

FileSphere Personal 2008 User Help



FileSphere Personal User Help

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Help system updates:

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Version	Date	Detail	FileSphere Release
4.1.1	09/2007	New feature: <ul style="list-style-type: none">• Direct email of document shortcuts (Send to Mail Recipient)• Insert field (FileSphere metadata field) Addition of support for: <ul style="list-style-type: none">• Microsoft Office 2007 (Microsoft® Excel®, Microsoft® PowerPoint®, Microsoft® Project, Microsoft® Visio®, Microsoft® Word)• Windows Vista™• Adobe® Acrobat® 8.0 Professional	4.1.234
4.1.0	06/07	FileSphere Personal 2008 release Addition of support for: <ul style="list-style-type: none">• Microsoft® Project, Microsoft® Visio®	4.1.225
3.1.5	11/2006	Review & update	3.1.218
3.1.4	07/2006	Review & update	3.1.215
3.1.3	04/2006	Review & update	3.1.209
3.1.2	01/2006	Addition of <ul style="list-style-type: none">• Support for Microsoft .NET Framework 2• Shortcuts to FileSphere documents• View document (read only)• Free metadata search	3.1.201
3.1.1	11/2005	Addition of file access levels (<i>Professional / Enterprise only</i>)	3.1.196
3.1.0	10/2005	First issue for FileSphere 2006, which includes <ul style="list-style-type: none">• Oracle support and SQL Server SP4 support (<i>Enterprise only</i>)• Automatic capture and classification of emails/attachments using Microsoft® Outlook® Rules.• Creating pickup folders from Outlook® Inbox folders to automatically add emails/attachments to FileSphere.• Integration with Adobe Acrobat Professional 7.0• Support for Adobe XMP (Extensible Metadata Platform)	3.1.191



Please always check the FileSphere website www.filesphere.com for the latest documentation.

To update the online Help Systems:

- ▶ Download the latest versions of User and Administration Help from the website
- ▶ Rename the User Help to FileSphere.chm and the Administration Help to FileSphereAdmin.chm
- ▶ Copy the help files into the FileSphere Help folder, overwriting the previous versions. You will find the FileSphere Help folder in the location in which FileSphere was installed, the default location is C:\Program Files\FileSphere Personal\Help

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FileSphere technology patent pending.



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About FileSphere Help

FileSphere includes documentation in two online help file systems: **User Help** and **Administrator Help**.

The **User Help** system (this help system) provides information on all aspects of FileSphere required for everyday document management.

You can access **User Help** in the following ways:

- ◆ Press the **F1** key or select **Help Topics** from the **Help** menu in **Windows Explorer** when a FileSphere space is selected
- ◆ **Windows Start menu**, point to **Programs**, point to **FileSphere Personal**, select **Help**

The **Administrator Help** system provides information required for setting up, administering and maintaining FileSphere.

You can access **Administrator Help** in the following ways:

- ◆ **Windows Start menu**, point to **Programs**, point to **FileSphere Personal**, select **Administrator Help**
- ◆ Press the **F1** key or the **Help** button on the **FileSphere Administration** console toolbar

Related documentation

Other FileSphere documentation available on the FileSphere installation CD and from the FileSphere website (www.filesphere.com) includes:

- ◆ Getting Started* (PDF)
- ◆ Quick Tour* (HTML)
- ◆ Self-paced Tutorial* (PDF)
- ◆ User Help in document format (this help system) (PDF)
- ◆ Administration Help in document format (PDF)
- ◆ Installation, Administration & Technical Reference Guide (*FileSphere Professional & Enterprise*) (PDF)
- ◆ [FAQ](#)



See also

[Help system conventions](#)

[Glossary](#)



















Help system conventions

This section explains the conventions used to denote FileSphere spaces and functions and the icons used to denote notes or advice to the reader.

When you see...	This means...	An example of this is...
Blue, underlined , mouse pointer changes to a hand when it hovers over it.	Indicates a link to another topic in this help system.	Use the FileSphere options within Microsoft Outlook to add email messages and attachments
Blue, underlined , which changes when your mouse pointer hovers over it; to bold, deep orange text and displays a popup message	Indicates a popup tip: click on the tip to display a popup text box which provides a short description of the item.	
Bold dark blue text	A major component of FileSphere, such as a space or folder.	All documents are displayed in the Document Space
Bold dark yellow text	A reference to Microsoft Windows, Office or Outlook.	In the Windows Explorer view of FileSphere...
Bold deep orange text	A FileSphere specific item or function	► Click the FileSphere menu
Bold light blue text on light grey background	A FileSphere specific button or menu item	► Click the Open button or select Open from the FileSphere menu
► Solid dark blue arrow bullet point	An action to be taken by the reader	► Right click on a document and select Remove
Bold black text	What a user is required to enter, click or select	► Right click on a document and select Remove t
◄ Solid light blue reverse arrow bullet point	An action taken by FileSphere	◄ FileSphere places a copy of the document in your Workspace
Bold grey text on light grey background	A generic Windows button	► Click the OK button
Bright blue text	A document property tag	The properties of Project , Task , Client and Product are displayed on the View By menu
Italic bright blue text	A property tag value	Product folders were displayed for Product X , Product Y and Product Z
Dark red text	Status of a FileSphere document	This changes the document's Status in the Document Space to Checked Out
Bold white text on dark grey background	A page / window / dialog box name	The Properties dialog box displays four tabs
Bold deep orange Text with a grey background	A dialog box tab name	► Click the Options tab
Bold, italic, right blue text	An optional alternative	► Click the Open button or select Open from the FileSphere



		menu
Bold purple text	A reference to a related document or website	The latest information is available from the FileSphere website, www.filesphere.com
Light blue text in square brackets	Navigation to access the item or function described	[Navigation: FileSphere icon > Document Space > Document]
	Indicates links, which describe How to perform/access functionality described in the current topic.	 How to Open previous versions
	Indicates links to topics that are related in some way to the current topic.	 See also Deleting previous versions
	A note below a topic that gives extra information about the topic.	 These documents can be restored from the Shredder .
	A warning note	 If you select this option documents will be permanently deleted from FileSphere
	A paragraph that provides hints, tips and recommendations for working with FileSphere.	 You can collapse View Folders by clicking the View By button
	Refers to a function that should be carried out by advanced FileSphere users (power users) only	 Only users that have a good working knowledge of FileSphere, should attempt this.
	Refers to a function that is restricted to users with administrative level access rights	 You must have document management access rights to change document security
	Refers to a FileSphere Administration function	 Managing schemas is a FileSphere Administration task (Refer to the FileSphere Administrator Help for further information [Windows Start menu > Programs > FileSphere Personal > Administrator Help]).
Bold deep red text	Refers to the FileSphere Administration console	
Magenta text	Indicates restricted access rights to a function	
Bold teal text	A FileSphere Administration component or object	The Notification service tracks system events and provides notification of when they occur



See also












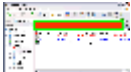




[Glossary](#)[About FileSphere Help](#)









Glossary

FileSphere icons are displayed in **Windows Explorer** and the **Open** and **Save** dialog boxes of supported **Microsoft Office** applications.

FileSphere buttons are displayed on: the **Standard toolbar** in **Windows Explorer** and supported **Microsoft Office** application **Open** and **Save** dialog boxes; and the **Filesphere toolbar** in supported **Microsoft Office** applications.

Add Documents button		The Add Documents toolbar button opens the Open window to allow you to locate and select documents to add to FileSphere.
Document Space		A Document Space is a repository of FileSphere documents from where documents are managed and checked in and checked out to maintain version control. Documents are classified, retrieved, edited and tracked in that Document Space .
Favorites		The Favorites space, found under My Workspace , gives you quick access to documents through a list of document shortcuts.
FileSphere icon		The FileSphere icon marks the boundary of FileSphere on your computer.
Finalize button		On the Filesphere toolbar in supported Microsoft Office applications. Finalizes (publishes), closes and returns the active document.
Ghost Folder		Ghost Folders are dynamic virtual folders used for classifying documents. Unlike View Folders they do not contain documents, they simply represent a property and a property value that exists in FileSphere but with which no documents are classified in the current view. A document inherits this property value when added to a Ghost Folder . Ghost Folders can be created using the New Folder button.
Ghost Folder button		The Ghost Folder toolbar button turns display of Ghost Folders on/ off.
History button		The History toolbar button turns display of the History pane on/ off in My Workspace , In Tray or Out Tray .
My Workspace		My Workspace is your personal workspace, similar to your desk area. It holds copies of documents that you are working on and is the first space displayed beneath the FileSphere icon. Documents in My Workspace are checked out from the Document Space and cannot be edited by others. My Workspace has an In Tray , an Out Tray and a Favorites space in which you can keep links to documents that you access frequently.
New Folder button		The New Folder toolbar button creates a new folder for the currently selected property . The button arrow allows you to select a property to create New Folder from.
Open		On the Filesphere toolbar in supported Microsoft Office applications. Displays the Open dialog box to allow you to select a FileSphere document to open.
Retrieval Bar		The Retrieval Bar is displayed at the top of the Document Space contents pane. To quickly locate documents, you can enter document property and value selections, aided by the quick prompts.
Retrieval Bar button		The Retrieval Bar toolbar button turns display of the Retrieval Bar on/ off.
Retrieve using values button		The Retrieve using values button, displayed on the right side of the Retrieval Bar , toggles between using properties or values and properties for retrieval.
Save		On the Filesphere toolbar in supported Microsoft Office applications. Saves the active document into FileSphere.
Search		If you are unable to locate files using the Retrieval Bar ; or View By to create View Folders ; or if you just prefer to search for documents, FileSphere provides you



		with a Quick Search Toolbar and an Advanced Search .
Search button		The Search button turns display of the Quick Search Toolbar and search results pane on/ off .
Shredder		Shredder is FileSphere's equivalent of a recycle bin, which stores FileSphere documents as you delete them. Documents can be permanently deleted or restored from the Shredder .
Static Folder		Static Folders are regular Windows folders. They can be used to add documents contained in an existing folder hierarchy to FileSphere to assist in the document migration process. They can also be used solely as a wrapper to maintain a specific association between certain documents.
Unclassified button		The Unclassified toolbar button turns display of documents that are unclassified for the current View (the currently selected property) on/ off .
View By		View By is the action of selecting a property to group documents by. Documents are grouped into View Folders for each value found for the selected property. View By is accessed using the View By button or the View By menu option on the right click menu of Document Space , Network Peer , Shredder or Templates .
View By button		The View By toolbar button turns View Folders for the currently selected property on/ off . The button arrow allows you to select a property to create View Folders from.
View Folder		View Folders are dynamic virtual folders created by grouping documents with common classification. They are used for classifying, filtering and retrieving documents. Each View Folder represents a property and a property value . A document inherits this property value when added to a View Folder . View Folders are created by using the View By function and selecting a property , which groups the documents with the same value for the selected property . View By can be repeated within a View Folder to create a hierarchy of folders.



See also

[About FileSphere Help](#)

[Help system conventions](#)



Introduction

[Overview of FileSphere](#)

[Features comparison - Professional, Enterprise & Personal](#)



Overview

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What is FileSphere?

