation for each of these properties is listed in [Record Properties](#). Properties with an asterisk (*) denotation must be defined or else the record creation will fail. The only exception to this rule is the Unique Identifier. If you leave this field blank, the system will automatically create a unique identifier for you.
5. Click the **OK** button.


If a disposition schedule exists for the Record Category or Record Folder where you created the record, that record is automatically assigned the corresponding disposition rule.

Transfer In


You may transfer a file from the collaboration space into the Records Management space. This will automatically create a record out of the document management space file while still keeping the original file in the document management space.

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Navigate to the **record category or folder** where you would like to transfer the record into.
3. Click on the **Transfer In** button.
4. Browse to the location of a valid **XML file** which contains the details of an [exported file](#).
5. Click on the **Next** button.
6. Enter the values of the new record, such as Subject and Confidentiality Status.
7. Optionally you may click the **Skip** option to skip entering values into this screen.
8. Click the **Save and Next** to go onto the next record.
9. Continue this process, using **Skip** or **Save and Next** until you have processed all records.
10. The newly transferred records will then be displayed.
11. Click on the **Exit** button.
12. You may browse to the previously selected record category or folder in order to view the new records.
- 13.

Records Management Search

Because of the amount of properties and the potential complexity of a Records Management file plan, there is a special search dedicated to records management. In order to conduct a records management search, you must begin in the records management space. That is, you must start with the file plan folder listing. Once here, the **Expand Search**  button in the main menu launches the records management search. If you are within a collaboration space folder listing, you will not be able to access the records management search.

Building the search criteria is intuitive and based on standard properties, default document class properties, created custom class properties and records management properties. The following options are available:

- **The file or folder name** - Select **equals** or **contains** from the associated drop-down menu. Enter in the desired criteria, as it pertains to the **name** of your record, in the field to the right of the drop-down menu.
- **File content contains** - Enter in the desired criteria as it pertains to the actual **content** of your record.
- **Add More Search Criteria** - You may drill down your search by clicking on the **Expand**  icon to the right of "Add More Search Criteria". From here you may select properties from either a standard properties, default document class properties or created custom class properties. This is where you may also specify a Creation Date in which to search by from within the Standard Properties. Clicking the Add button will allow you to add as many additional criteria as you would like. If you are using the Advanced Search, you will have records management properties from which to select.
- **Conditions** - Select from either **Where all these conditions are met**, or **Where any of these conditions are met**. Search results can be shown based on all criteria having been met, or any of the criteria having been met.
- **Order By** - The order in which the search results are displayed. Select from either **Best Match** or **Most Recently Modified**.




Perform a quick Records Management Search of the current folder

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Type in the search criteria to the left of the **Search Icon**.
3. Click enter and all search results for the current folder will be listed.




Perform a Standard Records Management Search


1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Expand**  button to the right of the quick search field.
3. Select "Standard Search".
4. At least one of the available criteria must have a value.
5. Select **equals** or **contains** from the "File or Folder name" drop-down menu, and then specify the file or folder name.
6. Specify criteria for the **File content contains** field. This field allows you to search all records for specific content.
7. Click the **Expand** icon to the right of "Add More Search Criteria" to select additional standard or document properties, and then click the **Add** button.
8. Select **Where all these conditions are met** or **Where any of these conditions are met** from the drop-down menu in order to restrict your search results.
9. Select **Best Match** or **Most Recently Modified** from the "Order" drop down menu.
10. Click the **Search** button to begin your search.



Perform an Advanced Records Management Search

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Expand**  button to the right of the quick search field.
3. Select "Advanced Search".
4. At least one of the available criteria must have a value.
5. Select "Records, Record Folders and Record Categories", "Records", "Record Folders" or "Record Categories" from the **Search For** drop-down menu.
6. Select **equals** or **contains** from the "Name" drop-down menu, and then specify the file or folder name.
7. Specify criteria for the **Content** field. This field allows you to search all records for specific content.
8. Click the **Add More Search Criteria** button in order to create a more advanced Records Management Search.
9. Within the window which opens, select the desired **Property** from the drop-down menu, and then click the "Add Property" button.
10. Click on the **Save and Add** button in order to add this search criteria and add additional search criteria, or click **Save** when you have completed adding criteria.
11. Select **Best Match** or **Most Recently Modified** from the "Order" drop down menu.
12. Click the **Search** button to begin your search.


