Xerox

DocuShare®

DocuShare Quick Search Supplement

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Overview

DocuShare Quick Search enables you to easily and rapidly find and view the documents stored in DocuShare folders, called collections. Using a web browser and a straight-forward search interface, you can find the documents you need when you need them. DocuShare Quick Search provides a custom home page that allows you to find documents as well as navigate your folder structure. In addition, a side-by-side viewer lets you browse document content while viewing and editing the document's associated properties.

This supplement describes the features unique to DocuShare Quick Search: the home page and its search capabilities; the document and properties viewer; and the Quick Search page in the Administration UI. All other features and capabilities are described in the *DocuShare User Guide* and the *DocuShare Administrator Guide* located on the site **Help Desk**.
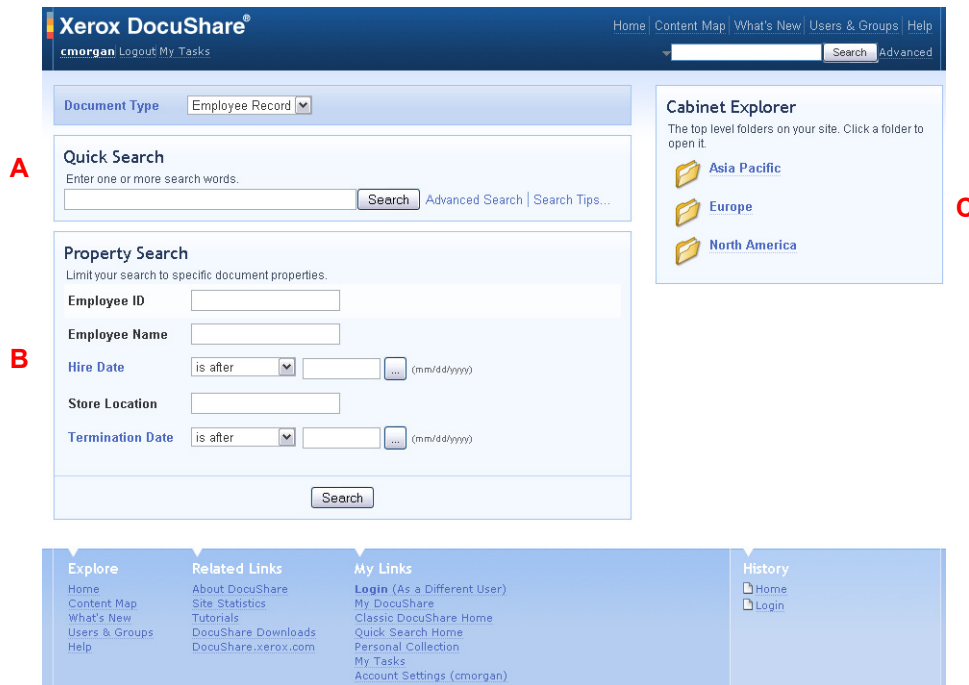
The Quick Search Web UI   2

DocuShare Quick Search provides a search-oriented home page and a side-by-side viewer that lets you view document content while viewing and editing the document's properties. This chapter explains how to use those features.

The DocuShare Quick Search home page

Your administrator customizes the Quick Search home page to display specific documents, properties, and top-level folders. However, the home page looks similar to the example shown below, with a search area on the left and your folder structure on the right.

The Quick Search home page includes these features:

A—Quick search area for finding documents that include one or more search words

B—Property search area for finding documents based on assigned property values

C—Your site's top-level file folders (also referred to as collections), which you can click to open

Your administrator determines the home page used on your site: the standard DocuShare home page, the Quick Search home page, or the My DocuShare page. The home page displays after you log in and when you click the **Home** link on the navigation bar. In addition, you can choose to set a different home page. See *Changing your home page on page 2–4*.

From any DocuShare page, you can go to the standard DocuShare home page by clicking the **Classic DocuShare Home** link under **My Links** on the page footer. To go to the Quick Search home page, you click the **Quick Search Home** link under **My Links**.

Running a search from the home page

From the Quick Search home page, you can run a basic search to quickly find documents. Depending on how your site is set up, you may also be able to find documents based on their type and assigned property values.

To run a basic search:

1. Go to the Quick Search home page.

2. From the **Document Type** menu, select the type of document to find. More than one type of document appears if there are custom documents on your site.

3. Under **Quick Search**, enter one or more words in the field. Separate each word with a space.

   Searches are not case-sensitive. A search for *Atlantic Ocean* is identical to a search for *atlantic ocean*. Also, you can exclude common words such as from, it, and where.

4. Under **Property Search**, narrow your search by entering values in one or more of the displayed property fields.

5. Click **Search**.

   DocuShare displays the search results.

Refer to the *DocuShare User Guide* for additional search capabilities such as using the search area on the navigation bar and running advanced searches.

Using the side-by-side viewer

For PDF documents, a variety of image documents (GIF, JPEG, PNG, TIFF), and other document formats, you can view the document content while viewing and editing the document's properties. A small **Windows** icon appears next to the title of a document that you can open in the side-by-side viewer.