FileSphere is an electronic mail, document and file management system. It provides automatic classification and automatic version management together with a natural way of storing, retrieving, managing and sharing most common types of files, including email, Microsoft Office document, Adobe PDF document, scanned document, text, image, spreadsheet, presentation, music and video. [^top](#)

Zero Interface email & document management

FileSphere is a zero interface application because it is embedded in Microsoft Windows, **Microsoft Office** and **Adobe Acrobat Professional**, and it requires no separate application interface. This provides users with the power to manage all documents from within **Windows Explorer**; **Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Visio**, **Microsoft Word**, **Microsoft Outlook**; and **Adobe Acrobat**. Emails and email attachments can be classified and added to FileSphere individually from **Microsoft Outlook** or they can be automatically captured and classified from the **Inbox** or the **Outbox**, using **Microsoft Outlook** Rules.

Optional FileSphere plug-ins provide additional zero interface embedded functionality. The FileSphere PDF plug-in enables the simultaneous creation, classification and addition of PDF files to FileSphere from within any application and the Lotus Notes plug-in enables emails and attachments to be added directly to FileSphere from within Lotus Notes.

FileSphere also enables regular file system folders and **Microsoft Outlook** Inbox folders to be designated as pickup folders with specified classification. Files copied to, or saved in, a FileSphere pickup folder are automatically added to FileSphere and classified, according to the folder's pre-defined classification. [^top](#)

How FileSphere operates

FileSphere operates by providing a **Document Space**, from where you can manage, classify and retrieve emails, documents and files. A system of checking documents in and out of the **Document Space** is used to control versioning.

A local workspace, **My Workspace**, indicates documents that have been checked out or are being worked on. [^top](#)

Simple sharing & collaboration

FileSphere can be set up to allow local, central or combined local and central management of documents. File sharing is achieved by connection to **Document Spaces** of other computers, referred to as Network Peers. The FileSphere In Tray and the Out Tray, located in My Workspace facilitate collaboration between FileSphere users. [^top](#)

Which edition of FileSphere?

In small to medium enterprises with a distributed environment, FileSphere Professional is designed to act as both a server and a client. Each user can manage documents locally in their own **Document Space** and, by connecting to Network Peers, they can share their **Document Space** as well as access the **Document Spaces** of other users.

FileSphere Enterprise is specifically designed to perform the server role in a centralised environment, with FileSphere Professional as the desktop client. FileSphere Enterprise provides a centralised environment for security, auditability and management of users, documents and applications.

FileSphere Personal is a standalone edition that provides the document management functionality of FileSphere Professional but has no document sharing and collaboration ability, no automatic email capture and fewer administrative tools. [^top](#)



Intuitive classification

Classification occurs automatically when you add documents to FileSphere because the document's native application (file type) properties (metadata) are transferred to FileSphere. For example, a Word document, a PowerPoint presentation and an Excel spreadsheet will bring with them Title, Subject, Author and Company; an MP3 music file will bring with it Album, Track, Artist, Composer and Genre; an email will bring with it From/To, Cc, Bcc, Date Sent/Received etc; and an Adobe PDF document will bring with it Title, Subject and Author (support for Adobe XMP metadata is built into FileSphere). If you wish to see what type of properties are transferred with a document to FileSphere, when the document is open select Properties / Document Properties from the File menu.

Further classification can be given to documents using simple drag & drop or easily accessible classification prompts in document properties in Windows Explorer or when documents are being saved in Microsoft Office applications. Additional classification is based on business schemas, which can be fully customised to suit the classification requirements of your organisation. [^top](#)

Virtual folders

Instead of storing your documents in a traditional hierarchical folder structure, FileSphere simply tags your documents and uses the tags to group documents into virtual View Folders. FileSphere tags, which are made up of property and value pairs provide extensive document classification and retrieval capabilities.

FileSphere's virtual and approach with the function creates a dynamic environment in which different Views of documents can be created, allowing you to arrange, rearrange and view documents according to their property tags and your particular way of working. You can still create an hierarchy of View Folders, but the added benefit of FileSphere is that you can create the hierarchy in any order and then change the order if required.

View and Ghost Folders are dynamic virtual folders, which allow documents to learn about their environment. As you move documents into a View or Ghost Folder, they inherit the attributes (tags) of the Folder. If you move documents into a dynamic hierarchy of View and Ghost Folders, they inherit the tags of every View or Ghost Folder in the hierarchy. Ghost Folders are empty View Folders which are created to provide classification of documents, where no documents exist for a particular View (hierarchy of View Folders).

The dynamic nature and flexibility of View Folders allows different users to interact with the same documents in different ways. For example the Product Development department may View (sort) documents by product, model and launch date, while the Marketing department View the same files organised by client and campaign. [^top](#)

Easy Retrieval without searching

When you use FileSphere, you no longer need to search through a static folder hierarchy to locate a document because FileSphere presents you with documents, in a hierarchy of View Folders, which you create based on the property value tags that you select. A provides you with, easy to select, prompts to help you drill straight through a View Folder hierarchy to the document you require. [^top](#)

Restricted access levels

File access can be restricted to specified users or user group by assigning predefined access levels to documents. Users are only able to see files to which they have access. [^top](#)

Document shortcuts

FileSphere allows shortcuts to FileSphere documents, similar to Windows shortcuts, to be created on the desktop or in the file system. These shortcuts can be sent to other FileSphere users to provide them with direct access to a document. [^top](#)

Migration

, which are traditional Windows Explorer folders can also coexist within FileSphere. You can use the Migrate function from a Static Folder to assist your transition to FileSphere from your existing folder structure. [^top](#)



See also

[FileSphere Features comparison - Personal, Professional & Enterprise](#)

[How FileSphere works - the concept](#)

[How FileSphere works - the difference in retrieving documents](#)

[How FileSphere works - tags, properties and values](#)

[How FileSphere works - View By, View Folders and Ghost Folders](#)



Features Comparison

This table describes and compares the main features of

- ◆ FileSphere Personal - standalone desktop client
- ◆ FileSphere Professional - desktop client
- ◆ FileSphere Enterprise/Professional - server edition

DOCUMENT CLASSIFICATION & RETRIEVAL			
Feature	Personal	Professional	Enterprise/Professional
Metadata Based Document Classification Provides a business layer for classifying documents based on characteristics they have in common. Documents can be classified according to industry specific, business specific or customisable metadata schema relevant to the user and the organisation. This allows documents to convey meaning that is not conveyed by the name of the document and makes it easy to detect duplicate documents.	single customisable schema ✓	✓	✓
Dynamic Document View Users can dynamically organise the document store into a personalised view based on the user's metadata selection. This allows users to navigate through a large document store to find documents quickly.	✓	✓	✓
Drag and Drop Classification Users can simply drag and drop documents into a folder to automatically classify them. This dramatically reduces the time taken classify documents when compared against most present day solutions.	✓	✓	✓
Enforced Classification Document classification can be enforced throughout an organization using schema properties ensuring essential metadata elements have values.	✓	✓	✓
Enterprise Navigation By allowing users to dynamically organise their document hierarchy, they can navigate to documents quickly and no longer need to remember the names of documents or their storage location to find files.	✓	✓	✓
Enterprise Search Provides comprehensive keyword search functionality within document content, metadata values and metadata attributes across the entire document store. This allows users to quickly find all documents relevant to a particular keyword.	✓	✓	✓
Internet, Web Portal and Desktop Access			
By allowing users to dynamically organise their document hierarchy, they can navigate to documents quickly and no longer need to remember the names of documents or their storage location to find files.			
◆ FileSphere's Desktop Toolbar allows quick access to documents and document spaces from the user's enterprise desktop.	✓	✓	✓
◆ FileSphere's RetrieveAll Toolbar simplifies document access providing the power of the FileSphere's Windows Explorer Retrieval Bar on the user desktop or from within an enterprise Portal.	✓	✓	✓
◆ FileSphere's Web Interface allowing remote or mobile users to quickly manage documents from wherever they are	✓	✓	✓
DOCUMENT LIFECYCLE MANAGEMENT			
Document Templates Template documents can be accessed through the Template space	✗	✓	✓



providing unified and quick access to an organisation's standard templates and master documents.

Creating and Adding Documents

✓ ✓ ✓

New documents can be created and automatically classified from within FileSphere's Windows Explorer interface. Documents can also be manually added using drag and drop or using right click from the local file or from within FileSphere's Windows Explorer interface.

Existing documents can be automatically added and classified from the local file system using Pickup Folders.

✗ ✓ ✓

Automated Document Versioning

Document versions are controlled automatically, with versioning automatically performed when documents are opened for editing (checked out) and returned (checked in).

✓ ✓ ✓

Document Publishing / Finalization

Documents can be marked as finalized, once published. Comments can be added to the document and the major version is automatically updated.

✓ ✓ ✓

PDF Conversion

Using the FileSphere PDF Add-In, files can be converted to PDF classified and added to the file repository from within any supported application.

✗ ✓ ✓

Document Retention

Individual documents or groups of documents can be set to expire on a certain date. Expired documents are moved into an 'expired' section, where an administrator is responsible for their removal and archiving, once this date is reached.

✗ ✓ ✓

Document Disposal

Deleted documents are sent to the Shredder where they are removed from the file store. An administrator is then responsible for their ultimate removal from the system.

✗ ✓ ✓

Document Migration

The migration utility allows file system folder hierarchies to be moved or copied into the repository and the documents, contained within, to be migrated using smart classification.

✓ ✓ ✓

DOCUMENT COLLABORATION & WORKFLOW

Personal Workspace

FileSphere provides a virtual office desktop, with:

◆ My Workspace – a space for active documents	✓	✓	✓
◆ In Tray – a space for documents received from peers	✗	✓	✓
◆ Out Tray - a space for documents sent to peers	✗	✓	✓
◆ Favourites - a space for shortcuts to commonly accessed documents	✓	✓	✓

Each of these spaces contains a history pane, providing a comprehensive log of activity for security and audit purposes and as 'recent documents'.

Document Status

Document status details, such as checked in, checked out, finalised, number of versions, are clearly displayed to all users

✓ ✓ ✓

Document Sharing and Review

To facilitate document review and assist work processes, users can send

✗ ✓ ✓



other FileSphere users documents or shortcuts to documents. Shared documents include tracking, showing the sender, the time and any additional comments.

Sent and Received Document Notification

A system tray message notifies users when documents are sent or received. Documents are automatically added to the user's In Tray when received and a log of the transaction is added to the sending user's Out Tray.

✗ ✓ ✓

Offline Document Editing

Documents opened for editing are checked out to a user's Workspace. A local copy of the document allows the user to disconnect from the central file store with the document available for checking in when editing is complete and once the user is back online.

✓ ✓ ✓

Document and Document Group Shortcuts

Shortcuts to FileSphere documents and groups of documents can be created outside FileSphere. FileSphere Shortcuts can then be used for linking to files or for file sharing and collaboration in a similar way that standard Shortcuts operate within the file system.

✗ ✓ ✓

Automated Document Capture

Files can be automatically classified and added to FileSphere from within any supported application by using designated pickup folders on the file system.

