ROYAL DRIVE 7.0 - QUICK START

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Creating and Accessing Your Account

First time users are required to self-register using MyScranton to create their Royal Drive account. Afterwards a staff or faculty member may download and install the Royal Drive client to their work computer to create an environment similar to a mapped drive in Windows. To access additional help, support, and the desktop client type the URL https://royaldrive.scranton.edu/support/.

How to:

1. First, log into the MyScranton web page and then click on the Royal Drive icon.
2. When the Royal Drive interface opens you are in your */user account*.

Note:

- ***Key words are italicized** and/or **formatted in bold**.*
- This documentation has been abbreviated to eliminate repetitive instructions. Therefore, instructions on how to access the proper screen will be preceded by the heading ***How to:***

New User Interface

Royal Drive has a new look that includes several timesaving and sharing enhancements. Using Web 2.0 technology any feature available ***on*** a file, folder, record, or record folder can now be accessed with a ***Right-click***.

Depending on access, your Royal Drive account may contain two screens, ***Document Manager*** and ***Records Manager***. The ***Records Manager screen*** pertains to those users who have University archival privileges. Although mentioned, this *Quick Start applies to the Documents Manager*.

Document Manager

The Document Manager shows the content of the current folder with information pertaining to each item. Each file or folder is listed on a separate row and displays the items: ***Name***, ***Share Status***, ***Lock Status***, ***Date of last modification***, and ***Size*** by default. *To customize your settings* click on the button ***View***.

Pertaining to access there are three tabs: ***Document Manager Buttons***, ***Document Manager Columns***, and ***Records Manager Columns***.

- *Document Manager Buttons* – the default setting displays the eight most commonly used buttons that may be modified by the user.
- *Document Manager Columns* – displays the default items: Name, Share Status, Lock Status, Date of last modification, etc, which may be modified to display alternative information.
- *Records Manager Columns* – applies only to users who have access to the Records Management space. This tab provides the option to modify ***Common Properties*** listed.

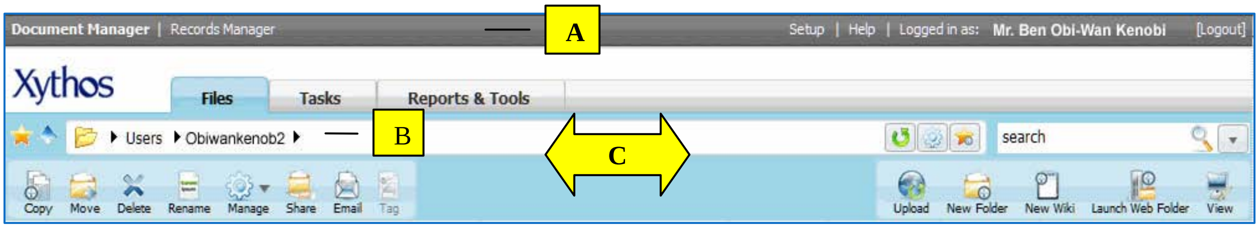
Note: Users may resize or rearrange columns by clicking on the column header and dragging the column into a new position. To resize a column mouse over the column's border, and then drag to the left or right.

Size Information

The bottom gray bar of the document manager includes the features:

- **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

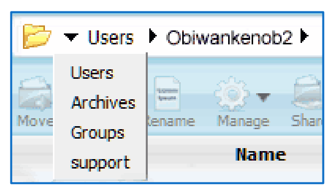
- **Available** – The difference between how much space remains available for saving files and folders within the current folder
- **None** –The current folder does not have a Quota set and is instead inheriting the parent folder's Quota setting.



A. ***Toolbar*** – Within the toolbar are links to:

- ***Document Manager*** – Click on the Document Manager link to return to your home folder.
- ***Records Manager*** – Click on the Records Manager link to return to your record series listing (provided you have Records Manager privileges).
- ***Setup*** – Click on the Setup link to access your account's management functions, such as:
  - My Settings
  - My Contacts – Reserved for adding your contacts or groups for file or folder sharing.
  - Roles – Pertains to Records Manager users
  - Workflow Templates
  - Classification – Pertains to Records Manager users
  - Records Management – Pertains to Records Manager users
  - Help – Clicking on the Help link will display the help topics.
  - Logout – Click the logout link to log out of your account.

B. ***Navigation Bar*** – The current directory path is always located above the directory contents listing. It can be used for navigating to parent directories or verifying the location of the current directory.



To the right of the directory path are additional action icons to:

- Refresh the current directory
- Manage & edit the details of the current folder
- Bookmark the current location
- Search for files in your account and accounts that you have permission to access.

C. ***Document Manager Buttons*** – Eight of the most commonly used buttons are displayed by default. To modify the current setting click the **View** button, then the tab **Document Manager Buttons**.

	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 Folder: Create a new folder.		**Tag:** Create keywords.
	New Wiki: Create a new Wiki.		**Trash:** Empty the Trash.
	****Open:** View the file.		**Up:** Navigate one folder above the current folder.
	****Overwrite:** Overwrite the existing file.		**Upload:** Using either basic or advanced upload, add files and folders.
			View: Modify the current selection of buttons and columns.