Save your Records Management Search results as a file

1. Conduct your search according to the directions above.
2. Click the **Save Search Results** button.
3. Define a name for the file (do not provide a file extension).
4. If you know the exact destination, you may type it in the **Destination** field.
5. If you do not know the destination, click the **Expand**  icon in order to browse both your **Collaboration** space and your **Records Management** space.
6. Click on the appropriate folder.
7. Click the **Ok** button.


Save your Records Management Search

1. Conduct your search according to the directions above.
2. Click the **Save Search** button.
3. Define a name for the Search
4. Click the **Ok** button.

Perform a saved Records Management Search

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Bookmarks and Searches**  icon.
3. From within the **Searches** section, select the Saved Search you would like to run.
4. Click the **Search** button.

Rename or Delete a saved Records Management Search

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Bookmarks and Searches**  icon.
3. From within the **Searches** section, select the **Manage Searches** option.
4. Place a checkmark in the box associated to the saved search.
5. Click either the **Rename** or **Delete** button to perform the appropriate action.
6. Click the **Finish** button.

Records Management Versioning

Records Management Versioning works a bit differently than it does in the Collaboration space. Records Management versioning retains each version within the system as if it were its own record. Each version appears in the folder listing. Versions are visually linked together via:

- **Record Name** - Each version is named with the original version name plus the version number. For example, if the original version is named *record_name.doc*, the additional versions are named *record_name.2.doc*, *record_name.3.doc*, *record_name.4.doc*, etc.
- **Other Versions** - For each record that has additional versions, those versions are listed on the record's manage page under **Records Management**. The name of this property is **Other Versions**.
- **Version Number** - This is the number, in order of creation, of the record version. The original file is given the version number one (1) once a second version is created. The version number corresponds to that of the record name.

Create a new version of an existing record

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the intended record.
3. **Right-click** the record.
4. Select **Manage -> Records Management**.
5. Click the **New Record Version** button.
6. Click the **Browse** button in order to select the **New Record Version** file.
7. The properties are automatically populated with the current version's properties. You may edit these properties. You must also **Browse** to a new file to be the new version of this file. The file name does not matter. It will automatically be changed to the original file's name with the version number appended to it. An explanation for all properties is listed in [Record Properties](#).
8. Click the **OK** button.

Superseding Records

One record may supersede another. When a record is superseded, it is made obsolete by the superseding record. However, the properties, disposition schedule and disposition status remain the same. The goal of superseding one record for another is to essentially replace the record content without disrupting any of the record metadata.

Note that the superseding record must exist as a record in the system. You may not supersede a record with a file from your local machine or the collaboration space. Therefore, verify the superseding record exists in the system before advancing to the next step. If the record is not in the system, refer to [Creating Records](#) in order to add the superseding record.

Superseding a record could also cause that record to go into its disposition schedule. In other words, if the disposition schedule as been designed as such, cutoff can be defined as a record being superseded by another.

Supersede a record

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the intended record.
3. **Right-click** the record.
4. Select **Manage -> Records Management**.
5. Click the **Supersede** button.
6. Click the **Browse** button in order to select the **Superseding Record**.
7. Select the record either through the **Choose a Folder** option, or through the **Choose from among your Bookmarks** option.
8. Click the **OK** button.
9. Click the < button to move the record to the **Superseding record** box.
10. Click the **OK** button.

Disposition Schedule Freeze and Unfreeze

At some point in a record or record folder's lifecycle, it may be necessary to change its retention policy. Whether you want to change the final disposition action or edit disposition phases, the current disposition schedule must be frozen before continuing with the change.

When a disposition phase or disposition rule is changed, all record categories that have been assigned that rule are also updated to reflect the change. As a result, all records and record folders that had a disposition schedule created based on that disposition rule are updated to reflect the change. As such, all record and record folders with that disposition schedule are frozen. Once the change is made, you must unfreeze the disposition schedule for each record or record folder affected.

Freeze a disposition schedule for a record or record folder

1. First, you must make sure the user logging into the web view has the **Modify Disposition Schedules** and **Modify Record Folders** or **Modify Records** abilities.
2. Click on the **Records Manager** link in the main menu, in the upper left corner.
3. Navigate to the intended record or record folder.
4. **Right-click** the record or record folder.
5. Select **Manage -> Records Management**.
6. Click on the **Disposition Schedule** button.
7. Click the **Freeze** button.
8. You must enter a reason for the freeze.
9. Click the **OK** button.