✗ ✓ ✓

Scanner Integration

Scanned images can be added to the file store directly from any Twain compatible device including scanners and digital cameras.

✗ ✓ ✓

Fax and Printer Integration

Any electronic files can be automatically classified and added to FileSphere from designated pickup folders on the file system.

✗ ✓ ✓

ADMINISTRATION & SECURITY

Central Management

Administration, file management and information storage and is performed centrally to ensure the implementation of enterprise wide policy and security and to prevent unauthorised file access.

✗ ✗ ✓

Microsoft Active Directory Support

Supports Windows Active Directory, allowing administrators to centrally manage authentication and authorization services, assign policies and deploy software updates directly to client systems.

✗ ✗ ✓

Familiar Administration Interface

FileSphere's administration interface is displayed in a Microsoft Management Console (MMC) window, providing an intuitive and familiar environment for administrators to manage FileSphere functionality.

classification admin only ✓ ✓

Comprehensive Administration

The administration console provides access to all administrative tasks including security and access control; auditing, monitoring and activity logs; classification schemas; services; file storage settings; and management of deleted and expired documents and versions.

classification admin only ✗ ✓ ✓

Document Level Access Control

Similar to Windows, users and group access can be granted/denied to individual documents or groups of documents.

✗ ✓ ✓

User and Group Access Control

File access can be controlled by assigning groups or users to specified access levels and then assigning access levels to documents. Users can only see files to which they have access.

✗ ✓ ✓

History and Audit Trail

Maintains full document lifecycle and historical information for each file and its revisions. Information is kept about each document transaction including the type of access, the time and date and credentials of the user who accessed it. All activity logs are sortable and exportable with document history logs able to be exported to plain text or comma delimited CSV file.

✗ ✓ ✓

✗ ✗ ✓



Multiple Document Repositories

Multiple document spaces can be used to cater for situations where separate business divisions each require a separate repository. Each file repository can be physically distributed across multiple drives to increase efficiency and capacity, appearing as one repository to the user.

Enforced Use of Document Management

FileSphere can be configured, using Windows Group Policy, to enforce saving of files to the file store from within Microsoft Office applications. This prevents users from creating and saving Microsoft Office files on their local files systems.



Files Maintained in their Native Format

FileSphere maintains files in their native format, enabling administrators to restore files without having to use FileSphere.



Backup and Restore

To backup the entire file repository, including files, versions, metadata and schemas, FileSphere provides a Backup and Restore tool. Backup's can be used to transfer a file store from one repository to another or for backing up the repository.



Import and Export

FileSphere maintains files in their native format, enabling administrators to restore files without having to use FileSphere.



Scalability and Performance

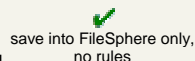
To enhance performance and scalability, FileSphere Enterprise utilises Microsoft Internet Information Services for enhanced web services communications and Oracle or Microsoft SQL Server for enhanced file metadata management.



ENTERPRISE INTEGRATION & EMAIL MANAGEMENT

Microsoft Outlook Integration

Allows classification and automatic addition of individual emails and attachments to the file repository from within Microsoft Outlook using email rules or folder property rules.



Mail Server Integration

Allows classification and automatic addition of individual emails and attachments to the file repository directly from email servers using server rules.



Enterprise Desktop Integration

FileSphere is embedded in the Microsoft Windows Explorer providing a familiar application interface for users. It is integrated with Microsoft Office and OpenOffice applications, and supports Adobe Acrobat Professional and Lotus Notes.



Client API

FileSphere API's provide third party organisations a development interface for integrating information management into any enterprise or web application.



See also

[Overview](#)



How FileSphere Works

[The concept](#)

[The difference in retrieving documents](#)

[About properties and values \(tags\)](#)

[About View By and View and Ghost Folders](#)



The concept

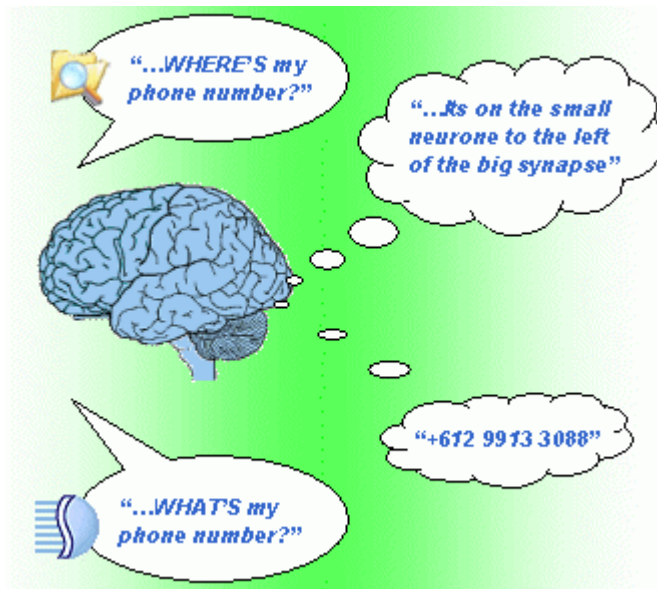
FileSphere is a completely new approach to filing, storing and retrieving documents.

Traditionally, documents are stored in a static folder hierarchy which is dependent on the names of folders and human memory, to classify and retrieve documents.

FileSphere classifies and retrieves documents using the power of your computer, instead.

One way of looking at this to consider what happens when someone asks you for your phone number?

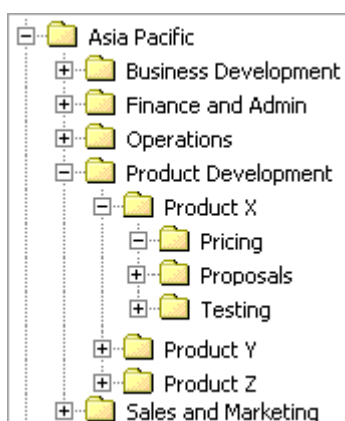
Do you look around your brain and say ..."It's on the small neurone to the left of the big synapse"



No, because your brain stores and retrieves information using an associative process and FileSphere works in a similar way. You no longer need to remember WHERE you've filed something, all you need to know is WHAT you're looking for.



When you see a document displayed in Microsoft Windows Explorer, you are viewing an icon representing the document in the location where it is stored.



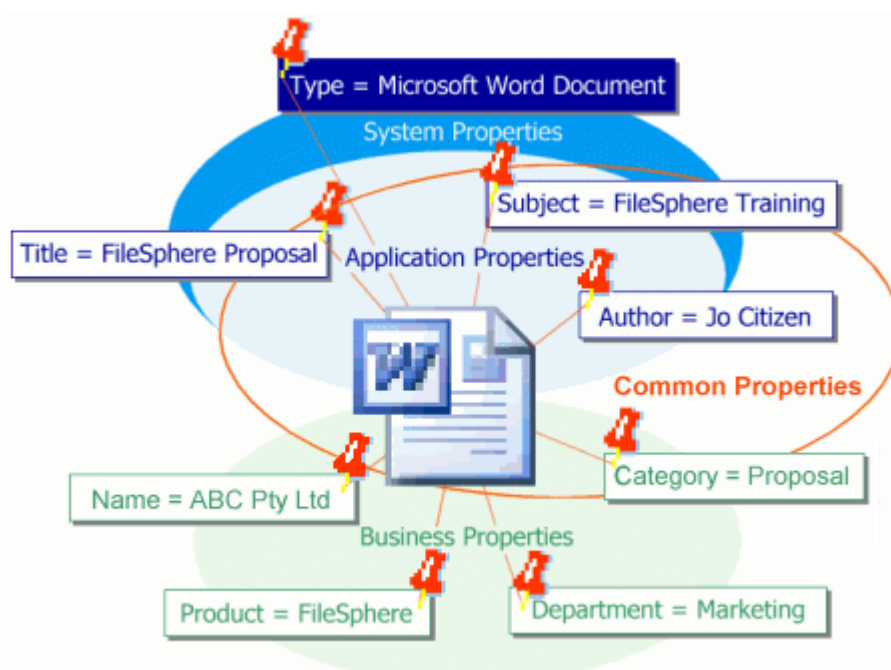
The document is identified by its file name and a fixed path, which defines its location. Storing files in this way is based on the filing cabinet principle with multiple locations arranged in a static hierarchical structure.

With **Microsoft Windows Explorer**, to retrieve a document you need to know WHERE to look, you need to remember the name and sequence of the folders (file path) in which the document is stored.



When you see a document displayed in FileSphere, you are viewing an icon representing a link to the document, which is stored along with all other FileSphere documents in one central location.

Since FileSphere documents have no concept of location, instead of using file path to identify documents, FileSphere's associative process uses a set of document tags. Each tag comprises a **property** and a **value**. For example, with the document illustrated below an example of a **property** is **Product** and its **value** is **FileSphere** [**Product=FileSphere**].



FileSphere uses the **property** and a **value** tags to allow you to organise documents into meaningful groups, known as **View Folders**. The special feature of **View Folders** is that they can be created and recreated inside other **View Folders**, all to assist you in retrieving your documents, without changing the documents in any way. **View Folders** have the added benefit of allowing documents placed in them to inherit their tags, saving you the effort of adding tags yourself.

To retrieve a FileSphere document, all you need to know is WHAT you are looking for.



See also




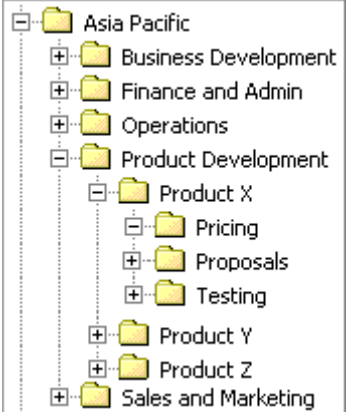

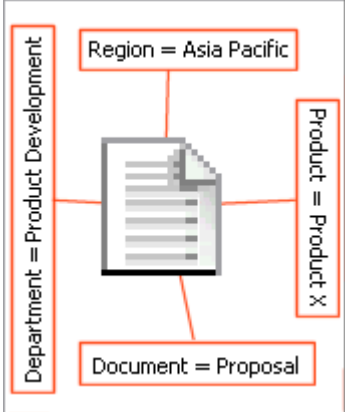
[How FileSphere works: the difference in retrieving documents](#)

[How FileSphere works: about properties and values \(tags\)](#)

[How FileSphere works: about View By, View Folders and Ghost Folders](#)



The difference

 <p>With Microsoft Windows Explorer, to retrieve a document you need to know WHERE to look, you need to REMEMBER the name and sequence of the folders (file path) in which the document is stored.</p>	 <p>To retrieve a FileSphere document, all you need to know is WHAT to look for.</p>
 <p>In Windows Explorer, this document is in:</p> <p>the folder called Asia Pacific</p> <p>which is in the folder called Product Development</p> <p>which is in the folder called Product X</p> <p>which is in the folder called Proposals</p> <p>and is called Document.doc</p> 	 <p>In FileSphere, the same document is tagged (classified):</p> <p>Region=Asia Pacific</p> <p>Department=Product Development</p> <p>Product =Product X</p> <p>Document=Proposal</p> <p>and is called Document.doc</p> 
<p>To retrieve this document you must REMEMBER and go to:</p> <p>\\Asia Pacific\Product Development\Product X\Proposals\Document name.doc</p>	<p>To retrieve this document you can View your documents by any combination of tags in any order:</p> <p>If you take a View By Region you will see this document in the Asia Pacific View Folder</p> <p>If you take a View By Product you will see this document in the Product X View Folder</p> <p>If you take a View By Product and then in the Product X View Folder, take a View By Region you will see this document in the Asia Pacific View Folder within the Product X View Folder.</p> <p>or you can use the Retrieval Bar and it will prompt you with properties and values to enter Region=Asia Pacific/Department=Product Development/Product =Product X/Document=Proposal and drill down directly to the document</p>



See also

[How FileSphere works: about properties and values \(tags\)](#)

[How FileSphere works: about View By, View Folders and Ghost Folders](#)

[How FileSphere works: the concept](#)



About properties and values

The tags used to classify FileSphere documents are made up of two components, a [property](#) and a [value](#) and they are derived from the document's associated application, native file properties and optionally, a set of user defined business properties. Another name for these tags is metadata, which just means "*data about data.*"

The [property](#) components for these tags are set up in tables known as schemas.