D. ***The Right Click Menu*** **–** Each file and folder has a Right-click menu featuring the following actions.

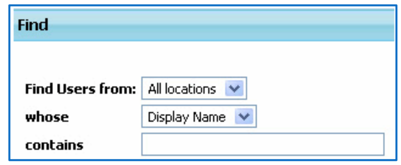
<u>**File**</u>	<u>**Folder**</u>
Save to Desktop Open in Browser **Manage**: Summary, Tickets, Permissions, Logging, Versioning, Classification, Tags, Running Workflows, Workflow History, Subscriptions, Lock Details, Comments, Content Type. Share Email Copy Link Location Copy Move Delete Rename Save to Zip File Bookmark Subscribe Create RSS Feed Tag Start Workflow Make Record	Open **Manage**: Summary, Tickets, Permissions, Default Logging, Default Versioning, Classification, Running Workflows, Workflow History, Workflow Template, Subscriptions, Lock Details, Comments, Storage Quota. Share Email Copy Link Location Copy Move Delete Rename Save to Zip File Bookmark Subscribe Create RSS Feed Start Workflow

Contacts & Groups

You can share files or folders within the community directly from the file or folder's ***Sharing page***.

How to: On the **Toolbar**, click the link **Setup**, the tab **My Contacts,** and then the **New Contact** button.

Add a new Contact



1. Enter the user's exact user name in the box provided.
   -Or - Use the Find option to locate the user within the organization (**by Display Name or ID**).
2. Enter the search criteria, and then click **Ok**.
3. Place a checkmark in the box associated with the user and then click **Ok**.

Add a new Group

1. Click the ***New Group*** button.
2. Provide a Name for the Group, and then click ***Ok***
3. Click the button "***Add Members***" and then **Finish** when completed.

Add or remove users to an existing Group

1. Select the name of the Group to modify.
2. Click the delete icon "**x**" associated to the user to remove, or click the ***Add New Members*** button to add users. Click ***Finish*** when completed.

Delete an existing Contact or Group

1. Click on the delete icon "**x**," which corresponds to the Contact or Group to delete.

Folder and File Management

Several **Sharing and Tracking** options within the Manage menu are used to administer, share, and track selected files and/or folders within the Royal Drive system.

Sharing and Tracking Properties

Folder Management		
Sharing	Default Logging	Lock Details
Tickets	Default Versioning	Comments
Permissions	Subscriptions	Storage Quota

File Management	
Sharing	Tags
Tickets	Subscriptions
Permissions	Lock Details
Logging	Comments
Versioning	Content Type

In addition to sharing your folders and files with other users, **Folder management** options manage and track the selected folder, sub-folder, and associated files. Whereas, **File management** options keep track of how, when, and what was done to a file over time.

Note: For more information about Folder and File management options, refer to the specific Help section for that property:

For example:

To View a File/Folder's Manage/Summary Page

1. Place a check mark in the box associated to the file or folder, and then click the button **Manage | Summary.**
2. **Or**, right-click on the selected file or folder and then click the options **Manage | Summary**.

The Summary section includes all "static" properties in the system however; you may access a file or folder management option under the left **Manage menu**.

To:

... Change a folder's Storage Quota
... Change or set Default Logging for a folder
... Change the Content Type of a file

Uploading Files

The two modes of upload are: (a) ***Basic***, which allows you to compile a list of files to upload by browsing for one file at a time, and (b) ***Advance,*** which allows you to drag-and-drop files or folders onto the ***Advanced Upload screen***.

How to: Locate the folder that contains the files to upload, and then click the **Upload** button.

Basic Upload

1. Click the link **Basic Upload**, then **Browse** and select the file.
2. To upload more files, click the buttons **Add Files** and **Browse**. Repeat as needed, click **Start Upload** after all files have been added

Advanced Upload

1. Click the link **Advanced Upload**.
2. **Either** drag and drop files and folders onto the drag-n-drop area. **Or,** click on **Add Files** and select the files from your local machine.
3. Click **Start Upload**.

Note:

... If the upload should stop or you receive an error click **Done** to exit.
... If you need to stop the upload, click **Stop Upload.** Files that were successfully uploaded before the stop will remain in your account.

Overwriting Files

Using the Upload feature you may be prompted to overwrite an existing file if a matching file name is found. An alternate method is to use the ***Overwrite button*** within the file's **Manage** screen.

<u>Overwrite a File</u>

... Within the File's Manage screen click the **Overwrite** button.
... Click the **Browse** button to locate the file to upload over the existing file.
... Click **Start Upload**. When the upload finishes you are returned to the Document Manager screen.

Note: *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.*

New Folder Wizard

The **New Folder Wizard** guides in **creating**, **sharing**, **emailing**, and **configuring** your new folder. You may skip through to the next step or end the wizard at any time.

Create a Folder

1. Click the **New Folder** button, then name the folder in the field provided. Click **Finish** to exit the **Wizard** or **Next** to continue to the **Share** screen.
2. Enter the user or group name in the box provided, **or** use the **Find Utility**. If you used the Find Utility, select the users and then click the ***Add Selected Users*** button.