Perform any tasks or updates that were the cause of the freeze.

Unfreeze a disposition schedule for a record or record folder

1. First, you must make sure the user logging into the web view has the **Modify Disposition Schedules** and **Modify Record Folders** or **Modify Records** abilities.
2. Click on the **Records Manager** link in the main menu, in the upper left corner.
3. Navigate to the intended record or record folder.
4. **Right-click** the record or record folder.
5. Select **Manage -> Records Management**.
6. Click on the **Disposition Schedule** button.
7. Click the **UnFreeze** button.
8. You must enter a reason for the unfreeze.
9. Click the **OK** button.

Reverse Cut-off

Cutoff determines when a record enters its retention period. Once a record is cutoff, it begins its disposition phases. However it may be necessary to reverse cutoff in case it was unnecessarily or accidentally cutoff in the first place.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the intended record.
3. **Right-click** the record.
4. Select **Manage -> Records Management**.
5. Click on **Disposition Schedule**.
6. Click the **Reverse Cutoff** button.
7. You must enter a reason for reversing cutoff.
8. Click the **OK** button.

Vital Record Review

A vital record is a record that needs to be maintained but also updated. For example, your company's HR manual should be a record but also requires periodic update as laws and policies change. If you flag a record as vital within the Xythos Records Management system, you can be automatically reminded of when a vital records needs to be updated. The system tracks when the last update occurred and calculates when the next review is needed based on the criteria you define.

In order for a record to be flagged as vital, it must belong to a record category that has been marked for vital records.

Mark a record category for vital records

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the intended record category.
3. **Right-click** on the selected category.
4. Select **Manage -> Records Management**.
5. Click the **Edit RM Properties** button.
6. Select **Yes** for the **Vital Records** drop-down.
7. Enter an interval for days, months and/or years for the **Vital Record Review and Update Cycle Period**. The period represents the amount of time that should pass between each review.
8. To the right of the **Vital Record Review Contact List** option, click the **Find User** button in order to locate users.
9. Use the **>** and **<** buttons to move the user(s) into the **Vital Record Review Contact List** box. The reverse order removes the user from the **Vital Record Review Contact List** box.
10. Click the **OK** button.

Going forward, all records added to this record category will be marked as vital and e-mail notifications will be sent to the designated users when the review deadline for each record occurs.

Tasks

Tasks Overview

Tasks are actions you must take in order to step a document or record through a review, approval or its lifecycle.

Routing and Approvals

Routing and Approvals are the individual actions that form a workflow. A workflow tracks a document through a series of steps that involves one or more user's review and/or approval of that document. Documents can also be routed by customized workflows. Regardless of whether your workflow task requires you to review, approve or to perform some other custom task on a document, it will appear in the list of Routing and Approvals until you complete the task or until the workflow is completed.

For more information, refer to [Routing and Approvals](#).

Disposition Events

A disposition event is a task required to step a record through its retention policy. A record's lifecycle is defined through its disposition schedule. Steps within that disposition schedule may be tasks listed in your Disposition Events list. With each disposition task, there is a particular ability associated with it. You must be assigned that ability in order for the disposition task to appear in your Disposition Events list.

For more information, refer to [Disposition Events](#).

Final Disposition

Final Disposition is the last action taken on a record as part of its retention policy. Final Disposition can be one of three actions:

- **Accede** - When you accede a record, you move that record to a different storage facility or organization. That organization takes ownership of the record. One common accede process moves the record to the US National Archives and Records Administration (NARA).
- **Delete** - Deleting a record destroys the record itself. However, you do have the option to retain the metadata of the record.
- **Transfer** - Transfer is similar to accede in that you are moving a record to a different storage facility or organization. However, the different organization does not take over ownership of the record. Your organization maintains ownership without actually maintaining or storing the record itself.

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Note that you must have the **Trigger Final Disposition** ability in order for Final Disposition tasks to both appear in your list of tasks and for you to be able to perform the task.

For more information, refer to [Final Disposition Tasks](#).