Setting up and managing schemas is a FileSphere Administration task restricted to users with FileSphere Administration access rights. Refer to the FileSphere Administrator Help for further information (Windows Start menu > Programs > FileSphere Personal > Administrator Help).

Some examples of [property](#) [value](#) tags are shown below:

Property	Value
Title	<i>XYZ Launch Plan, Company Overview, Sales Presentation</i>
Subject	<i>XYZ Product Launch, Price Increase</i>
Company Name	<i>Acme Pty Ltd, Andersons, Arthur and Sons</i>
Category	<i>Advertising, Purchasing, Customer Service</i>
Business Unit	<i>Administration, Sales, Operations</i>
Event	<i>TGB Exhibition, Roadshow, MDC Seminar</i>



See also

[How FileSphere works: View By, View Folders and Ghost Folders](#)
[How FileSphere works: the concept](#)
[How FileSphere works: the difference in retrieving documents](#)



About View By and View and Ghost Folders

The **View By** option, which is available as a button and on the right click menu, allows you to select a **property** and create **View Folders** and **Ghost Folders** in a **Document Space**, **Templates**, **Shredder** or other **View/Ghost Folders**.

View Folders and **Ghost Folders** are dynamic virtual spaces that represent **values** for a selected **property** tag.

View Folders contain documents that have **values** for the selected **property** tag.

Ghost Folders are the equivalent of empty **View Folders** and they represent **values** found in the current **Document Space** but for which there are no documents in the current view. When you see a **Ghost Folder** it means that either documents exist in a different view, which have values for the selected property, **or** that a new folder has been manually created in the system using the **New Folder** button.



Ghost Folders are hidden from display by default, when FileSphere is installed. You can toggle their display on and off using the **Ghost Folders** button **or** the keyboard shortcut **Ctrl+G**.

A special feature of **View** and **Ghost Folders** is that documents placed in them are automatically classified. This classification occurs because documents inherit the **View** or **Ghost Folder's property value** tag. If a **View** or **Ghost Folder** is added to a dynamic hierarchy of **View** and **Ghost Folders**, documents inherit the **property value** tags of all higher **Folders** in the hierarchy also. This is a tremendous time saver because rather than manually classifying documents, you can drag and drop one or many documents into **View/Ghost Folder** hierarchies and automatically classify them.

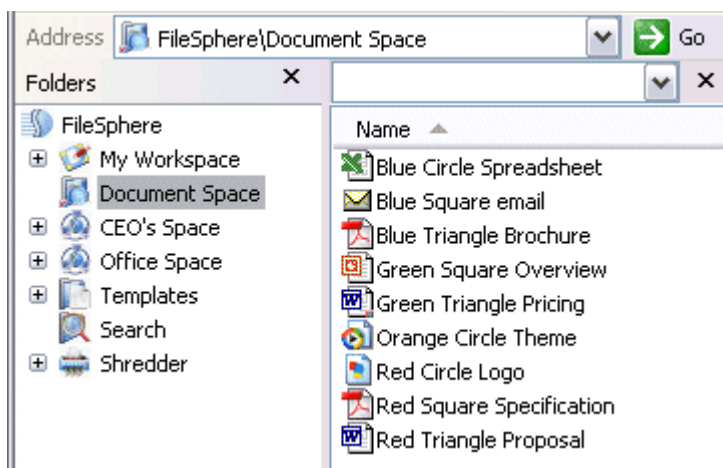


Once a document is added to a **Ghost Folder**, the folder becomes a **View Folder**.

The benefit of **View Folders** is that they let you classify and retrieve documents in the way that best suits the way in which they work. There is no need for example, for the **Pricing Department** to have a copy of a document in the **Pricing** folder, which is the same document that the **Product Marketing Department** has in their **Product Pricing** folder, which is the same document that the **Salesperson** has in their **Product Information** folder. The one document can be tagged so that anyone can **View By Pricing** and **Product** and retrieve the document. Not only does this make it easier to retrieve the document but it also eliminates the need for multiple copies and versions of the document.

You can also use **View/Ghost Folders** to change **property value** tags. For example, if you have a **Product View Folder** for **Product X** and **Product X's** name has been changed to **Product X Professional**, you don't have to change every document, you just have to **Rename** the **Product X View Folder** to **Product X Professional** and all the documents it contains will be reclassified (retagged).

An example is provided below for you to see how **View** and **Ghost Folders** work. Take a look at these nine documents, which have been tagged for shape and colour. For the purpose of this example, their respective names give an indication of how they are tagged.

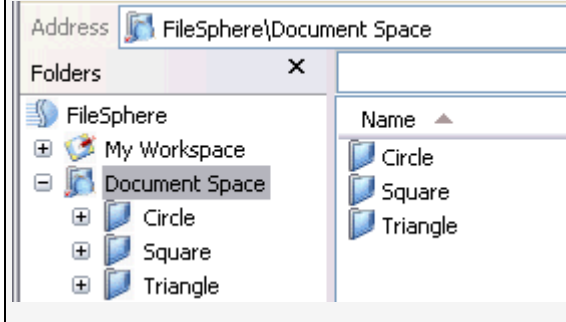


	Tag 1			Tag 2	
Document Name	Property	Value		Property	Value
Blue Circle Spreadsheet.xls	Shape	Circle		Colour	Blue
Blue Square Email.msg	Shape	Square		Colour	Blue
Blue Triangle Brochure.pdf	Shape	Triangle		Colour	Blue
Green Square Overview.ppt	Shape	Square		Colour	Green

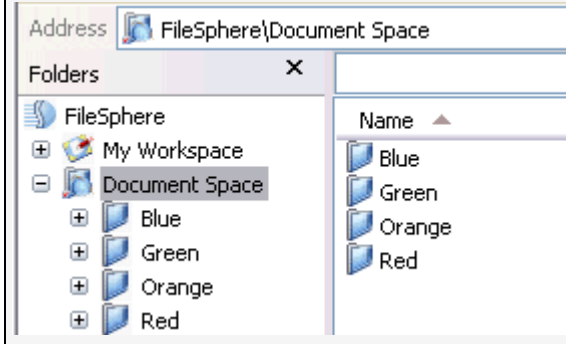


Green Triangle Pricing.doc	Shape	Triangle		Colour	Green
Orange Circle Theme.mp3	Shape	Circle		Colour	Orange
Red Circle Logo.gif	Shape	Circle		Colour	Red
Red Square Specification.pdf	Shape	Square		Colour	Red
Red Triangle Proposal.doc	Shape	Triangle		Colour	Red

If you view these documents by the **Shape** property tag you will see **View Folders** (virtual folders) for the tag values of **Circle**, **Square** and **Triangle**.

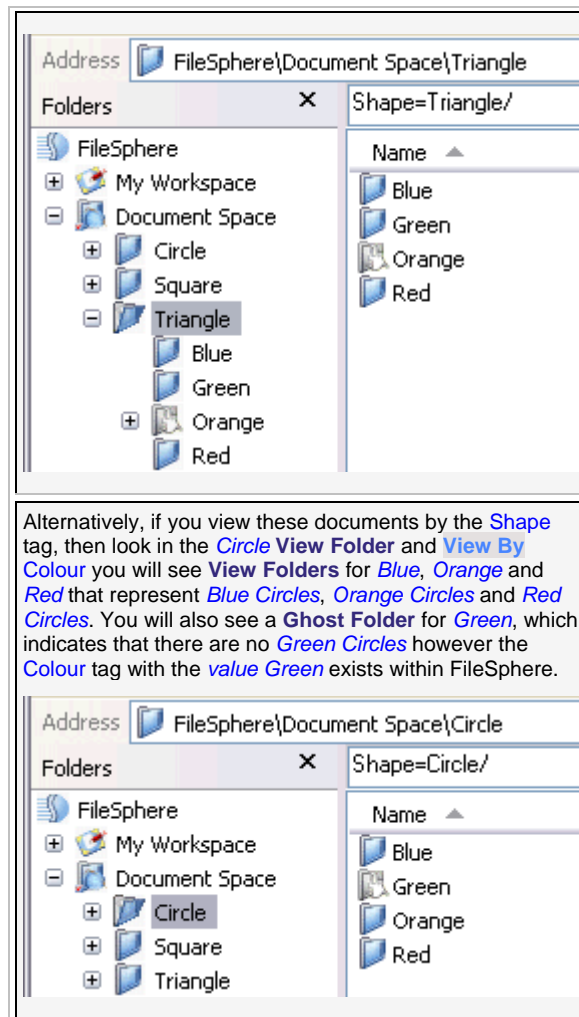


If you view these documents by the **Colour** tag, you will see **View Folders** (virtual folders) for **Blue**, **Green**, **Orange** and **Red**.



If you view these documents by the **Shape** tag and then look in the **Triangle View Folder** and **View By Colour** you will see **View Folders** that represent **Blue**, **Green** and **Red**. You will also see a **Ghost Folder** for **Orange**, which indicates that there are no **Orange Triangles** however the **Colour** tag with the **value Orange** exists within FileSphere.

If you look Inside the **Green View Folder**, for example, you will see only documents tagged with **Shape=Triangle** and **Colour=Green**



FileSphere remembers the last series of **View Folders** created before you closed **Windows Explorer**, so that your current dynamic **View Folder** hierarchy is displayed the next time you access FileSphere.



See also

- [How FileSphere works: the concept](#)
- [How FileSphere works: the difference in retrieving documents](#)
- [How FileSphere works: about properties and values \(tags\)](#)



Accessing FileSphere

[About accessing FileSphere](#)

[In Windows Explorer - Folders pane](#)

[Via the Windows desktop icon](#)

[In supported Microsoft Office applications](#)

[In Microsoft Outlook](#)

[In Adobe Acrobat Professional](#)

[Via the Windows Start menu](#)



About Accessing FileSphere

You can access **FileSphere** in the following ways:

- ◆ In **Windows Explorer** - **Folders pane**
- ◆ Via the **Windows** desktop **FileSphere icon**
- ◆ In supported **Microsoft Office** applications using the **FileSphere menu** or the **FileSphere toolbar**
- ◆ In **Microsoft Outlook** using the **FileSphere menu**
- ◆ In **Adobe Acrobat Professional** using the **FileSphere toolbar**
- ◆ Via the **Windows Start menu**
- ◆ In any application using the **FileSphere PDF Add-in**, if the FileSphere PDF Add-in is installed.



