

# ROYALDRIVE 7.2 - QUICK START

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## ACCESSING YOUR ACCOUNT

First time users will access their account using the web client in the MyScranton portal. Afterwards they may download and install the Royal Drive desktop 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 visit: <https://royaldrive.scranton.edu/support/>.

*How to:*

1. Log into the MyScranton portal or type the web address <http://royaldrive.scranton.edu> and then click on the *Royal Drive icon*.
2. When the Royal Drive web client opens you are in your */User account*.



## WHAT'S NEW

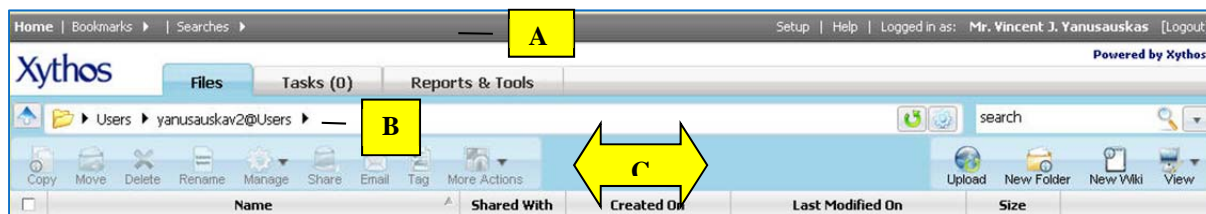
Royal Drive 7.2 includes several new features that increase user functionality. Changes to the main menu and the addition of a secondary menu make navigation easier within the application. Additional features include a List and Thumbnail View, Folder Tagging, More Action buttons, Comment controls, custom folder settings, and more.

*Note:*

- ... **Key words are italicized and/or formatted in bold.**
- ... The headings **\*NEW** or **\*UPGRADE** will precede any changes made in RoyalDrive.
- ... 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:***

## DOCUMENT MANAGER

The Document Manager consists of a *Navigation Toolbar*, *Toolbar Buttons*, and the *Document Manager Grid and Footer*. The *Document Manager Grid* 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 default items: *Name*, *Share Status*, *Created on*, *Date of last modification*, and *Size*.



### **\*UPGRADE**

**A. Main Menu** – Links to account options within Royal Drive.




- ... **Home** – Click on the Home link to return to your home folder.
- ... **Bookmarks** – Click on the Bookmark link to access, create, or manage your bookmarks.
- ... **Searches** – Click on the Search link to access your saved searches, last search, or managing existing saved searches.
- ... **Setup** – Click on the Setup link to access your account's management functions, such as:
  - ... My Settings – Preferences to change time zone, date/time style, email preference (**Xythos-web based or default email client**), and toolbar buttons.
  - ... My Contacts – Reserved for adding contacts and creating groups for file or folder sharing.
  - ... Workflow Templates – Predefined templates for the Approval Process workflow.

- ... **Help** – Clicking on the Help link will display the help topics.
- ... **Logout** – Click the link to end your account.

















**B. Navigation Toolbar** – 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
-  Perform a quick search of your files and folders.

**C. Document Manager Buttons** – The most commonly used buttons are displayed by default. To modify the current setting click on the links **Setup** and then **Tool Buttons**.

	<b>Copy:</b> Create a copy of the file or folder.		<b>Move:</b> Modify the location of the file or folder.
	<b>Delete:</b> Move the file or folder to Trash.		<b>Rename:</b> Modify the name of the file or folder.
	<b>Right click menu:</b> Expand allows for additional options.		<b>Share:</b> Share with other users.
	<b>Email:</b> Send an email notification once a resource has been shared.		<b>Tag:</b> Create and add keywords to files & folders to aid searching.
	<b>New Bookmark:</b> Add a new Bookmark for quick reference.		<b>Subscribe:</b> Notification of changes via e-mail.
	<b>RSS:</b> Create and Receive an RSS feed.		<b>More Actions:</b> Open, Lock, Subscribe, Save to Zip file, and Bookmark
	<b>Upload:</b> Using either basic or advanced upload, add files and folders.		<b>New Folder:</b> Create a new folder.
	<b>New Wiki:</b> Create a new Wiki.		<b>View:</b> Modify and save the current view of any folder.