Records Management Tasks

Records Management tasks can either trigger disposition or step a record through disposition. The task itself is simply a description of an event. All tasks are also associated with an ability. In order for a user to be able to trigger a task, they must be assigned that ability. (Abilities are assigned through [roles](#).) Only those tasks for which you have been assigned the corresponding ability will appear in your list of Records Management Tasks.

Tasks are created through Disposition Rules. For a disposition rule, a task may cause cutoff which begins a record's disposition or retention policy. Within a disposition phase, a task can be defined in order to step a record through part of its disposition phase. Both tasks that cause cutoff and tasks that act as steps list within your Records Management Tasks. As you should see, each task is associated with its corresponding record or record folder.

There are two ways you may perform tasks. You may either navigate to the specific record folder or record and trigger any pending tasks. Or, you may go to **My Tasks** from the left menu and choose either [Disposition Events](#) or [Final Disposition](#).

Perform a pending task on a record or record folder

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Tasks** tab.
3. Click on the **Disposition Events** tab.
4. Select the intended record and click the **Do Task** button.
5. Enter a **Date of Occurrence** and enter a **Comment**. Note that both of these are required. If you do not define the date and a comment, the trigger will fail.
6. Click the **OK** button.

For more information about triggering tasks from **Tasks**, refer to either [Disposition Events](#) or [Final Disposition](#).

Disposition Events

Disposition Events step a record through its retention policy. The task itself is simply a description of an event. All tasks are also associated with an ability. In order for you to be able to trigger a task, you must be assigned that ability. (Abilities are assigned through [roles](#).) Only those tasks for which you have been assigned the corresponding ability will appear in your list of Disposition Events.

Disposition events are created through Disposition Rules. For a disposition rule, this type of task may cause cutoff which begins a record's disposition or retention policy. Within a disposition phase, a disposition task can be defined in order to step a record through part of its disposition phase. Both tasks that cause cutoff and tasks that act as steps list within Disposition Events. As you should see, each task is associated with its corresponding record or record folder.

Perform a disposition event/task

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. click on the **Tasks** tab.
3. Click on the **Disposition Events** tab.
4. Choose the intended record and click the **Do Task** button.
5. Add the **Date of Occurrence** by clicking on the calendar icon. The date must be today's date or earlier.
6. Add a **comment**.
7. Click the **OK** button.

Final Disposition

Under Tasks, you will find records that are awaiting final disposition. In order for a record to reach its final disposition state, a user must perform the task. Final disposition actions are:

- **Delete** - The record itself is deleted. However, the record's properties and history will remain in the system.
- **Transfer to a specific location** - Transfer is similar to accession, however it does not transfer ownership of the record.
- **Accede to a specific location** - Physical and legal transfer of a record to an archival institution. When the record is acceded, that archival institution becomes the new owner of the record. Depending on where a record is acceded to, certain properties may require definition in order to complete accession. Those properties are defined below.

You may filter your view of disposition tasks by choosing from the **View Records** drop-down menu. By choosing one of the specific disposition actions, you will only view records that have that specific final disposition action.

Destroy a record

When deleting a record for its final disposition, you have the option to keep the metadata in the Records Management repository.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Tasks** tab.
3. Click on the **Final Disposition** tab.
4. Choose the intended record and click the **Do Task** button.
5. Decide whether you would like to **delete the record's metadata** and select the appropriate radio button.
6. Click the **OK** button.
7. Click the **OK** button again to confirm, be certain to verify the record that is being deleted.

Transfer a record

For records being transferred, a folder is created in the defined export location. Once transferred, the folder will contain the record's metadata and content. You have the option to delete the records from the Records Management repository. If you delete the record, the record content will be removed but the metadata will remain.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Tasks** tab.
3. Click on the **Final Disposition** tab.
4. Choose the intended record and click the **Do Task** button.
5. Browse to the folder to which you wish to export the record.
6. Click the **OK** button.
7. You may also choose to create a sub-folder. If so, select the **sub-folder** checkbox and enter a name for the new sub-folder.
8. Decide whether you would like to **delete the record's metadata** and select the appropriate radio button.
9. If you would like to test the export, you put a checkmark in the box **This is a dry run. Export the records, but do not complete the task..**
Performing a dry run will create the export of metadata and the content but the record is not deleted and its state is not changed to disposed/transferred.
10. Click the **OK** button.
11. Click the **OK** button again to confirm, be certain to verify the destination.