Accessing FileSphere in Windows Explorer

- ▶ Open **Windows Explorer**
- ▶ **Double click** on the **FileSphere** icon in the left **Folders** pane (if the Folders pane is not displayed, click on the **Folders** button on the toolbar).
- ▶ The **FileSphere** space will be expanded to show the rest of the **FileSphere** spaces.



See also - Accessing FileSphere:

- [Via the Windows Desktop Icon](#)
- [In supported Microsoft Office applications](#)
- [In Microsoft Outlook](#)
- [In Adobe Acrobat Professional](#)
- [Via the Windows Start menu](#)



Accessing FileSphere via the Windows desktop icon

- ▶ **Double click** on the **FileSphere** desktop icon **or right click** on the **FileSphere** desktop icon and select **Open** from the drop down menu.
- ▶ Click on the **Folders** button on the toolbar to display the Folders pane.
- ▶ The **Windows Explorer** window opened shows **FileSphere** spaces only. The drives, folders and files you usually see in **Windows Explorer** will not be displayed and cannot be accessed through this window.



See also - Accessing FileSphere:

- [In supported Microsoft Office applications](#)
- [In Microsoft Outlook](#)
- [In Adobe Acrobat Professional](#)
- [Via the Windows Start menu](#)
- [In Windows Explorer - Folders pane](#)



Accessing FileSphere in Microsoft Office applications

Supported **Microsoft Office** applications allow you to work with documents while FileSphere manages the documents and maintains version control. FileSphere options are provided on the **FileSphere menu** and the **FileSphere toolbar**. You can create documents and view, edit and save existing documents all within FileSphere, without leaving the document application.



How to

[Open documents](#)

[Save documents](#)



See also - Accessing FileSphere:

[In Microsoft Outlook](#)

[In Adobe Acrobat Professional](#)

[Via the Windows Start menu](#)

[In Windows Explorer - Folders pane](#)

[Via the Windows Desktop Icon](#)



Accessing FileSphere in Microsoft Outlook

You can **manually** add individual emails and email attachments directly to FileSphere from **Microsoft Outlook** using the options provided on the **FileSphere menu**. FileSphere will warn you if you try to add an email or an attachment more than once. When you print an **Outlook** email item, the printout shows whether the email has been added to FileSphere or not.

You can set up **Outlook** Rules to **automatically** select, capture and classify emails and email attachments as you receive them or send them. Alternatively, if you already have your Inbox organised such that emails are automatically placed into predefined folders, you can convert these folders to Pickup Folders by setting up folder rules so that emails are classified and added to FileSphere as the folder receives them.



How to

[Manually add an email to FileSphere](#)

[Manually add email attachments only to FileSphere](#)



See also - Accessing FileSphere:

[In Adobe Acrobat Professional](#)

[Via the Windows Start menu](#)

[In Windows Explorer - Folders pane](#)

[Via the Windows Desktop Icon](#)

[In supported Microsoft Office applications](#)



Accessing FileSphere in Adobe Acrobat Professional

Adobe Acrobat Professional allows you to work with PDF documents while FileSphere manages the PDF documents and maintains version control. FileSphere options are provided on the **FileSphere toolbar**. You can create PDF documents and view, edit and save existing PDF documents all within FileSphere, without leaving **Adobe Acrobat**.



How to

[Open documents](#)

[Save documents](#)



See also - Accessing FileSphere:

[Via the Windows Start menu](#)

[In Windows Explorer - Folders pane](#)

[Via the Windows Desktop Icon](#)

[In Microsoft Office applications](#)

[In Microsoft Outlook](#)



Accessing FileSphere via the Windows Start Menu

- ▶ Click the **Windows Start** button, point to **Programs**, point to **FileSphere Personal**, and click **FileSphere**.
- ◀ A **Windows Explorer** window is opened showing **FileSphere** spaces only. The drives, folders and files you usually see in **Windows Explorer** will not be displayed and cannot be accessed through this window.

The **Windows Start** menu provides you access to the following FileSphere functions:

Administration*

Opens the **FileSphere Administration** console. Refer to the **FileSphere Administrator Help** for further information (Windows Start menu > Programs > FileSphere Personal > Administrator Help)

Document Recovery Wizard*

Starts the wizard that allows you to transfer FileSphere documents to a non FileSphere location.

FileSphere

Opens the **Windows Explorer** view of **FileSphere**

Help

Opens **FileSphere Help**

Import and Export*

Starts the **FileSphere Import Export Wizard** which allows you transfer documents, metadata and schema between **Network Peers**

Uninstall FileSphere*

Removes FileSphere from your computer, provides the ability to retain FileSphere documents if **FileSphere** is to be reinstalled.

Backup and Restore*

Starts the **Backup and Restore Wizard**. Allows you to backup/restore files from/ to a specified **Document Space** to/ from a specified folder on your computer or network.



Recommended for FileSphere Administrator users only.



See also - Accessing FileSphere:

- [In Windows Explorer - Folders pane](#)
- [Via the Windows Desktop Icon](#)
- [In supported Microsoft Office applications](#)
- [In Microsoft Outlook](#)
- [In Adobe Acrobat Professional](#)



Accessing Filesphere in OpenOffice

The FileSphere OpenOffice Plug-in allows you to work within any of its applications: Writer, Calc, Draw, Impress, etc while FileSphere manages the documents and maintains version control. FileSphere options are provided on the [FileSphere menu](#) and the [FileSphere toolbar](#). You can create documents and view, edit and save existing documents all within FileSphere, without leaving the document application.



A separate FileSphere Help system is available from the FileSphere menu within OpenOffice applications.



Tour of FileSphere

[Overview of FileSphere Documents, Spaces, & Folders](#)

[FileSphere Space](#)

[My Workspace](#)

[Favorites](#)

[Document Space](#)

[View Folder](#)

[Ghost Folder](#)

[Static Folder](#)

[Search](#)

[Shredder](#)

[FileSphere Toolbars](#)

[FileSphere Menus](#)

[FileSphere Documents](#)



About FileSphere documents, spaces and folders

FileSphere is embedded in the **Windows** operating system, **Microsoft Office** and in **Adobe Acrobat Professional**, which means you will see **FileSphere** icons when you are using **FileSphere** to manage documents in **Windows Explorer**, supported **Microsoft Office** applications, **Microsoft Outlook** and **Adobe Acrobat**. Click on any of the following icons for a short description or click on a FileSphere icon name for further details.



FileSphere icon



The **FileSphere** icon marks the boundaries of all things **FileSphere** on your computer and computer network.

All **FileSphere** documents, folders and spaces are displayed under the **FileSphere** icon (within the FileSphere sphere).

FileSphere can track documents regardless of their physical location, however, they must be registered with **FileSphere** (added to FileSphere) in order to be tracked.



Right clicking on the main FileSphere icon displays a menu giving you access to:

Administration - the FileSphere Administration Console

Restart - for restarting FileSphere for configuration changes to take affect

Properties - general FileSphere properties and settings for options and file types.

[top](#)



Document Space

The **Document Space** is the repository of FileSphere documents from where documents are managed and checked in and checked out to maintain version control. Documents are classified, retrieved, edited and tracked in the **Document Space**.

In the **Document Space** you can see whether documents are **Checked In**, **Checked Out** or **Finalized**. You can also see how many **versions** exist for a document and who it was **last edited by**.

Links to documents displayed in a **Document Space** may also be displayed in **My Workspace** (when **open** and / or **checked out**).

To locate and identify documents in the **Document Space** you can use the **Retrieval Bar** or you can group documents into **View Folders** using the **View By** function.

You may also see icons for **View Folders**, **Ghost Folders** or **Static Folders** in a **Document Space**.

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Static Folders are only displayed when no **View By** property is selected.

My Workspace



My Workspace is similar to your physical desk. It holds documents that you are currently working and it prevents others from editing them. It also provides you with a history of documents that you have opened previously.

When you open a document it is **Checked Out** from its **Document Space** and a link to the document is placed in **My Workspace**

You can also **Send** documents to **My Workspace**, to **check** them **out** so that other users cannot edit them.

When you close a document it is **Checked In** and **Returned** to its **Document Space**. If you opened the document from **My Workspace** you will be given the option of keeping it in **My Workspace** when you close it.

Closed documents in **My Workspace** can be **Returned** to **check** them back **in** to their **Document Space**

My Workspace also contains the **Favorites space**.



The **History** button on the **Windows Explorer** toolbar toggles the **My Workspace History** pane on and off. The **History** pane shows documents you have opened or checked out previously. Documents in the **History** pane represent links to the actual document and can be opened.

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Favorites

The **Favorites** space, which is found in **My Workspace**, gives you quick access to documents through a list of document shortcuts. You can use **Favorites** to keep shortcuts to documents that you access regularly or documents you are currently working with or documents you use infrequently but want to be able to access them quickly.

[top](#) **Favorites** can include shortcuts to documents in any **Document Space** on your organisation's network.



View Folder

View Folders are the key to classification and retrieval of documents in FileSphere. They are dynamic virtual folders that are created to group documents with common classification.

[top](#) When you **View By** a **property** (classification tag), documents with like **values** are grouped into **View Folders** for the selected **property**. You can create a hierarchy of **View Folders**, in order to locate a document, by using the **View By** function within **View Folders**.

When a document is added to a **View Folder** it inherits the value for the **property** that created the **View Folder**. The documents inside a **View Folder** hierarchy will have like **values** for each **property** in the **View Folder** hierarchy that they are in.



Always remember that a hierarchy of **View Folders** is a dynamic structure created by grouping documents with like tags, or to put it another way: by grouping documents with like **values** for a selected **property**. The hierarchy is not static in any way, so that you can **View By properties** in any order and then **View By** different **properties** within individual **View Folders** on the same level of an hierarchy.



Ghost Folder

Ghost Folders are equivalent to empty (or dummy) **View Folders**. They are created solely for the purpose of classifying documents. When you **View By** a document property within a **View Folder**, documents are grouped into **View Folders** for the selected **property** if they also have like values for the selected **property** of the higher level **View Folder**. Ghost Folders will be displayed for all values for the **View By property** that exist in FileSphere but where there are no documents to match current **View Folder** hierarchy.

[top](#) When a document is placed in a **Ghost Folder** it inherits the FileSphere **properties** (tags) used to create the **Ghost Folder**. Once a **Ghost Folder** contains a document it becomes a **View Folder**.



Static Folder

[top](#) **Static Folders** are traditional **Windows** folders that can coexist with FileSphere's dynamic **View folders**. They provide the **Migrate** function designed to assist in the transition of your documents to FileSphere.



Static Folders are displayed in the **Document Space** only when no **property** has been selected from the **View By** menu.