3. Click ***Next*** to skip the **Share** portion of the wizard *(leave the fields blank)*, or click ***Finish*** to exit the Wizard.

Opting to Share

Select from the following options:

- **Viewers -** Viewers have read-only access to your file or folder and cannot modify the properties or content of files and folders
- **Contributors** - Contributors can modify files (edit/delete) and add content to folders.
- **Full Access** - Full Access users can modify files and add content to folders or share with another user.

Click the appropriate radio button after determining whether the selected access should apply to the current folder only, or include this folder and all sub-folders.

4. Click **Next** to create an email to notify users of the new folder and/or share.
   - OR - Click **Next** to skip the Email portion of the wizard and **Configure** your new folder
   - OR - Click **Finish** to exit the Wizard.

New Folder Configuration

When creating a new folder, you may define certain default settings during the creation. The available settings include:

- ***Default Versioning*** - If set to **on,** versioning is enabled for every new file uploaded to that folder. The system keeps a copy of every new file that is updated in that folder.
- ***Default Logging*** - If set to **on,** logging is enabled for every new file uploaded to that folder. Therefore the system maintains a record of whom and when your files were accessed.
- ***Storage Quota Size*** (in MB) - The permission to regulate how much information can be added to that folder.
- ***Subscriptions*** - Subscribing to a folder allows you to receive e-mail notifications and set the frequency of notifications when the following actions are performed:
  - 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

COPYING, MOVING, AND RENAMING FILES AND FOLDERS

Copying Files and Folders

How to: **Right-click** on the file or folder

1. Select the option **Copy**.

When copying a file or folder there are three options for determining the destination location.

- Use the default location and name supplied, which places the words "**Copy of**" preceding the original name and then adds the copy to the same level in the folder structure.
- Manually enter the location and name of the file or folder.
- Use the **Expand** icon to navigate and determine where to place the copy.

2. Click **Ok** to complete the copy or **Cancel** to abort.

Important: Sharing and permissions of the original files or folders do not carry over to the new copy.

Moving Files and Folders

1. Select the option Move.

When moving a file or folder you have two options for determining the destination location.

- Enter in the location and name of the file or folder.
- Click on the **Expand** icon to navigate to the new location.

2. Click **Ok** or **Cancel**.

Important: You cannot move or rename a file to itself, or a folder to a sub-folder of itself. Also, sharing and permissions of the original files or folders ***carry over to the moved files or folders***. The file or folder will also inherit permissions from the new parent folder as applicable.

Renaming Files and Folders

1. Choose the option ***Rename*** and then enter the new name in the field provided.
2. Click **Ok** or **Cancel**.

TRASH

Deleted files and folders are moved to your Trash, which was created during the first deletion.

How to: In the Document Manager screen double click your **Trash** icon.

Permanently delete all files or folders within your Trash

1. ***Click*** the button **Empty Trash,** and then ***Ok*** to delete or ***Cancel*** to abort.

Restore a deleted file or folder that exists in your Trash

1. ***Right-click***, then select the option Move or Copy. When restoring multiple files or folders, first select the associated checkmark.
2. Enter the destination folder for the restore or use the **Expand** button. Click ***Ok*** to restore.

Note: Files in your Trash require periodic deletion because they count against your storage space.

PERMISSIONS OVERVIEW

By default, every item created includes three sets of permissions:

- **Owner -** You are the owner of the items within your own account.
- **Authenticated Users -** Any users in our Organization that has a Royal Drive account and is logged in.
- **Public –** Use this option to make your files and folders public to the outside world.

When sharing access to your ***files*** or ***folders*** you control that access in four different ways:

- **Read Permission -** allows the user or a **Group** of users to only view the file or folders, sub-folders, and files that they were granted access.
- **Write Permission -** allows the user or a **Group** of users to only write to the folders, sub-folders, and files that they were granted. Write access includes the following: viewing, editing, renaming both the contents and options of the file or folder.
- **Delete Permission -** allows the user or a **Group** of users to move the file or folder to the trash. If a user is granted **Delete** access on a folder, they only have access to delete the folders, sub-folders, and files that they were granted access.
- **Administer Permission -** allows the user or a **Group** of users full access to a file or folder's **Manage/Summary** screen and the permission to make modifications to all "Manage" items.

SHARING YOUR FILES AND FOLDERS

Within the Document Manager, a quick glance of the column labeled "**Shared To**" quickly identifies if a file or folder is shared by:

- "**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 either shared with the **Public** or all users with an account.

When sharing a file or folder use either the **Sharing** screen to grant quick access as a contributor or viewer. **Or**, use the **Permissions** screen to provide detailed access such as Read, Write, Delete, and Administer privileges. You may use either option separately or in conjunction to provide a customized level of access.

Very Important: When sharing a folder you must select how the permission settings will be applied to sub-folders and files within this folder.