Accede a record

For records being acceded, a folder is created in the defined export location. Once acceded, the folder will contain the record's metadata and content. You have the option to delete the records from the Records Management repository. If you delete the record, the record content will be removed but the metadata will remain.

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Tasks** tab.
3. Click on the **Final Disposition** tab.
4. Choose the intended record and click the **Do Task** button.
5. If required, define the properties as described below and click the **Save and Next** button.
6. Browse to the folder to which you wish to export the record.
7. Click the **OK** button.
8. You may also choose to create a sub-folder. If so, select the **sub-folder** checkbox and enter a name for the new sub-folder.
9. Decide whether you would like to **delete the record's metadata** and select the appropriate radio button.
10. If you would like to test the export, you put a checkmark in the box **This is a dry run. Export the records, but do not complete the task..**
Performing a dry run will create the export of metadata and the content but the record is not deleted and its state is not changed to disposed/acceded.
11. Click the **OK** button.
12. Click the **OK** button again to confirm, be certain to verify the destination.

Properties required for successful accession

Below is a list of the default properties required when acceding a record. Keep in mind, if the accede record template for your system has been modified, this list may not be the same as you see on the screen:

Attribute	Description	Datatype
Official title	The accepted title of the record, is not required to match name of file.	Text
Acronym		Text
Restrictions on access	Instructions on who can and cannot access the archived record.	Text
Description	Include a comprehensive description and location of records to be retained	Text
Electronic format	Indicates whether the record is physical or electronic	Boolean
Agency name and address	The name and address of the agency from which the record is being acceded.	Text or object
Agency contact	The name and/or email of the contact at the agency from which the record is being acceded.	Text or object
Short title on external label	This title will appear on any physical label.	Text
Storage media unit volume serial number	The series number for located the physical record	Text
Density (CPI or BPI)	If the storage media is tape, this is the unit of density.	Number
Return storage media to agency after archiving	After archiving, this attribute says whether or not the physical storage media must be returned to the acceding agency.	Boolean
Address for returned media	If "Return storage media to agency after archiving" is true, this is where the storage needs to be returned.	Text
Type of media (reel, cartridge, other)	This is the type of media used for physically transferring records. Accepted types include magnetic tape, open-reel magnetic tape, CD-ROM, FTP, etc.	Text
Number of tracks	If the transfer media is tape, this attribute	Number

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	should be defined.	
File organization		Text
Recorded label (internal)		Text
Character set	The specific character set of the record, for example ASCII.	Text
Date file copied	The date the record was copied into the archives.	Date
Internal file name or identifier	How the record is identified by the accepting agency.	Text
Sequence of file on storage media	Where the record falls into order within the storage.	Number
Number of logical factors		Number
Record type	The record type could be image, MS Word file, etc.	Text
Length of logical records	The number of pages of the digital record.	Number
Number of logical records	Total number of digital records going into archive.	Number
Length of physical records	Total number of pages of the record	Number
Number of physical records	Total physical records in the accession	Number
Agency comments	Any additional comments added by the acceding agency/organization.	Text
Prepared by	The person defining this list of properties.	Text or object
Phone	The phone number of the Prepared by person.	Text
Date form completed	The date when these properties where defined.	Date

Export

Records Management Export

Within Records Management, it is possible to export part or all of the file plan via the Xythos Export tool. The output of the export includes:

- Records or documents
- Metadata including security and state for all records. The output of this information is a single XML file.
- Optionally, roles, abilities, users and groups, users' passwords, disposition schedules, document classes, and folders.

This tool works by exporting records as well as an XML file representing the metadata and optional objects. The exported content can simply remain exported as a way of backing up information as a means of freeing more space within the system. Or, it may be imported into another system such that the entire system can be duplicated.

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 from the Records Management space

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Reports** 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 the Records Management space. However, you can drill down into any Series, Record Category or Record Folder within the space.
Destination Folder	This is where your content will be copied. You can choose to export the file plan to a folder within the collaboration space or within the Records Management space.
Destination	This is the name of the XML file that will contain

XML Filename	metadata, security information and the other optional 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.
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 Disposition Schedules	Exports all disposition rules, those rules' names and descriptions and their cutoff including task name and ability. Also exports each disposition rule's disposition phases including each phase's name, description, each retention step and the final disposition.
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 able to be deleted 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 writable 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**.