**D. 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 – Provided the Desktop Client is installed Save to Desktop Open in Browser – Read only Quick View – Expands on thumbnail view with a larger view of the file and includes the metadata from list view. <b>Manage:</b> Summary, Permissions, Tickets, Logging,	Open <b>Manage:</b> Summary, Permissions, Tickets, Default Logging, Default Versioning, Tickets, Active Workflows, Workflow History, Workflow Template, Subscriptions, Lock Details, Comments, Storage Quota. Share Email Copy Full URL

Versioning, Tags, Active Workflows, Workflow History, Subscriptions, Lock Details, Comments, Content Type.	Copy
Share	Move
Email	Delete
Copy Full URL	Rename
Copy	<b>Lock:</b> This folder only, This folder and its contents
Move	Save to Zip File
Delete	Bookmark
Rename	Subscribe
Lock	Create RSS Feed
Save to Zip File	Tag
Bookmark	Start Workflow
Subscribe	
Create RSS Feed	
Tag	
Start Workflow	

### **\*NEW**

#### Custom Views – Personalizing your settings

**How to:** - Click on **View** and then the desired option.

- ▶ *List View* – the list view is the standard (default) view showing all content in a vertical list.
- ▶ *Thumbnail View* – the thumbnail view displays a small image or icon representative of the resource type.
- ▶ *Customized View* – customizing the current view by adding or removing column headings.
- ▶ *Use current folder settings as my default* – choosing this option saves the current layout as your default setting.
- ▶ *Save layout changes for this folder* – choosing this option applies the current changes to only this folder.

**Note:** To resize a column mouse over the column's border, and then drag to the left or right.

### **\*UPGRADE**

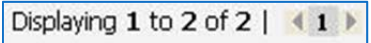
#### DOCUMENT MANAGER FOOTER

The footer (bottom gray bar) in the Document Manager Grid features the number of items in the displayed folder listing and the current folder's quota and size.

- ▶ **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.

- ▶ **Displaying** – The total number of files and folders currently displayed, along with navigation arrows.

This new feature includes a page display with forward and previous arrows to navigate through multiple listings that eliminates scrolling within the Document Manager Grid when an account included **300 or more file/folders**.



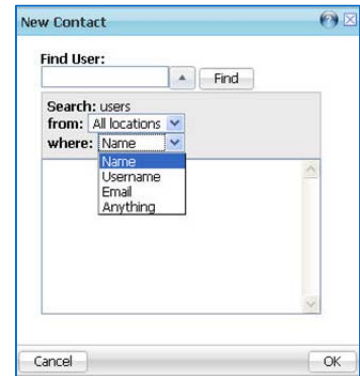
## CONTACTS & GROUPS

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

**How to:** On the Main menu, click **Setup**, then the tab **My Contacts**.

### Add a new Contact

1. Click the **New Contact** button on the **Users** tab.
2. Enter the user's exact Surname (*Mr. John H. Smith*) in the box provided.  
**-Or -** Use the Find option to locate the user within the organization (**by Name, Username, Email, or Anything**).
3. Enter the search criteria, and then click **Ok**.
4. Place a checkmark in the box associated with the user and then click **Ok**.



### Add a new Group

1. Click the **New Group** button on the **Groups** tab.
2. Name the Group, and then click **Next**.
3. Click the **"Add Members"** button. Click **Exit** when finished.

### 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 another user. Click **Exit** when finished.

### 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			File Management	
Sharing	Default Versioning	Lock Details	Sharing	Tags
Tickets	Tags	Comments	Tickets	Subscriptions
Permissions	Subscriptions	Storage Quota	Permissions	Lock Details
Default Logging			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.