There are ***two*** choices:

- **Apply the changed permissions to this folder as well as its sub-folders and files.**
  Any changed permissions are 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 are granted permissions based on this folder's Inheritable Permissions. **Establishing a set of Inheritable Permissions** in a new or existing folder defines the default permissions for all new folders and uploaded files to that folder

Adding Viewers or Contributors using the Sharing Wizard

1. Place a check mark in the file or folders associated box, and then click the **Share** button.
   - OR-
   Right-click the selected item and click **Share**.
2. Within the **Share** screen, use the **Find** feature to locate the *user(s)* or *Group(s)* to provide access.
3. Type in the partial or full *user* name or *Group* name, and then click **Find**. Use the **Expand** icon for additional options. The results are displayed in the box below.
4. Click on the *user* or *Group*, and then **Add Selected Users**. Add as many *users* and *Groups* as necessary, click ***Next*** when finished.
5. Set the access for each user or group by clicking the associated radio button for the following options: **Viewer**, **Contributor**, or **Full Access**. **If applicable** apply one of the two folder permissions settings.
6. Click ***Finish*** to skip the Email portion and exit the Wizard, or ***Next*** to notify the users/groups by email of the share.

Add Viewers or Contributors using Permissions

How to: **Right-click** the selected file or folder, and then the ***Manage* -> *Permissions*** option.
Basic Permissions:

1. Click on the tab **Basic Permissions**, then the radio button associated to the user. **If applicable** apply one of the two folder permissions settings.

To remove the user or group permissions from this file or folder select the associated checkbox and then click the button **Remove Access**.

2. Click on the Add User/Group button to launch the Sharing wizard.
3. Click the Apply or Exit button when all permissions are complete.

Advanced Permissions:

1. Click on the tab **Advanced Permissions**.
2. Click the radio button associated to the user or group to provide Read, Write, Delete, Administer, Inherit Read, Inherit Write, Inherit Delete, or Inherit Administer permissions. **If applicable** apply one of the two folder permissions settings.

To remove the user or group permissions from this file or folder select the associated checkbox and then click the button **Remove Access**.

3. Click the Add User/Group button to launch the Sharing wizard. Click the Apply or Exit button when all permissions are complete.

Overwrite Folder Permissions

In order to overwrite the existing permissions, you must click the **Overwrite Permissions** button. When the **Overwrite Permissions** button is used, previous settings are erased for the current folder, all of the folder's sub-folders and files.

Overwrite existing Permissions

1. Locate the Folder to change, then set the folder and inherit permissions.
2. Click the **Overwrite Permissions** button, then ***Ok*** to confirm the changes or ***Cancel*** to abort.

Locking Files and Folders

Locking files and folders prevents other users from editing or saving changes to a particular file until you release the lock or it expires (seven days from the date & time created).

How to: Right-click on the selected item, and then click on **Manage -> Lock Details**

Create a simple lock on a file

1. Select either **Locked** or **Unlocked** for Lock Status.
2. Click ***Apply*** to view the changes, or ***Exit*** to save and exit the screen.

Create a simple lock on a folder

1. Select either **Folder Locked**, **Unlocked** for Lock Status.
   Note: Do not select Folder and Contents Locked or you will create a Recursive lock.
2. Click Apply to view the changes, or Exit to save and exit the screen.

Create a recursive lock on a folder

Recursive locks apply to a folder and all of its contents, including both files and sub-folders. They can only be created on folders if all content within that folder is unlocked.

1. Select the **Folder and Contents Locked** for Lock Status.
2. Click ***Apply*** to view the changes, or ***Exit*** to exit the screen.

To View who has locked a file or folder (requires write permission)

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

Remove a lock on a file or folder (requires write permission)

1. Choose the option **Manage -> Lock Details**.
2. Select **Unlocked** from the **Lock Status** drop-down menu.
3. Click **Apply** button to view the changes, or **Exit** to save and exit the screen.

EMAIL SHARE

One of the easiest ways to share files and folders is using Royal Drive and e-mail to send links to files instead of sending the files themselves.

Share a file or folder through email

1. Locate the intended file or folder; place a check mark in the associated box, then click the **Email** button. **Or**, ***Right-click*** the selected file or folder, and then click the **Email** option.

The groups and user names are automatically listed within the **To** field.

2. To email additional users, click the **To** entry box, start typing a user's **Display name**, **user name**, or a **Group name**.
3. Separate users/groups by commas or semicolons. Alternatively, click the **To** button to **Find** and add *users* or *groups*. You may also edit the subject and body of the notification e-mail if you wish.

Note that there is a placeholder for the link(s) to the file(s) and/or folder(s) that is replaced with the appropriate link(s) once the email is sent.

4. Click **Send** to send the e-mail.

Emailing Tickets

Tickets allow users access to your files and folders without a Royal Drive account and without the need to change permissions. Access permissions are defined per ticket using several advanced options including password-protection and expiration dates.

Ticket Concepts

When creating a ticket, the following changes to your account will occur.