Reports

There are several types of reports available within the system that can be used to report Records Management data. All reports are exported to a comma separated value (csv) file.

A .csv file can be imported into many applications such that Records Management reports can be formatted using tools that were created specifically for reporting. For example, the .csv file can be imported into MS Excel for viewing, formatting, and analyzing the report/audit data.

Keep in mind, most of the reports available in the system contain a comprehensive amount of data. In most cases, a report lists the object on which the report is based as well as all of its properties. Therefore, it is best to use another application for formatting and filtering.

Below is a description of each report available in the system

Report Types

Report	Description
Record	The default record-based report will report all records including their corresponding properties. You may also filter record-based reports on upcoming disposition, upcoming review/update date, date filed, frozen records, records past cut-off, vital records, or records in final disposition.
Record Folder	The default record folder-based report will report all record folders including their corresponding properties. You may also filter record folder-based reports using the same filters as those for records.
Record Category	Reports all record categories and their corresponding properties.
Deleted Record	Reports all records that have been deleted.
Audit	An audit is a special type of report that reports against activities within the system against series, record categories, record folders, records, disposition rules, users, group, roles, and abilities. Audits can only be run against activities that are currently being logged. If an activity is not available for audit, contact your System Administrator to turn logging on for that specific activity.
Role	Reports all roles and the abilities associated with them.
File Plan	Reports all items in the file plan including series, record categories, record folders, records, and their permissions.

Disposition Rule	Reports all disposition rules and disposition schedules.
Total Number of Records	Simply reports the total number of records in the system.

Creating and running reports requires the current user already have the **Run Reports** ability.

Create a report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **New Report** button.
5. Select the report of your choice from the **Report Type** drop-down menu.
6. Click on the **Next** button.
7. Define the required parameters of the selected report.
8. Click the box marked **Save Report** on applicable Reports.
9. Click on the **Run** button.
10. The report will be running in the background, and you will see the report listed on your **Reports** screen.

**Note: Reports may only be viewed/run/deleted by the user who creates them, they are not shared within the Organization.*

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Run an existing Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Run** link.
5. The report will be running in the background.

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Delete an existing Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Delete** button associated to the report you wish to remove.
5. The report will be immediately removed.

Audits

An audit is a special type of report that reports activities within the system against series, record categories, record folders, records, disposition rules, users, groups, roles, and abilities. Audits can only be run against activities that are currently being logged. Therefore, you must first make sure the desired activities are being logged before running any audits. If there is a desired activity that is currently not being logged, contact your system administrator.

In order to run an audit, you must have the **Create Audit** ability.

Create an audit report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **New Report** button.
5. Select **Audit** from the **Report Type** drop-down menu.
6. Click on the **Next** button.
7. Define the required **parameters** of the selected report:

Option	Description
Report Name	The report name appears in the report output.
Save Report	If you would like to save the parameters of this audit and run it again, choose this option.
Report Output Location	This is the path and folder where you would like the report output to be stored.
Report Output File Name	This is the name of the report. Combined with the output location, this is how you will locate your audit output.
Start Date and End Date	You should limit the date range of your audit so that there is not too much data reported back.
Monitor Activity	You may audit all users or one specific user.

for	
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8. Move the desired activities from **Available Activities** to **Monitored Activities**. For a complete explanation of these activities, refer to the list below.
9. Click the box marked **Save Report** on applicable Reports.
10. Click on the **Run** button.
11. The report will be running in the background, and you will see the report listed on your **Reports** screen.

**Note: Reports may only be viewed/run/deleted by the user who creates them, they are not shared within the Organization.*

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Run an existing Audit Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Run** link associated to a report with the **Type** listed as Audit.
5. The report will be running in the background.

From here, you can import the resulting report .csv file into Excel or any other spreadsheet application. Use this application to filter, format and additionally manipulate the data to suit your needs.

Delete an existing Audit Report

1. Click on the **Records Manager** link in the upper left corner of the main menu.
2. Click on the **Reports & Tools** tab.
3. Click on the **Reports** tab.
4. Click on the **Delete** button associated to the report with a **Type** of Audit you wish to remove.
5. The report will be immediately removed.

Available Activities for Auditing

Note these are the default activities available within your system. If programmatic changes have been made to your particular system, more activities may be available. See your WFS administrator if you see an activity in the web view that is not described here.