For example:

#### To View a File/Folder's Manage Screen

1. Place a check mark in the box associated to the file or folder, and then click the toolbar button **Manage**.  
**Or**

2. Right-click on the selected file or folder and then click the option **Manage**.

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

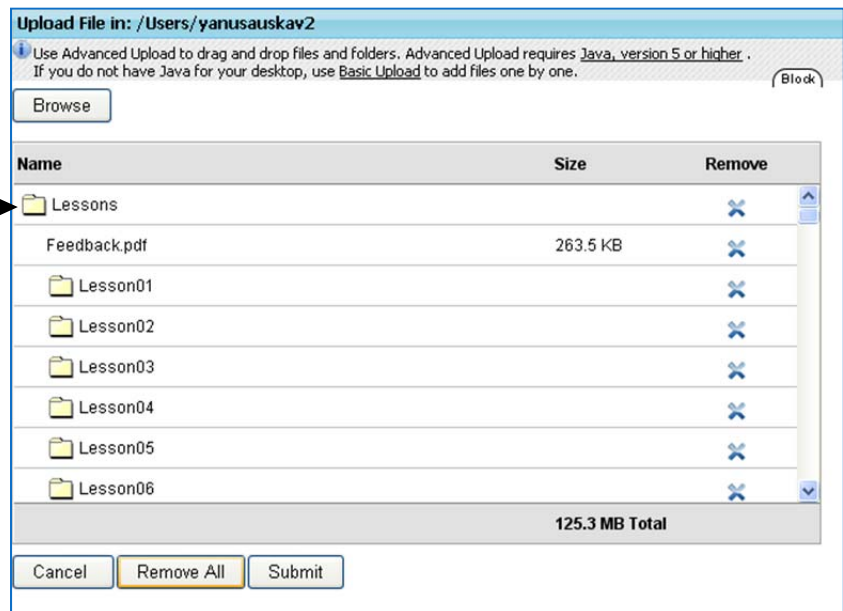
1. Click the link **Basic Upload**, then **Browse** and select the file.
2. To upload more files, click the buttons **Add Files** and **Browse**. Repeat as needed, click **Start Upload** after all files have been added.

### Advanced Upload

1. Click the link **Advanced Upload**.
2. **You may** drag and drop files and folders onto the drag-n-drop area, **or** click the **Browse** button to select an entire folder or a specific file from your local machine.

**In the screen below an entire folder was added using the Browse method.**

**Note** that the named folder "Lessons" contained subfolders and a PDF file.



3. Click the **Submit** button when ready.
4. Click **Start Upload** when ready.

**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.

### Overwrite a File

- ... 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.

### **\*UPGRADE**

**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 a **subfolder (overwritten files)** of your trash.*

## NEW FOLDER WIZARD

The **New Folder Wizard** provides 5 easy steps to **create** and **name a folder**, **choose users**, **verify permissions**, **configure folder settings** and **email** user(s) of their access. You may skip to the next step or end the wizard at any time.

### **How to:**

1. Click the **New Folder** button, then name the folder in the field provided.
2. Click **Next to Choose Users** or **Finish** to exit the Wizard.

### Opting to Share – Choose Users

3. In the box provided, enter the user(s) or group name.
4. Click **Next to Verify Permissions** or **Finish** to exit the Wizard.

### Verify Permissions - Select from the following options:

- ... **Viewer** - Viewers have read-only access to your file or folder and cannot modify the properties or content of files and folders
- ... **Contributor** - 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 your folder/file 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.

5. Click **Next to Configure** or **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. (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 for e-mail notifications and to control 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
- 6. Click **Next** to Send an Email notifying users of the new *folder/ share* or **Finish** to exit without notification.

## 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 content and then the option **Move**.
2. Click the **Expand** icon to open the **File and Folder Selector**, and then navigate to the destination.
3. Click **Ok** or **Cancel**.

**Important:** You cannot move or rename a file to itself, or a folder to a sub-folder of itself. In addition, 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:**

#### **Permanently delete all files or folders within your Trash**

1. Double click the Trash icon located in your home folder.
2. To delete the entire contents of Trash, click the Empty Trash button. This will also delete the contents of your Overwritten Files folder.
3. Click **Ok** to delete or **Cancel** to abort.

#### **Restore a deleted file or folder that exists in your Trash**

1. Double click the Trash icon located in your home folder.

2. Right-Click on the file or folder you wish to restore and then select the option Restore.

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.
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.

## 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** - the user or a **Group** of users are only allowed to view the file or folders, sub-folders, and files that they were granted access.
- ... **Write Permission** - the user or a **Group** of users are only allowed to 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** - the user or a **Group** of users are only allowed 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 With**" quickly identifies if a file or folder is shared by:

- ... "**None**" This file or folder is not shared with 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 **Share** 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 are 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 button **Share**.  
**- OR -**  
**Right-click** the selected item and then 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 name*, 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**.
2. Click the **Add User/Group** button to launch the Sharing wizard and apply the required permissions.
3. Click the **Finish** button when all permissions are complete.