Note: To view Microsoft Office 2003 documents, you should use Internet Explorer. Also, make sure your Folder Options are configured to open each document type within the same browser window. To view Microsoft Office 2007 documents, you should use Internet Explorer and you should change the registry to allow the Office 2007 system files to open in Internet Explorer. See the Microsoft article *for more information.*

To view a document and its properties:

1. Locate the document that you want to view.

2. Click the document title.

   Both the document and its properties display in a separate window.

   *Note: To open or download the document, click the **Document** icon located to the left of the document title.*

3. On the Edit Properties page, change any of the properties and click **Update**.

   If you only see the View Properties page, then you do not have the necessary permission to edit the properties.

4. Click **Close** to close the window.

Changing your home page

If you prefer to use a home page different from the one your administrator specified for your site, you can set your own home page.

To change your home page:

1. On the navigation bar, click your username.

2. On the View Properties page, click the **Edit** link.

3. In the **Home Page** field, enter the URL to a collection or workspace (for example: http://mydocushare.com/dsweb/View/Collection-155); or click one of the preset URLs.

4. Click **Apply**.

Each time you log in and click the **Home** link on the navigation bar, the page you specified will appear. At any time you can display the DocuShare or the Quick Search home page using the links under **My Links** on the page footer.

Configuring Quick Search   3

DocuShare Quick Search provides a configuration page in the Administration UI. If you are an administrator, you use this page to select the properties that display for each type of document on the Web UI pages and to set up the top level collections that display on the Quick Search home page.

Changing the property display for documents

Using the Quick Search page, you can change the properties that display on the search home page and the side-by-side viewer for each type of document on your site. In addition, when new custom document types are added to your site, you can add the document types and then select the properties to display on the Web UI pages. When you no longer want a document type to appear on the search home page or to use the specified properties in the side-by-side viewer, you can remove the document type.

To change the document types and properties that display on Web UI pages:

1. On the DocuShare navigation bar, click **Admin Home**.

2. From the **Administration** menu, click **Site Management | Quick Search**.

3. Click the tab for the Web UI page whose displayed properties you want to change.

4. From the **Document Type** menu, select the document type whose displayed properties you want to change.

   A list of properties for that Web UI page and document type displays, with **Yes** and **No** radio buttons next to each property.

5. For each property, click **Yes** if you want the property to appear on the selected page for the document type or click **No** if you do not want the property to appear on the selected page for the document type. Properties are displayed on the page in the order in which you select them.

   Note: *When setting the properties to display on the search home page, the same properties display as column headings on the search results page. Therefore, you may want to limit the number of properties as the page width increases to accommodate the properties.*

6. To make more changes, repeat steps 3 through 5.

7. To add a new document type, do the following:

   a. Click the **Document Types** tab.

   b. From the **Add Document Type** menu, select the document type.

Note: If the **Add Document Type** *menu does not appear, then there are not any custom document types that you can add.*

c.   Click the **Add** button.

The document type appears in the **Document Type** menu on the three other tabbed pages and on the search home page. Repeat steps 3 through 5 to select the properties to display for that document type on the Web UI pages.

8. To remove a document type, do the following:

a.   Click the **Document Types** tab.

b.   From the **Remove Document Type** menu, select the document.

Note: If the **Remove Document Type** *menu does not appear, then all document types have been removed.*

c.   Click the **Remove** button.

The document type no longer appears in the **Document Type** menu on the three other tabbed pages and on the search home page.

Setting up the Cabinet Explorer folders

Using the Web UI and the Quick Search configuration page, you can define which top level folders (collections) to display on the Quick Search home page and create a collection hierarchy under those folders.

Before you begin, you should plan the collection hierarchy that you want to use at your site as well as the access permissions you want to give to site users and groups.

To set up the Cabinet Explorer top level folders:

1. In the Web UI, create a collection. Note the handle number.

2. In this collection, add the collections that you want to display under Cabinet Explorer on the Quick Search home page. These are the top level folders.

3. In the top level folders, create additional collections.

4. Continue creating collections until your hierarchy is complete.

5. On the DocuShare navigation bar, click **Admin Home**.

6. From the **Administration** menu, click **Site Management | Quick Search**.

7. Click the **Search Home Page** tab.

8. In the **Collection Handle** field, enter the collection handle you noted in step 1.

9. Click **Apply**.

10. On the DocuShare navigation bar, click **Home**.

    The collections you created in step 2 display under Cabinet Explorer.

Setting the home page

Depending on your site preferences, you can set the default home page. The home page displays after users log in and when they click the **Home** link on the navigation bar.

To set the home page:

1. On the DocuShare navigation bar, click **Admin Home**.

2. From the **Administration** menu, click **Site Management | Site Configuration**.

3. From the **Set Home Page** menu, select the page that you want to display after users log in and when they click the **Home** link on the navigation bar.

   Users can choose to set a different home page. See Changing your home page on page 2–4.