Activity	Description
Abilities	The system tracks new abilities, deleted abilities and any changes made to existing abilities.
Roles	The system tracks new roles, deleted roles and any changes made to existing roles.
Users	The system tracks new users, deleted users and any changes made to existing users.
Groups	The system tracks new groups, deleted groups and any changes made to existing groups.
Templates	For each template (NARA Submission, Email Record, Physical Record, Record Category, Record Folder and Record), the system tracks any changes made to these templates including all property additions and deletions.
Record Categories	The system tracks new record categories, deleted record categories and any changes made to existing record categories. The system also tracks any time the folder listing of a record category is displayed.
Record Folders	The system tracks new record folders, deleted record folders and any changes made to existing record folders. The system also tracks any time the folder listing of a record folder is displayed.
Records	The system tracks new record, deleted records and any changes made to existing records. The system also tracks any time a record is viewed or any time a record is superseded by another record.
Record Series	The system tracks new record series, deleted record series and any changes made to existing record series. The system also tracks any time the folder listing of a record series is displayed.
Searches	The system tracks whenever a user searches for records, record folders, and record category.
Disposition Rules	The system tracks whenever a disposition rule is created, changed or assigned to a record category.
Disposition Phases	The system tracks whenever a disposition phase is created or changed.

Email

Records Management Email

Records Management offers you the ability to make a record from an email message. Within the Records Management space, there is an **Email** tab. You will need to configure your system properly in order to pull certain email messages from your email client into your web view account. Once the email messages are pulled into the system, you can make any email message or any email message attachment into a record.

Set-up your account to receive email

1. Click on the **Setup** link in the main menu.
2. Click on the **My Settings** tab.
3. Define your **email settings**. For more information about this step, refer to [Email Settings](#)
4. Click the **Apply** button.

Refresh your email

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Email** tab.
3. Click on the **Refresh Email** button.

Make an email into a record

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Email** tab.
3. Select the email you wish to make into a record by clicking on the subject line.
4. Click on the **Make Email Record** button.
5. Define the email record properties as described below.
6. Click the **OK** button.

Reply to or forward an email record

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the email record you wish to forward or reply to.
3. **Right-click** the record and select **Manage**.
4. Click the **Reply** or **Forward** button depending on which action you wish to perform.
5. You will be brought to an email screen.

6. You may edit the email's to, cc, bcc, subject and body as you wish.
7. Click **Send**, or click **Cancel** to cancel the email.

Email Record Properties

Attribute	Description	Required	Datatype
Unique identifier	An element of metadata, a record identifier is a data element whose value is system-generated and that uniquely identifies a particular record.	X	ID
Author	Defaults to the author of the original email message.		
Subject	Defaults to the subject of the original email message.		
Addressees	Defaults to the email addresses of the recipients of the original email message.		
Other Addressees	Defaults to the email addresses of the carbon-copied or blind carbon-copied recipients of the original email message.		
Format	For electronic records, format refers to the computer file format described by a formal or vendor standard or specification, such as ISO-IEC 8632-1 [Information Technology - Computer Graphics - Metafile for the Storage and Transfer of Picture Description Information (CGM)]; ISO-EC 10918 [Joint Photographic Experts Group (JPEG)]; Microsoft Word or Excel. For non-electronic records, the format refers to its physical form: e.g., paper, microfilm, and video.		Text
Date filed	The date and time that an electronic document was filed in the RMA and declared a record. This date and time will be assigned by the system at the time the record is filed in the RMA.	X	Date
Publication date	The date and time that the author or originator completed the development	X	Date

	of or signed the document. For electronic documents, this date and time should be established either by the author or from the time attribute assigned to the document by the application used to create the document. This is not necessarily the date or time that the document was filed in the RMA.		
Date Received	The date on which the original email was received.		
Originating organization	Official name or code identifying the office responsible for the creation of a document.		Text
Renditions	Replication that provides the same content but differs from the reference because of storage format, or storage medium.		Array of text
Superseding record	Reference to any record that supersedes this one. A superseding record may also trigger disposition.		Array of records
Superseded Record Contact List	The email address of anyone notified when this record is superseded.		Array of text or userids
Associated records	You determine which records are associated with this one based upon your organization's business rules.		Array of records
Supplemental marking list	List of Document markings not necessarily related to classification markings, but which elaborate on or clarify document handling, e.g., "ORCON (Originator Controlled);" Special Access Programs; "RD (Restricted Data)." This may also be used to restrict access to the record.		Array of Text/Policy

You may add your own defined properties but you may not edit or remove the default properties of this Records Management Template. To learn about editing Records Management Templates, visit [Records Management Templates](#).