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

##### **Advanced Permissions:**

1. Click on the tab **Advanced Permissions**.
2. Click the **Add User/Group** button to launch the Sharing wizard and apply the required permissions.
3. 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.
4. Click the **Finish** button when all permissions are complete.

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

## 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.

## \*UPGRADE

### 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**

#### **Create a simple lock on a file or folder**

- Right-click on the file or folder and then click on **Manage -> Lock**

#### **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.

- Right-click on the folder, and then click on **Manage -> Lock -> This folder and its contents**

#### **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. Right-click on the selected item and then click on **Manage -> Unlock**.

## 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. Select the intended file or folder, and then click the button **Share**. **Or**, *right-click* on the selected item and then **Share**.
2. In box provided, type the *group* or *user name*. To share with users who are not members of the campus, type and separate email addresses by comma or semicolon.
3. Click **Next** to establish permissions or **Finish** to create the ticket without sending it. After establishing permissions click **Next** to send an email notification about the share.

**Note:** Non-campus users are not able to **edit** or **delete** a file in Royal Drive. They must first save the file to their computer, make the necessary changes, and then return the file using email.

## 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.

<b>Sharing Permissions Entry</b>	During the <b>Ticket</b> 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 <b>Permissions</b> screen.
<b>Password-Protection is Optional</b>	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.
<b>Ticket Expiration is Optional</b>	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 linked to a file

1. **Right-click** on the file or folder, then select **Manage -> Tickets**.
2. If a ticket was created place a check mark in the associated box, then click the **Email** button to send an email using your set preference (Xyθος default client, Thunderbird).
3. The full path and file name of the ticket is listed along with an *Intellilink*.
4. If a ticket was not created, click the **New Ticket** button; check the appropriate boxes, and then go to **step 2**.
5. In the box provided, enter the group or user names; type any additional information within the space given.
6. Click **Send**.

**Note:** If you send a password-protected link, you must provide the recipients the password in another email or verbally.

## \*UPGRADE

### COMMENTING - 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. A new drop-down menu allows the user to mark comments as either "**Private**" or "**Public**."

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

#### Comment a file or folder

- If necessary change the *Comments are:* box to **Public** or **Private**.
- Type your comment in the **Add Comment** box and then click the **Save Comment** button.

#### Delete a single comment on a file or folder

- Click the delete icon "X," next to the comment to delete, and then **Exit** to finish.

#### Delete all comments on a file or folder

- Click the button **Delete All Comments**, and then **Exit** to finish.


### 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.

<b>The File or Folder Name</b>	1. Using the drop-down menu, select either <b>Name</b> "Contains" or "Equals." 2. Enter the word in the <b>File or Folder Name</b> field that you wish to find.
<b>File Content Contains</b>	Enter in the word(s) in the <b>File Content Contains</b> field that you wish to find.
<b>Conditions</b>	"Where <b>all</b> these conditions are met" or "Where <b>any</b> of these conditions are met".
<b>Order By</b>	Using the drop-down menu, select either <b>Order By</b> "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 button **Search**, and then the button **Save Search**, 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 button **Save Search Results**, and then the button **Save Search**, 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 can create, modify, and access your saved searches at any time.

**How to:** Click the main link **Searches** and then **Manage Searches**.

#### 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. Click the main link **Searches** and then **Manage 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:**

#### Turn Versioning on or off for a file

1. **Right-click** on a file, then choose the options **Manage -> Versioning**.
2. Click 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. **Right-click** on a file, then choose the options **Manage -> 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. **Right-click** on a file, then choose the options **Manage -> 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, then 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. **Right-click** on a file, then choose the options **Manage -> 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**," which will automatically delete the temporary version 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.

## **\*UPGRADE**

### TAGS

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

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/folder (s) 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 or folders

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 **New Bookmark** button.
  - **OR** - **Right-click** the selected file or folder, and then the option **Bookmark**.
  - **OR** - Click the main link **Bookmark**, and then the option **Bookmark this file/folder**.
2. Click **Ok**.