Sharing Permissions Entry	During the **Ticket** creation process, you are prompted to specify either *Read Only* or *Read, Write and Delete* access to the file(s) or folder(s). This information is stored in the file or folder's **Permissions** screen.
Password-Protection is Optional	When creating a ticket, you have the option of selecting password protection. If enabled, the password enabled ticket link is sent and there will not be a password-free link. The password is not supplied in the e-mail.
Ticket Expiration is Optional	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.

Email a Ticket to a file

1. **Right-click** on the file or folder, then select **Manage -> Tickets**.
2. Place a check mark in the associated box, then click the **Email** button to open your default e-mail client.
3. The full path and file name of the ticket is listed along with an Intellilink.
4. Click **Finish** in order to exit the screen.

Note: You may e-mail the link to any non-Royal Drive or Royal Drive user. If you have sent the password-protected link, you must separately provide your e-mail recipients the correct password.

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.

How to: Right-click on the file or folder, then click the **Mange | Comments** option.

Comment a file or folder

1. Enter text into the comments box, click **Save** to view the changes, or **Finish** to save the changes and exit the screen.

Delete a single comment on a file or folder

1. Click the delete icon "**X**," next to the comment to delete, and then **Finish** to exit.

Delete all comments on a file or folder

1. Click the button **Delete All Comments**, and then Finish to exit.

About Searches

Searches allow you to search for files within your Royal Drive account as well as files that you have access permission.

To perform a "Quick Search" on a file's name and content within the current folder.

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

To perform a Search:

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

The File or Folder Name	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."

2. Click **Search**

The search results display a list of the files matching your criteria. From here, 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 and then select the criteria for the search.
2. Click the **Search** button, and then click the **Save Search** button, supply a name for the search in the **Save Search** window. Click **Ok**.

Save search results

1. Select criteria for the search, and then click the **Search** button.
2. Click the **Save Search Results** button, and then click the **Save Search** button, supply a name for the search in the **Save Search Results** window, and determine the location in which to save it.
3. Use the **Expand** button to view your folders, and then click on the folder in which you would like the file saved.

Manage Searches

Within Royal Drive, you may create, modify, and access your saved searches at any time.

How to: Click the **Bookmarks and Saved Searches** icon to the left of the navigation bar.

Last Search

1. Click on the link **Last Search** to open your last search along with any results.
2. *Optionally you may use the **Save Search** or **Save Search Results** buttons.*

Saved Searches

1. Open the **Bookmarks and Saved Searches** menu to access all currently saved searches.
2. Click on a **saved search** of your choice and the search screen will open with the results of your saved search criteria.
3. *Optionally, you may now use the **Save Search** or **Save Search Results** buttons.*

Managing your Searches

1. Click on the **Manage Searches** link to open all currently saved searches.
2. Rename or Delete the saved search by placing a checkmark in the associated box and then click either the **delete** or **rename** button.
3. Click **Finish** to exit the screen.

Default Logging

The Logging option on a folder differs from the logging setting of a file. With files, the system maintains a record of whom and when your files were accessed. Whereas, logging on a folder sets the default logging for all files created within that 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**. The same holds true if the Logging option is **On**

Turn default logging on or off for a folder

1. **Right-click** on the folder that you wish to change default setting, and then select **Manage -> Default Logging**
   - OR- Click the **Manage** button, and then click the **Default Logging** link.
2. 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.

3. Click **Apply** to view the changes, or **Exit** to save the changes and 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. **Right-click** the file for which you wish to turn on logging, and then click the **Manage -> Logging** option.
   - Or - On the **Manage** screen, select the **Logging** link.

2. Click the **Enable Logging** button and then click the **Exit** button to exit the screen.

Note that a logging history can only be applied to files, not to folders.

Default Versioning

The Versioning setting on a folder 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. **Right-click** on the folder to enable versioning, then click the **Manage -> Default Versioning** option.
   - Or - On the **Manage** screen, select the **Default Versioning** link.

2. 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.

3. Click the **Apply** button to view applied changes, or click the **Finish** button to save the changes and exit the Default Versioning screen.

File Versioning

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 control exactly which versions are saved in a file's history.

How to: **Right-click** on file that requires versioning

Turn Versioning on or off for a file

1. Click the **Manage -> Versioning** option, and then select the link **Versioning**.
2. Use the **Enable/Disable Versioning button** to turn versioning on or off.
3. Click the **Exit** button to save the changes and exit the screen.

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

1. Click the **Manage -> Versioning** option and then select the link **Versioning**.
2. The Versioning window displays each "stage" of an evolving document: Version 1, Version 2, etc.
3. Clicking on the version number allows you to view (not edit) the file in that particular stage.

   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. Click on the option **Manage -> Versioning,** or on the **Manage** screen, select the link **Versioning**.
2. Place a check in the box associated to the file version you wish to copy.
3. Click the **Copy** button in the Versioning window and either specify or browse to a destination path.
4. To rename the file, simply change its name in the Destination text box and click on **Ok**.

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:

How to: **Right Click** on the selected file

Checkout a file (only applicable if versioning is On)

1. Click the **Manage -> Versioning** option, or on the **Manage** screen, select the link **Versioning**.
2. Click the **Checkout File** button. Automatically, a temporary version of this checked out file is created.
3. Click **Exit** 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)

How to: Click the **Manage -> Versioning** option, or on the **Manage** screen, select the link **Versioning**.