Static folders also provide access to **FileSphere property settings** (tags) so that you can classify all documents held in a folder at once.

Documents can be classified and included in FileSphere **View Folders** while they remain associated with a **Static Folder**.



Search

[top](#) If you are unable to locate files using the **Retrieval Bar**, or **View By** to create **View Folders**, or if you just prefer to search for documents, FileSphere provides you with a **Quick Search Toolbar** and an **Advanced Search**.

You can search for **FileSphere** documents and files in any **Document Space** to which you have access, using almost any search criteria. You can also search based on document content or the document's FileSphere **properties**. You can even search for documents that are not classified, i.e. they do not have a **value** for a specified **property**.



Shredder

[top](#)

The Shredder is FileSphere's recycle bin. When you delete a file it is sent to the **Shredder**. Files stay in the **Shredder**, which is similar to the **Windows Recycle Bin** until they are permanently deleted or restored. If you are presented with a large number of documents in the **Shredder**, you can use the [Retrieval Bar](#) or the [View By](#) function to help you locate documents.



Once you empty the **Shredder**, files are permanently deleted.

Documents



Document icons represent links to FileSphere documents in their central storage location. Conventional document icons are used, which are dependent on their associated application (or Type).



[top](#)

FileSphere annotates these icons and colour codes associated text to indicate: when multiple versions are available; document status - **checked in** or **out**; if the document has been **Finalized** (published); or if the document is *pending classification*. (see [FileSphere documents](#)).





FileSphere space



FileSphere

The **FileSphere** icon, or main FileSphere space, provides a logical boundary between FileSphere managed files and the files usually viewed in **Windows Explorer** and supported **Microsoft Office** application **Open** and **Save** dialog boxes

FileSphere functions are accessed via the **FileSphere** icon [menu](#) and [contents menu](#) options or **Windows Explorer** **FileSphere toolbar** buttons. **FileSphere** property settings are accessed via the **FileSphere** [Properties](#) dialog box.



How to access

[FileSphere icon menu](#)

[FileSphere icon contents menu](#)

[FileSphere icon properties](#)



How to

[Register/ renew FileSphere license key](#)

[Edit FileSphere options settings](#)

[Edit FileSphere file types settings](#)



See also

[Overview of FileSphere documents, spaces and folders](#)



FileSphere icon menu



FileSphere icon

▶ Right click on the **FileSphere** icon and you can select from the following options:

Expand/ Collapse	Display/ Hide FileSphere spaces
Explore	Opens a new Windows Explorer window for FileSphere with folders and contents panes
Open	Opens a new Windows Explorer window for FileSphere , contents pane only
Administration	Opens the FileSphere Administration console window. Refer to the FileSphere Administrator Help for further information (Windows Start menu > Programs > FileSphere Personal > Administrator Help)
Restart	Restarts FileSphere. You should restart FileSphere after making configuration changes.
Properties	Displays the FileSphere icon's Properties dialog box, for access to: General - displays version details, license details and provides access to register/ renew FileSphere license key Options - main layout settings and advanced settings File Types - for specifying special file types for security purposes and/ or for manual version control



See also

[FileSphere icon contents menu](#)

[FileSphere icon properties](#)

[FileSphere icon](#)

[Registering/ renewing FileSphere license key](#)



FileSphere icon contents menu



FileSphere icon

► Select the **FileSphere** icon and right click in the right contents pane. You can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as name, type size, modified (date) and status (FileSphere status)
Refresh	Updates contents pane display with current information
Properties	Displays the FileSphere Properties dialog box, from where you can view/ edit the following property settings: General - displays version details, license details and provides access to register/ renew FileSphere license key Options - main layout settings and advanced settings File Types - for specifying special file types for security purposes and/ or for manual version control



See also

[FileSphere icon properties](#)

[FileSphere icon menu](#)

[FileSphere icon](#)



FileSphere icon properties



FileSphere icon

- Right click on the **FileSphere** icon and select **Properties** from the menu.

The **Properties** dialog box allows you to view/ edit the following property settings by clicking on the appropriate tab:

General	Displays FileSphere version and license details. Also indicates if you are running an evaluation version of FileSphere. Click the Registration button to enter or update the license key details and extend your license period.
Options	All FileSphere spaces are displayed by default when FileSphere is installed. The Options tab, Main layout settings , allows you remove FileSphere spaces from display if they are not required. The advanced settings allow you to set hint item display and stop/allow automatic creation of View Folders . You can also choose whether you want to be prompted when certain events take place.
File Types	Allows you to specify special file types, which for security reasons, you do not want FileSphere to run (.exe files for example). You can also specify file types for FileSphere to display a warning prompt before opening them. For files where you do not need version control because you never need to edit them, such as MP3 files, you can specify manual version management. When you open (or play) the file, a copy will be displayed in My Workspace but the file will not be checked out. When the file is closed, it will be automatically returned to the Document Space .



How to

- [View FileSphere general properties](#)
- [Renew the FileSphere license key](#)
- [Edit FileSphere options settings](#)
- [Edit FileSphere file types settings](#)



See also

- [FileSphere icon menu](#)
- [FileSphere icon contents menu](#)
- [FileSphere icon](#)

Viewing FileSphere general properties



FileSphere icon

- Right click on the **FileSphere** icon, select **Properties** from the menu and then the **General** tab, if it is not already selected.

The following information is displayed:

	FileSphere Personal (version number) Copyright notice.
Product license details	<ul style="list-style-type: none">◆ Name◆ Company Name◆ Product ID◆ License expiry date and number of days until license expires
Registration button	For registering/ renewing your FileSphere license



See also

[Registering/ renewing FileSphere license key](#)
[FileSphere options settings](#)
[FileSphere file types settings](#)
[FileSphere properties](#)

Renewing the FileSphere license key



FileSphere icon

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **General** tab, if it is not already selected.
- ▶ Click the **Registration** button.
- ▶ Enter your product key in the boxes provided and click the **Register** button.
- ▶ Click OK to close the **Properties** dialog box.



See also

[FileSphere options settings](#)
[FileSphere file types settings](#)
[Viewing general properties](#)
[FileSphere properties](#)

FileSphere options settings



FileSphere icon

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **Options** tab.

Main layout settings

This section displays a list of available FileSphere spaces. A tick in the checkbox against a space indicates its icon is displayed. An empty checkbox indicates the icon is hidden.

To display / hide a FileSphere space

- ▶ Click on the checkbox adjacent to the appropriate space name.
- ▶ Click **OK** to close the **Properties** dialog box.

Advanced settings

This section allows you to set the following options by selecting or deselecting the appropriate checkbox.

Display ghost folders	<input type="checkbox"/> Default Unchecked: Ghost Folders are not displayed by default. When a New Folder is added it is displayed as a Ghost Folder, however, other Ghost Folders remain hidden. Regardless of this setting, Ghost Folder display can be toggled on and off , in individual folders, using the Ghost Folder button.
Display unclassified documents	<input checked="" type="checkbox"/> Default Checked: Unclassified documents are always displayed. Unchecked: documents that are not classified for the current view are not displayed. For example if you View By Subject , Subject View Folders only will be displayed and documents with no Subject will be hidden. Regardless of this setting, the display of unclassified documents can be toggled on and off in individual Folders using the Unclassified Documents button. <input checked="" type="checkbox"/> If you are looking in the Document Space and you cannot see any documents, you may have no View By property selected and unclassified documents hidden. Click the



	Unclassified Documents button to reveal your documents.
Display the full path in the Retrieval Bar	<input checked="" type="checkbox"/> Default Checked: Displays the full path of properties and values entered in the Retrieval Bar . E.g. Author=Jo Citizen/Subject=Sales/Title=Sales Forecast/ Unchecked: Once the retrieval path has been actioned, the bar displays only properties entered. E.g. Author/Subject/Title/
Display Network Peers under FileSphere root (Professional / Enterprise only)	<input checked="" type="checkbox"/> Default Checked: Displays Network Peers to which you have linked under the FileSphere space. Unchecked: Displays Network Peer icons under a Remote Spaces icon.
Display hints for items	<input checked="" type="checkbox"/> Default Checked: Displays hints for space, folder and document items when your mouse hovers over them. Hints displayed are specific to each Document Space and are defined using the Hints tab in the Document Space Properties dialog box. Unchecked: no hints are displayed.
Classify newly added documents according to my Access Level (Professional / Enterprise only)	<input type="checkbox"/> Default Unchecked: Newly added documents are unclassified for Access Level. Checked: Newly added documents are classified according to the user's Access Level, eg. A user with an Access Level of 'Confidential' will create documents that can only be accessed by other users with an Access Level of 'Confidential' or higher.
Stop automatic view by when 20 documents reached	<input checked="" type="checkbox"/> Default Checked: When you use View By to create View Folders , FileSphere will not automatically generate further View Folders once a Folder contains 20 documents or less. Unchecked: FileSphere automatically generates further View Folders , using the sequence in which properties are displayed on the View By menu, until it reaches a property for which no documents have a value .
Prompt to return open documents	<input checked="" type="checkbox"/> Default Checked: When you close a document that you have opened from My Workspace , FileSphere will prompt you to return the document to its Document Space or keep it in My Workspace (i.e. Checked Out). Unchecked: No prompt is displayed and documents are automatically returned.
Prompt to enter comment when finalizing documents	<input checked="" type="checkbox"/> Default Checked: When you Finalize a document, FileSphere displays the Finalize dialog box, in which you can optionally set an expiry date for the document, delete all minor versions and add a version comment . Unchecked: No prompt is displayed when the document is Finalized
Prompt when sending via network peer or email (Professional / Enterprise only)	<input checked="" type="checkbox"/> Default Checked: When you Send a document to a Network Peer , FileSphere, displays the Sending to Network Peer dialog box, in which you can optionally make the document read only and add a comment for the recipient. Unchecked: No prompt is displayed when a document is sent to a Network Peer
Prompt to package when sending documents (Professional / Enterprise only)	<input checked="" type="checkbox"/> Default Checked: When you Send a document by Email or MSN Messenger, FileSphere, displays the Sending to Network Peer dialog box, in which you can optionally make the document read only and add a comment for the recipient. Unchecked: No prompt is displayed when a document is sent to a Network Peer
Prompt to checkout when sending documents (Professional / Enterprise only)	<input checked="" type="checkbox"/> Default Checked: When you Send a document to a Network Peer , FileSphere asks if you want to Check Out the document or to send a copy. Unchecked: No prompt is displayed when a document is sent to a Network Peer and the document is automatically Checked Out .
Prompt when identified emails are added (Professional / Enterprise only)	<input checked="" type="checkbox"/> Default Checked: When you received a packaged FileSphere file by email, you are prompted to add the document to your In Tray. Unchecked: No prompt is displayed and received documents are automatically added to your In Tray.
Prompt auto classify	<input checked="" type="checkbox"/> Default Checked: When you add a document to FileSphere it is automatically classified (i.e. the document's native metadata is transferred to FileSphere) and no prompt is displayed. Unchecked: When you add a document to FileSphere you are prompted to accept or decline the automatic classification.