## \*UPGRADE

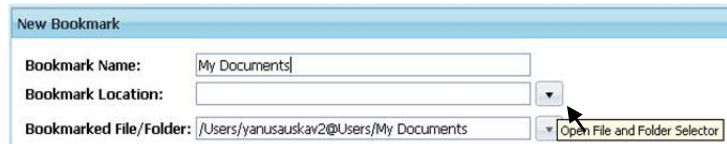
### MANAGING & ORGANIZING BOOKMARKS

Another new feature is the ability to organize bookmarks within the *Bookmark Manager* by creating **New Bookmark folders**.

**How to:** Click the main link **Bookmarks** and then **Manage Bookmarks**.

1. Click the button **New Bookmark Folder**, **Name the folder**, and then click **Ok**.
2. Place a check mark in the desired bookmark to move and then click the button **Move**.
3. Click **Exit** when **Finished**.


When creating a new bookmark and the folder already exists use the **Expand** button to browse to the Full Path of the file or folder.




**Note:** 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 main link **Bookmarks** and then **Manage Bookmarks**.

#### Edit a bookmark

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 **Ok**.

#### Delete a bookmark

- Checkmark the box associated with the Bookmark, and then click the button  **Delete**.

### 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. Set the expiration date, place the checkmark in the associated box to "Never expire" or set a date.
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 Administration.

"Folder" Options	
<b>Notify Me When:</b>	<ul style="list-style-type: none"> <li>• The files within this folder and/or its subfolder are edited</li> <li>• The files within this folder and/or its subfolder are viewed</li> <li>• Comments on the folder, its subfolders and or files are edited</li> </ul>
<b>Report Frequency:</b>	<ul style="list-style-type: none"> <li>• Daily</li> <li>• Immediately</li> </ul>
<b>Expires:</b>	<ul style="list-style-type: none"> <li>• Never expires</li> <li>• On a set date</li> </ul>

#### Cancel an existing Subscription within the Document 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.

#### View existing Subscriptions for the file or folder

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.

#### Cancel existing Subscriptions for the file or folder

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.

#### 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.

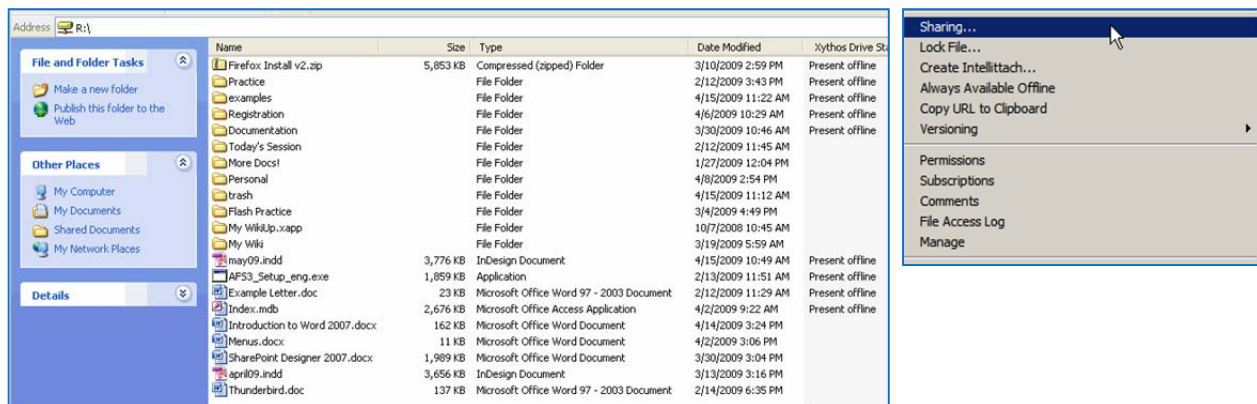
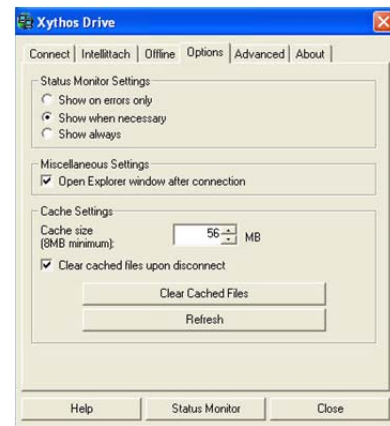
If the permissions of a file or folder are changed such that the current subscriber no longer has the

correct access to view or edit that file or folder, notifications will no longer be sent; however, the subscription will still exist.