1. Click the **Checkin File** button to overwrite the temporary version that was created when the file was checked out.
2. Click **Exit** to exit the **Versioning** screen.

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

1. Click the button **"Uncheckout File"** to automatically delete the temporary version that was created during checked out.
2. Click **Exit** to exit the **Versioning** screen.

Note*:* Only the most recent version of the file will be deleted. If you would prefer to checkout an older version of the file, you will need to utilize the **Make a Copy** button.

TAGS

You have the option of creating searchable keywords (**Tags)** for all files that you have **Read** and **Write** permissions. However, if you would like to search for a Tag, you need only the Read permission to view them.

Note: Tags cannot be used for folders, but all files in a folder may be tagged. In addition, there 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.

How to: **Right-click** on the file and select **Tag** from the menu. Or, place a check mark in the associated box and click the **Tag** button.

Creating a Tag

1. Type in the associated **Tag** for this file, and then click the **Add** button.
2. Add as many **Tags** as you like using the **Add** button, and then click **Submit**.

Note*:* Words separated with a space are identified as separate tags, thus allowing you to enter several tags for the file at one time. 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. Type in the associated **Tag** for these files, and then click the **Add** button.
2. Add as many **Tags** as you like using the **Add** button and then click **Submit**.

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 created.

Deleting a Tag

1. Within the **Tag** screen, you will see all **Tags** associated to the file.
2. Click the **"X"** delete icon for the associated **Tag**.
3. Click the **Submit** button once you have finished modifying the **Tags.**

Deleting a Tag for a group of files

1. Within the **Tag** screen, you will see all **Tags** associated to the files.
2. Click the **"X"** delete icon for the associated **Tag**.
3. Click the **Submit** button once you have finished modifying the **Tags**.

Searching for a Tag

1. Click the **Expand** button to the right of the **Search** icon 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, and then type the name of the **Tag** you are looking for in the **Tags** field. Click the **Search** button.

Creating Bookmarks

Bookmarks are shortcuts to the most frequently accessed folders and files within your account and those accounts that you have been allowed access.

Bookmark a file or folder

1. Place a check mark in the box associated to the file or folder, and then click the **Create a Bookmark** button.
   - Or - Right-click the selected file or folder, and then click the **Bookmark** option.
   - Or - Click the **Bookmark** button, then the link **"Manage Bookmarks."** Click the **Create a Bookmark** button.

2. Provide a name for the Bookmark and the Full Path of the file or folder

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

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

Using and Managing Bookmarks

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.

How to: Click the **Bookmarks and Searches** icon, and then the link **Manage Bookmarks**.

Edit a bookmark

Click the **Bookmarks and Searches** icon, and then click the **Manage Bookmarks** link.

1. Place a checkmark in the box associated with the Bookmark to modify, and then click the **Edit** button.
2. Modify the **Bookmark Name** and/or the **Full Path**
3. Click **Submit**.

Delete a bookmark

1. Place a checkmark in the box associated to the Bookmark, and then click the Delete button.

Creating Subscriptions

Subscriptions are available to users with **read** access. A notification (**report**) is sent via e-mail when files or folders are viewed, changed, or commented. The type of report and frequency of the report is determined when the subscription is created.

Create a new Subscription

1. **Right-click** the selected file or folder, then click on the **Subscribe** option.
   - Or - On the **Manage** screen, select the **Subscriptions** link, and then click the **Create a Subscription** button.
   - Or - Place a checkmark in the box associated to the file or folder, and then click the **Subscribe** button.
2. Place checkmarks in the boxes associated to the type of subscription.
3. 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.
4. 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 Royal Drive.

"Notify me of" Options

Event	Option
Change Events	"Change Events on files" include: • 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 "Change Events on folders" include: • 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	"Read Events" include: • When a file is viewed or opened. • When a file within the folder is viewed or opened.
Comment Events	A comment event occurs whenever a comment is created on a file or folder.

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 that are pertinent to the file or folder you are currently managing.

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

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 tab **Reports & Tools,** and then the **Subscriptions**.
2. Click the associated **"X"** icon to the subscription you would like to cancel.

<u>View existing Subscriptions for the file or folder</u>

1. **Right-click** on the file or folder of your choice, select **Manage -> Subscriptions**.
2. All subscriptions for this file or folder will be listed.

<u>Cancel existing Subscriptions for the file or folder</u>

1. **Right-click** on the file or folder and then choose **Manage -> Subscriptions**.
2. Place a checkmark in the associated box; click the **Unsubscribe** button to remove the Subscription.

<u>Automatic cancellation of a Subscription or notification</u>

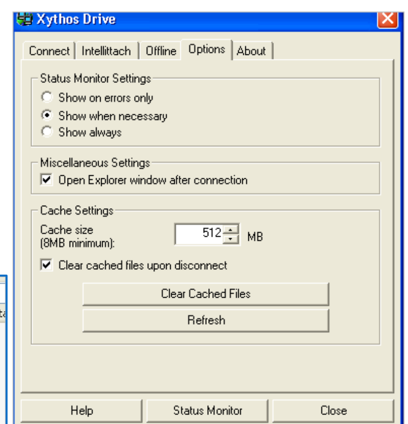
Subscriptions and their notifications are also automatically canceled due to certain changes within the system. If the subscribed file or folder is deleted, the subscription is automatically canceled.