**See also**

- [FileSphere file types settings](#)
- [Viewing general properties](#)
- [Renewing the FileSphere license key](#)
- [FileSphere properties](#)

FileSphere file types settings

**FileSphere icon**

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **File Types** tab.
- ▶ In the **Special file types** section, file types that may be unsafe; require no version control; or are to be treated as templates are listed.
- ▶ The **Details for extension** section shows details for the extension highlighted in the **Special file types** list:

Manual version management	If the check box is ticked for a particular extension, this means that FileSphere will open a read only version of the file, which does not require version control. An MP3 file is an example of this type of file: when you open (or play) the file, a copy will be displayed in My Workspace but the file will not be checked out. When the file is closed, it will be automatically returned to its document space .
Open / Run	Allows you to Enable , Disable or Prompt to open/ run files with a particular extension
Template	Allows you to save files with a particular extension as templates, which means on opening, an editable copy of the file is opened which has to be saved as a new document, preserving the original document.

To add a new file extension to the special file types list

- ▶ Click the **New** button
- ▶ The **New Extension** dialog box is displayed
- ▶ Type the extension in the **Extension** box, without typing a preceding dot (.), and click OK.
- ▶ The new extension is added to the list. Its file type defaults from the system. If the file type is not recognised the file type will be displayed as "<extension> file type."
- ▶ Highlight the new file type in the list of **Special file types**
 - ▶ Check the **Manual version management** checkbox if you do not require version control for this type of file.
 - ▶ Select **Enable**, **Disable** or **Prompt** from the **Open / Run** drop down list to determine how the file is handled when opened
 - ▶ Check the **Template** checkbox if you wish to define this file type as a template.
- ▶ Click the **OK** button to close the **Properties** dialog box.

**See also**

- [Viewing general properties](#)
- [Renewing the FileSphere license key](#)
- [FileSphere options settings](#)
- [FileSphere properties](#)



Document Space



Document Space

The **Document Space** acts as a central repository and it displays and tracks all active documents that are stored by FileSphere.



Remember FileSphere can only track documents if they have been added to FileSphere.

You can manage, classify, retrieve, send and open documents from a **Document Space** and view document status and version details.

In addition to document icons, you may also see icons for **View Folders**, **Ghost Folders** or **Static Folders**.

To locate and identify documents in a **Document Space** you can use the **Retrieval Bar** or you can group documents into **View Folders** using the **View By** function.

A **Document Space** has the following information available for each document. If you are unable to see any of these columns, right click on a column heading and select the column you wish to view:

Name	Name of the document
Type	Indicates the file type and associated application, eg. Microsoft Word Document
Size	Document size in KBs
Created	Date the document was created
Modified	Date the document was last modified
Accessed	Date the document was last accessed
Status	Indicates if the document is Checked In , Checked Out or Finalized (published)
Last Version	The latest version number
Last Edited By	Domain name / User name of the user that last edited the document

Document space functions are accessed via the **Document Space** icon [menu](#) and [contents menu](#) options or **_Windows Explorer FileSphere toolbar** buttons. **Document space** properties are accessed via the **Document Space Properties** dialog box.



How to access

[Document Space menu](#)

[Document Space contents menu](#)

[Document Space properties](#)



See also

[About sending and sharing documents](#)



Document Space menu



Document Space

► Right click on the **Document Space** and you can select from the following options:

Expand/ Collapse	Display/ Hide sub View/ Ghost Folders (or Static Folders if no View By is selected)
View By ►	<p>Displays a menu listing properties.</p> <p>Select a property and FileSphere will group documents in the Document Space with like values (classification) into View Folders for the selected property. Ghost Folders may be displayed for property values that have been created in FileSphere but for which there are no documents in the current view. The display of Ghost Folders is set to off by default but you can turn their display on and off by clicking the Ghost Folders button on the FileSphere toolbar.</p> <p>Documents with no value for the selected View By property (unclassified for the current view) will remain displayed in the Document Space. You can turn the display of these documents on and off by clicking the Unclassified Documents button on the FileSphere toolbar.</p>
Explore	Opens a new Windows Explorer window for the Document Space with folders and contents panes
Open	Opens a new Windows Explorer window for the Document Space , contents pane only
Search	Opens the Quick Search bar on top of the contents pane. Search results are displayed in the pane below - this is equivalent to clicking the Search icon. The Quick Search bar has a link to Advanced Search.
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to the Document Space . Documents added, will be auto classified as their native file properties are transferred to FileSphere with the document
Refresh	Refreshes the Document Space contents pane
Properties	<p>Displays the Document Space Properties dialog box, from where you can view/ edit the following property settings:</p> <p>General - Displays information about the Document Space, such as name of the computer on which it is located and the number and total size of files it holds.</p> <p>Document Types - Allows you to specify which document extensions, associated document types and drivers are registered with FileSphere for the selected Document Space</p> <p>File Storage - Allows you to change the storage location of documents held in the selected Document Space.</p> <p>Hints - Allows you to specify which hints are displayed on mouseover of documents in the selected Document Space</p>



See also

[Document Space contents menu](#)

[Document Space properties](#)

[Document Space](#)



Document Space contents menu



Local Document Space

- Select the **local Document Space**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as name, type size, modified (date) and status (FileSphere status)
Refresh	Updates contents pane display with current information
Paste	Standard Windows paste function
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to the Document Space . Documents added, will be auto classified as their native file properties are transferred to FileSphere with the document
Acquire Images	Displays a menu showing available TWAIN-compliant devices, such as scanners and digital cameras. Select a device to acquire the image. The processed image will be saved in FileSphere.
New	Displays a drop down menu to allow you to: <ul style="list-style-type: none">♦ Create a new View Folder if you have a View By selected or create a new Static Folder if no View By is selected♦ Create a new Document by selecting from the list of supported document types. The new document will be classified according to the View Folder or View Folder hierarchy that you are creating it in.
Properties	Displays the Document Space Properties dialog box, from where you can view/ edit the following property settings: <ul style="list-style-type: none">♦ General♦ Document Types♦ File Storage♦ Hints



See also

[Document Space properties](#)
[Document Space menu](#)
[Document Space](#)



Document Space properties



Local Document Space

- ▶ Right click on the **Document Space** icon and select **Properties** from the menu.

The **Properties** dialog box allows you to view or edit* the following property settings by clicking on the appropriate **tab** :

General	Displays information about the Document Space , such as name of the computer on which it is located and the number and total size of files it holds.
Document Types	Allows you to specify which document extensions, associated document types and drivers are registered with FileSphere for the selected Document Space
File Storage	Allows you to change the storage location of documents held in the selected Document Space .
Hints	Allows you to specify which hints are displayed on mouseover of documents in the selected Document Space



How to

[View Document Space general properties](#)

[Edit Document Space document types settings](#)

[Edit Document Space hints settings](#)



See also

[Document Space menu](#)

[Document Space contents menu](#)

[Document Space](#)

Document Space general properties



Document Space

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **General** tab.

The following information is displayed:

	Displays Document Space for the main Document Space . For additional Document Spaces , displays the name entered when the Document Space was created.
Description	Displays a user defined short description
Location	Displays the system name for the computer you are working on followed by the Document Space name for additional Document Spaces
Contains	Displays the number of files contained in the Document Space
Total Size	Displays the total size of the files contained in the Document Space



See also

[Editing Document Space document types settings](#)

[Editing Document Space hints settings](#)

[Viewing Document Space general properties](#)

[Document Space properties](#)



Document Space document types settings



Document Space

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **Document Types** tab.
The **Document Types** tab displays the extensions of the document types that are registered with **FileSphere**. Selecting an extension displays details of its associated driver.

To register a new document type

- ▶ Click the **Add** button.
The **Add New Document Type Association** dialog box is displayed.
 - ▶ Enter a **File Extension** and select an **Associated Document Type** from the drop down list **or** you can type in a new one.
- ▶ Click **OK** to close the dialog box.
The new document type will be added to the list. If you selected an existing **Associated Document Type**, its default driver will be associated with the document type.

To change the driver associated with a document type

- ▶ Select the extension and click the **Change...** button.
The **Open** dialog box is displayed.
- ▶ Browse to select the appropriate driver, then click **Open**
- ▶ Click **OK** to close the dialog box.

To remove a document type

- ▶ Select the extension of the document type you wish to remove and click the **Remove** button.
- ▶ Click **OK** to close the dialog box.



See also

[Editing Document Space hints settings](#)
[Viewing Document Space general properties](#)
[Document Space properties](#)

Document Space hints settings



Document Space

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **Hints** tab.
The **Hints** tab displays the file and document management system attributes and business and application schemas from which you can select properties to display as hints when you mouseover a document.
File name, document status and number of versions are displayed by default as hint items.



Administrative access rights are required to change hints settings

To change hint items

- ▶ To locate hint items for selection, expand the top level list of items by clicking the adjacent **+**.
- ▶ Select items to display as hints, or remove from display, by selecting/ deselecting the appropriate checkbox.
- ▶ Click **OK** to close the dialog box.



See also

[Viewing Document Space general properties](#)
[Editing Document Space document types settings](#)



[Document Space properties](#)




My Workspace



My Workspace

My Workspace, which is the first space displayed beneath the **FileSphere** icon is your personal workspace, similar to your desk area.

My Workspace holds copies of documents that you are working on. It also has a  **Favorites** space in which you can keep links to documents that you refer to or access frequently or that you are working on at present.

When you open a document, the document is **Checked Out** and a link to it is placed in **My Workspace**. You can also **Check Out** documents manually, without opening them, by sending them from their **Document Space** to **My Workspace**.

When you close a document it is automatically returned to its **Document Space**, unless you opened it from **My Workspace**, in which case FileSphere will prompt you before returning it so that you can choose to keep the document in **My Workspace**.

You can **Check In** documents manually by returning them from **My Workspace** to their **Document Space**.

Documents that are **Checked Out** are locked for editing by other users, but other FileSphere users, that have access to them, can open a copy in **read only** mode for reviewing purposes.



When you edit and save a document held in **My Workspace**, the document's version is not updated, until the document is returned to its **Document Space**.



The **History** button on the **Windows Explorer FileSphere toolbar** toggles the **My Workspace History** pane on and off. **History** displays the following details for documents you have opened or checked out previously:

- ◆ Name
- ◆ Type
- ◆ Size
- ◆ Version
- ◆ Network Peer (name of the computer on which the document is stored)
- ◆ Time
- ◆ Comment (comment added by the sender or a default system message)
- ◆ From (name of the sender)

You can double click on any document in the History pane to open it. The most recent version of the document will be opened, unless the document is no longer accessible because it has been moved or deleted, in which case a message dialog box will be displayed.

My Workspace functions are accessed via the **My Workspace** icon [menu](#) and [contents menu](#) options or **FileSphere toolbar** buttons. **My Workspace** property settings are accessed via the **My Workspace Properties** dialog box.