## 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. **Note:** This client does not work on 64-bit Windows 7 or Vista computer.

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 choose 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

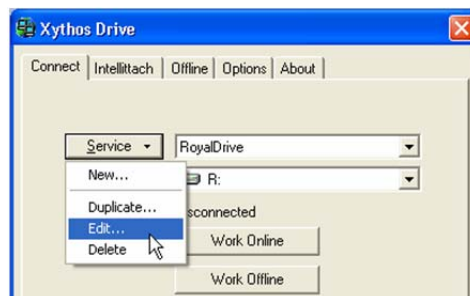
The client provides four user options:

- 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**

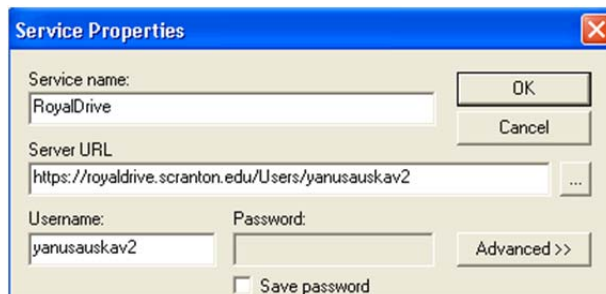
Click on  and then *All Programs | Xythos | Drive | Xythos Drive*.

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/username* 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*.

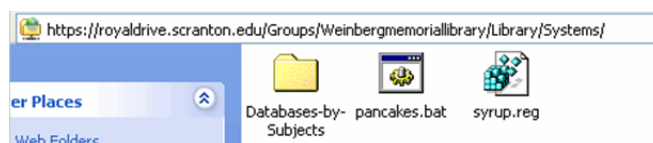
3. In the Service Properties box, the Service name was renamed “*Department Groups*”, and */Groups* **replaced** */Users/*the user name in the *Server URL*.

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.

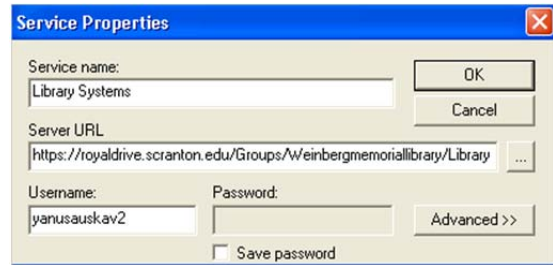


5. Start the client by double clicking on the Xythos Drive icon

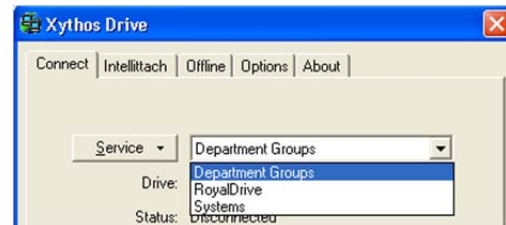
Or

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.

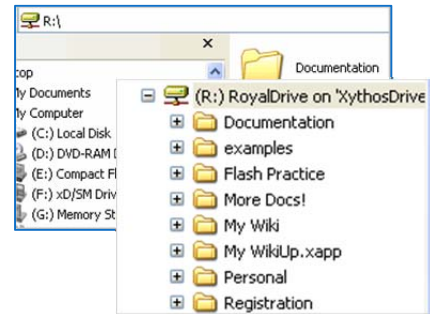


**Very Important** – To log into a specific service click on the drop down arrow to choose the service.



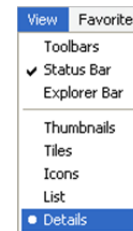
### Offline access

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

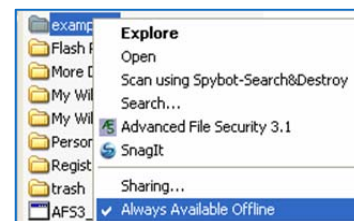


*How to:*

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.



### Synchronization options

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 – immediately synchronizes the local copies files selected as *Always Available Offline* with the corresponding files on the server.