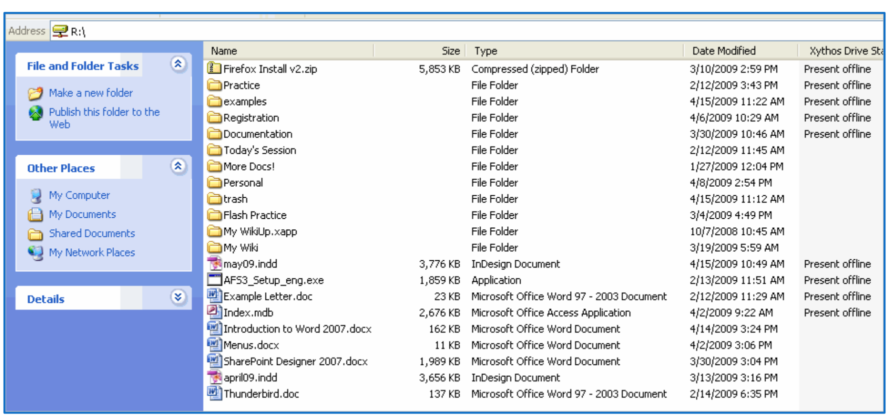
If the permissions of a file or folder are changed such that the current subscriber no longer has the correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

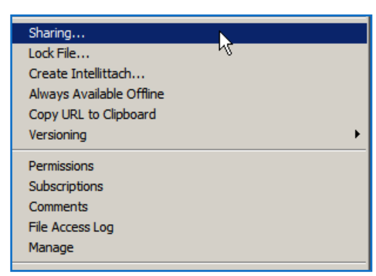
Windows Desktop Client

The Windows Desktop client provides an alternative method to connecting to Royal Drive. Installing and logging in using the desktop client on your computer creates an environment similar to a mapped drive in Windows, specifically a Window Explorer type environment.

The default setting on the Desktop client (Xythos Drive) automatically opens the connection in an Explorer window.







Important: Please note that all features available in the Web client are available from the PC client. *To access these features* right-click on any file or folder and chooser from the menu provided.

More about the Client

When the client installs the default server URL is http://royaldrive.scranton.edu/support . When connected an Explorer Window opens displaying three folders. The three folders *Support*, *Groups*, and *Users* provide access to Royal Drive Support and your Department and Users folders. The user may elect not to have this window open automatically or even edit the address to open only a specific folder.

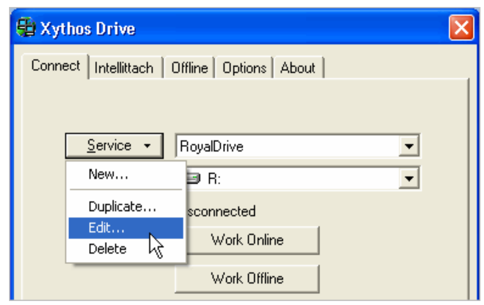
Personalizing Client Services

The client provides four user options:

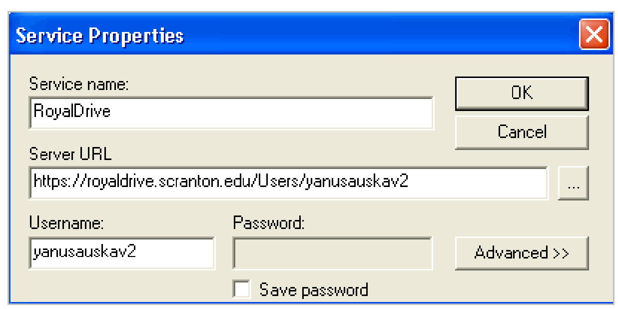
- New – create a new service to open the user's department or user folder.
- Duplicate – duplicate an existing service by providing a new service name and adding the name of a subfolder.
- Edit – edit an existing service's name or server URL
- Delete – remove an existing service (access to a folder that no longer exists).

How to Edit an Existing Service:

In this example, you will edit the existing service to open *Your User folder*. If connected to Royal Drive open the client and then click Disconnect.



1. Start the client by double clicking on the Xythos Drive icon.
   Or
   Click on the *Start menu* and then *All Programs* | *Xythos* | *Drive* | *Xythos Drive*.
2. When the client opens click on the down arrow on the *Service* button and choose *Edit*.
3. In the Service Properties box I left the existing Service name "Royal Drive", but added **/Users/the user name** to the *Server URL* to open my user folder in the explorer window.
4. Type your user name in the box provided and then click *OK* to save the changes.