Records Management Email Integration Settings

Records Management allows you to make records out of email messages. In order to pull messages in from your email account, you must configure your Records Management Email settings correctly.

Once you configure your email settings, click the **Email** tab. Once in the **Email for Candidate Records** screen, click the **Refresh** button and all of the email messages in your **Email Server Folder for Candidate Records** will be copied from the folder to your Records Management system. Note that the messages are not instantly made into records. Read more about making email message in records under [Email Records](#).

Set or change one of your Email Settings

1. Click on the **Setup** link in the main menu.
2. Click on the **My Settings** tab.
3. Click on the **Email Settings** link.
4. Using the table below, edit your **email settings**.
5. Click the **Apply** button.

Email Settings

This section contains your email settings, which are used throughout the system.

Option	Description
Email Address	This is the email address which will receive all notifications for your account, is used when searching for users, and for all email functionality throughout the system. Be certain to verify your email address as there is not an option to test the address.
Method for Emailing Other Users	This option 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 "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending emails.

Records Management Email Integration Settings

Option	Description
Email Server	This is the name of your email account server. If you use MS Exchange, the format should be exchange.company_name.com. For other mail servers, enter the name of the Incoming mail server. If you do not know the name of your mail server, contact your system administrator.
Email Server Account Address	This is the account name for your email account.
Email Server Account Password	This is the password for your email account. This is NOT your web view password.
Email Server Folder for Candidate Records	This is the folder within your email account that holds the email messages you wish to turn into records. Once you refresh your Email screen by clicking on your Email bookmark and then clicking the Refresh button, all email messages from this folder will appear in the system. From there, you can make the message a record.

You may select the checkbox **Always delete email from server after it is made into a record**. This will remove all email from your inbox once the email has been put into Xythos as a record.

Refresh your email

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Click on the **Email** tab.
3. Click on the **Refresh Email** button.

Reply to or forward an email record

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the email record you wish to forward or reply to.
3. **Right-click** the record and select **Manage**.
4. Click the **Reply** or **Forward** button depending on which action you wish to perform.
5. You will be brought to an email screen.

6. You may edit the email's to, cc, bcc, subject and body as you wish.
7. Click **Send**, or click **Cancel** to cancel the email.

Export an email record back to your email account

1. Click on the **Records Manager** link in the main menu, in the upper left corner.
2. Navigate to the email record you wish to export.
3. **Right-click** the record and select **Manage**.
4. Click the **Export to mail folder** button.
5. Using the drop-down menu, select the mail folder to which you wish to export the record.
6. Click the **OK** button.

Accessing Files using other Applications

About Xythos Drive

As a Xythos user, you can also access your files using the Xythos Drive, a desktop application that maps your online account to a local drive on your computer. Xythos Drive is integrated with Windows Explorer, providing a familiar environment to drag-and-drop, open, edit, and save files using other desktop applications.

You must download and install the Xythos Drive onto your computer. Once installation is complete, the Xythos Drive will have a set of services that allow you to access your Xythos folders through Windows Explorer, MS Office, and any other WebDAV client.

For more information about WebDAV clients, refer to [Accessing Your Account through Other Client Applications](#).

For more information on how to use the Xythos Drive with your Xythos account, click the **Help** button available from the **About** tab in the Xythos Drive.

Other Client Applications

Accessing Your Account through Other Client Applications

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.

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, see [Web Folders](#).
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, see [Web Folders](#).
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, see [Web Folders](#).
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, see [Web Folders](#).
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.

Web Folders

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 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 "https://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**".

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 "https://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 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 WebDAV 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 "http://www.sitename.com/<folder_name>", replacing <folder_name> with the folder path of the folder for which you are creating this Web Folder.
3. Click on "**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.

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.

Using your Xythos Account on a Mac

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. Because Mac OS X has its own implementation of WebDAV folders, you can access your Xythos account through a Mac WebDAV folder.

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.

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

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