How to Duplicate an Existing Service:

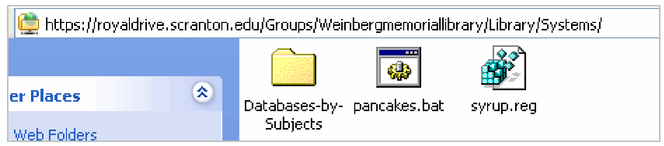
In this example, you will duplicate the existing service, rename the Service Name, and edit the Server URL. If connected to Royal Drive open the client and then click Disconnect.

1. Start the client by double clicking on the Xythos Drive icon Or
   Click on the *Start menu* and then *All Programs* | *Xythos* | *Drive* | *Xythos Drive*.
2. Click on the down arrow and choose the option *Duplicate*.
3. In the Service Properties box, the Service name was renamed "*Department Groups*", and /Groups ***replaced*** /Users/the user name in the *Server URL*.

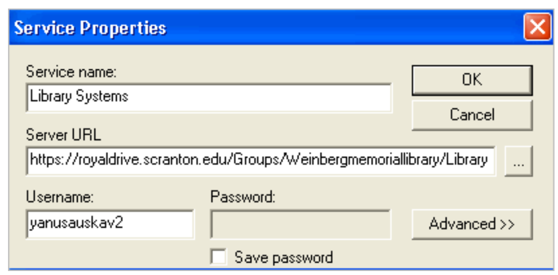
4. Type your user name in the box provided and then click *OK* to save the changes.

How to Create a New Service:
In this example, you will create a *new service*, type a new Service Name, and paste the Server URL from a secure IE Web folder. If connected to Royal Drive open the client and then click Disconnect.

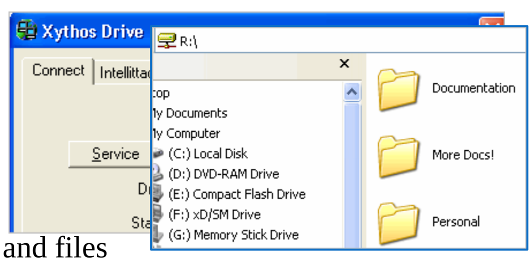
1. Open the MyScranton page in Internet Explorer and log in.
2. Click on the Royal Drive icon and then navigate to your Department folder in Groups.
3. Click on the Launch Web folder icon to open a secure Internet Explorer Window.
4. When the window opens copy the address in the window. You will paste it later in the Service URL.



5. Start the client by double clicking on the Xythos Drive icon
   Or
   Click on the *Start menu* and then *All Programs* | *Xythos* | *Drive* | *Xythos Drive*.
6. Click on the down arrow and choose the option "*New*".
7. In the Service Properties box, personalize the Service name, for example I used "*Library Systems*".
8. Paste the address you copied from the Web folder in the *Server URL*.
9. Type your user name in the box provided and then click *OK* to save the changes.

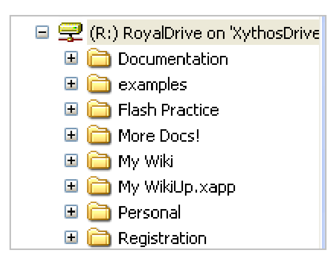


Very Important – To log into a specific service click on the drop down arrow to choose the service.



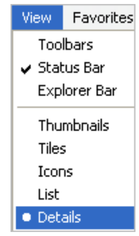
Offline access

To access files offline requires identifying which folders and files require synchronization.

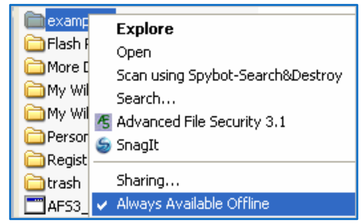


How to:
1. Access your Royal Drive account using the desktop client.
2. If the Explorer window did not open, open the window and click on *(R:)RoyalDrive*. This will open the drive's contents in the right pane.

3. Click on the menu *View* and choose *Details* from the side menus.



4. Right-click on any folder or file and choose *Always Available Offline*.

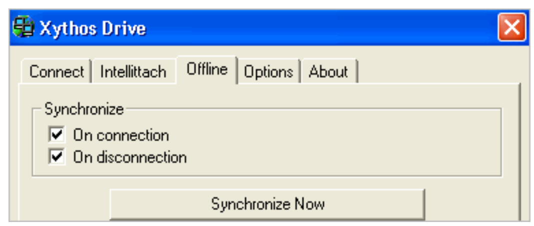


5. In the content pane, right click on any column heading (Name, Size, Type, etc.) and choose *More…*

6. Add the detail *Xythos Drive Status*, to show the offline availability of any selected folder or file.

<u>Synchronization options</u>
Open the Desktop Client (Xythos Drive) and click on the tab Offline. Place a checkmark to synchronize the selected files on either or both connection and disconnection.

Connection options



- On connection – when connected online Xythos Drive synchronizes the local copies of offline files with corresponding files on the server.
- On disconnection – upon disconnection Xythos Drive synchronizes the local copies of offline files with corresponding files on the server.
- Synchronize Now - click this button to immediately synchronize the local copies files selected as *Always Available Offline* with the corresponding files on the server.