How to access

[My Workspace menu](#)

[My Workspace contents menu](#)

[My Workspace properties](#)

[My Workspace document menu](#)



See also

[Favorites](#)

[Document Space](#)

[About sending and sharing documents](#)



My Workspace menu



My Workspace

► Right click on a **Workspace** and you can select from the following options:

Expand/ Collapse	Display/ Hide sub spaces: Favorites , In Tray and Out Tray
Explore	Opens a new Windows Explorer window for My Workspace with folders and contents panes
Open	Opens a new Windows Explorer window for My Workspace , contents pane only
Refresh	Refreshes the My Workspace contents pane
Properties	Displays My Workspace Properties dialog box, from where you can view general properties



See also

- [My Workspace contents menu](#)
- [My Workspace properties](#)
- [My Workspace document menu](#)
- [My Workspace](#)



My Workspace contents menu



My Workspace

► Select **My Workspace**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as Name, Type, Size, Version, Network Peer and Time
Refresh	Updates contents pane display with current information
Paste	Standard Windows paste function
Properties	Displays My Workspace Properties dialog box, from where you can view general properties



See also

[My Workspace properties](#)

[My Workspace menu](#)

[My Workspace document menu](#)

[My Workspace](#)



My Workspace properties



My Workspace

► Right click on a **My Workspace** and select **Properties** from the menu to display the following information:

	Displays My Workspace
Type	Displays FileSphere Workspace
Location	Displays the system name for the computer you are working on
Contains	Displays the number of files contained in My Workspace
Total Size	Displays the the total size of the files contained in My Workspace



See also

[My Workspace document menu](#)

[My Workspace menu](#)

[My Workspace contents menu](#)

[My Workspace](#)



Favorites

Favorites



Favorites

Favorites is a space where you can keep shortcuts to documents for quick access. You can keep shortcuts to documents that you access regularly or documents you are currently working with or documents you use infrequently but want to be able to access them quickly.

To add a document to Favorites

- ▶ In the **Document Space**, right click on the document and select **Send To** from the menu and then **Favorites**.

To remove a document from Favorites

- ▶ In the **Favorites** space, right click on the document and select **Remove from Favorites**

The **Favorites** space has an icon [menu](#), a [contents menu](#) and a [Properties](#) dialog box. Documents in the **Favorites** space are managed using the individual [documents' menu](#).



How to access

[Favorites menu](#)

[Favorites contents menu](#)

[Favorites properties](#)

[Favorites document menu](#)



Favorites menu



Favorites

► Right click on the **Favorites** space and you can select from the following options:

Expand	Has no function in Favorites
Explore	Opens a new Windows Explorer window for the Favorites space with folders pane and contents panes
Open	Opens a new Windows Explorer window for the Favorites space, contents pane only
Refresh	Refreshes the Favorites contents pane
Properties	Displays the Favorites Properties dialog box, which contains information on the number of files held in Favorites .



See also

[Favorites contents menu](#)
[Favorites properties](#)
[Favorites document menu](#)
[Favorites](#)



Favorites contents menu



Favorites

► Select the **Favorites**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as Name, Type, Size, Version, Network Peer and Time
Refresh	Updates contents pane display with current information
Properties	Displays the Favorites Properties dialog box, which contains information on the number of files held in Favorites .



See also

[Favorites properties](#)
[Favorites document menu](#)
[Favorites menu](#)
[Favorites](#)



Favorites properties



Favorites

- Right click on the **Favorites**, select **Properties** from the menu to display the following information:

	Favorites
Type	Displays FileSphere Favorites
Contains	Displays the number of files contained in Favorites



See also

[Favorites document menu](#)
[Favorites menu](#)
[Favorites contents menu](#)
[Favorites](#)



Search



Search

If you are unable to locate files using the [Retrieval Bar](#) or [View By](#) to create [View Folders](#); or if you just prefer to search for documents, FileSphere provides you with a [Quick Search Toolbar](#) and an [Advanced Search](#).

You can search for **FileSphere** documents and files in **local**, **central** and **network Document Spaces** using almost any search criteria. You can also search based on document content or the document's FileSphere [properties](#). You can even search for documents that are not classified, i.e. they do not have a [value](#) for a specified [property](#).

The FileSphere **Search** function is easily accessible using the **Search** icon, the **Search** button on the **FileSphere** toolbar or alternatively, a **Search** option is available on **Document Space**, **Templates** or **Shredder** right click menus.

FileSphere displays search results, showing document details and status, exactly as they are displayed in the **Document Space**. You can open and work on any documents listed in the search results.



Remember **FileSphere** can only search for documents if they have been added to **FileSphere**.



How to access

[Search menus](#)



How to

[Use Search](#)



Search menus



Search

To view the Search icon menu

- ▶ Right click on the **Search** icon.

This menu displays regular Windows Explorer menu options.

To view the Search icon contents menu

- ▶ Select the **Search** in Windows Explorer and right click in the contents pane
The contents menu displays regular Windows Explorer contents pane options.



See also

[Search](#)



Shredder



Shredder

Shredder is FileSphere's equivalent of a recycle bin, which stores **FileSphere** documents as you delete them.

If you delete documents by mistake, you can retrieve them from **Shredder** and restore them to their original location.

If you are presented with a large number of documents in the **Shredder**, you can use the **Retrieval Bar** or the **View By** function to help you locate documents.



When you delete a document from the **Shredder** it is permanently deleted and cannot be retrieved.



How to access

[Shredder menu](#)

[Shredder contents menu](#)

[Shredder properties](#)



How to

[Delete documents from the Shredder](#)

[Restore documents from the Shredder](#)




Shredder menu



Shredder

► Right click on the **Shredder** icon and you can select from the following options:

Expand/ Collapse	Display/ Hide sub View/ Ghost Folders (or Static Folders if no View By is selected)
View By ►	<p>Displays a menu listing properties.</p> <p>Select a property and FileSphere will group documents in the Shredder with common classification into View Folders for the selected property. Ghost Folders will be created property values that have been created in FileSphere but for which there are no documents. The display of Ghost Folders is set to off by default but you can their display on and off by clicking the Ghost Folders button on the FileSphere toolbar.</p> <p>Documents with no value for the selected View By property will remain in the Document Space. You can turn the display of these documents on and off by clicking the Unclassified Documents button on the FileSphere toolbar.</p>
Explore	Opens a new Windows Explorer window for the Shredder with folders and contents panes
Open	Opens a new Windows Explorer window for the Shredder , contents pane only
Search	Opens the Quick Search bar on top of the contents pane. Search results are displayed in the pane below - this is equivalent to clicking the Search icon. The Quick Search bar has a link to Advanced Search.
Empty Shredder	<p>Deletes all documents contained in Shredder. A dialog box is displayed asking you to confirm the deletion.</p> <p> Documents deleted from the Shredder are permanently deleted and cannot be retrieved.</p>
Restore	Restores all deleted documents from the Shredder to the Document Space with the same classification as prior to deletion.
Refresh	Refreshes the Shredder contents pane
Properties	Displays the Shredder Properties dialog box, from where you can view general property settings.



See also

[Shredder contents menu](#)
[Shredder properties](#)
[Shredder](#)




Shredder contents menu



Shredder

► Select the **Shredder**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as Name, Type, Size, Time, Comment and From
Refresh	Updates contents pane display with current information
Empty Shredder	<p>Deletes all documents contained in Shredder. A dialog box is displayed asking you to confirm the deletion.</p> <p> Documents deleted from the Shredder are permanently deleted and cannot be retrieved.</p>
Restore	Restores all deleted documents from the Shredder to their original Document Space and with the same classification as prior to deletion.
Properties	Displays the Shredder Properties dialog box, from where you can view general properties.



See also

[Shredder properties](#)

[Shredder menu](#)

[Shredder](#)



Shredder properties



Shredder

► Right click on **Shredder**, select **Properties** from the menu to display the following information:

Name	Displays Shredder
Type	Displays FileSphere Shredder
Location	Displays the system name for the computer you are working on
Contains	Displays the number of files contained in Shredder
Total Size	Displays the the total size of the files contained Shredder



See also

[Shredder menu](#)

[Shredder contents menu](#)

[Shredder](#)



View Folder



View Folder

View Folders are dynamic virtual spaces or folders used for classifying, grouping and retrieving documents in FileSphere. The **View By** function allows you to arrange documents with common classification (the same **properties** and **values**) into **View Folders**.



When you see **View Folders** displayed, to help you see which property created them, if you look at the **Type** column, you'll see that the folder's property name is shown next to the folder type (for example, if the **Type** column displays **Department -- View Folder** this means you have selected to **View By Department**).

The **View By** function can be used within **View Folders** to create a hierarchy of **View Folders**; this effectively filters the documents until you can retrieve the document you want to work with. You can also **View By** a different property in each **View Folder**, when you are looking in **View Folders** at the same level in a hierarchy, to aid your location of documents.

You can classify documents by adding them to a **View Folder** because they will automatically inherit the classification (**property value**) of the **View Folder**. If you add documents to a **View Folder** at the bottom of a **View Folder** hierarchy, they will inherit the classification (**property values**) of every **View Folder** in the branch of the hierarchy in which you have placed them.

Once you select a **View By property** to create **View Folders**, FileSphere automatically creates **View Folders** by viewing by other properties on the **View By** menu. To help you navigate through these folders, FileSphere has a default option to stop automatic **View Folder** creation once you reach a **View Folder** that contains 20 documents or less.



The option to stop automatic **View Folder** creation is accessed in the FileSphere icon **Properties** dialog box under the **Options** tab.

Select or deselect the **Stop automatic view by when 20 documents reached** checkbox to turn this option on or off.

View Folder functionality is accessed via the **View Folder** icon **menu** and **contents menu** options or **FileSphere toolbar** buttons. **View Folder** properties are accessed via the **View Folder Properties** dialog box.



How to access

[View Folder menu](#)

[View Folder contents menu](#)

[View Folder properties](#)



How to

[Classify documents using View & Ghost Folders](#)




View Folder menu



View Folder

▶ Right click on a **View Folder** and you can select from the following options:

Expand/ Collapse	Display/ Hide sub View Folders
View By ▶	Displays a menu listing properties . Select a property and FileSphere will group the documents with common classification in the current View Folder into sub View Folders for the selected property
Explore	Opens a new Windows Explorer window for the View Folder with folders and contents panes
Open	Opens a new Windows Explorer window for the View Folder , contents pane only
Search	Opens the Quick Search bar on top of the contents pane. Search results are displayed in the pane below - this is equivalent to clicking the Search icon. The Quick Search bar has a link to Advanced Search.
Cut	Cuts the contents of the View Folder and copies them to the clipboard
Copy	Copies the contents of the View Folder to the clipboard
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to this particular View Folder or View Folder hierarchy. Documents added to this View Folder will inherit the property value of the View Folder and any higher View Folders in the hierarchy
Shred	Sends the View Folder contents to the Shredder
Remove Classification	Classification (property value) is removed from all documents held in this folder, or lower folders, for this View Folder's property only.
Rename	Allows you to rename the View Folder .  Renaming the folder, changes the classification for all documents grouped by this folder.
Refresh	Refreshes the View Folder contents pane
Properties	Displays the View Folder's Properties dialog box, which displays type, size, location and the property and value for this folder and other folders, if this folder is part of a hierarchy, i.e. the View By selections made to reach this folder.



See also

[View Folder contents menu](#)

[View Folder properties](#)

[View Folder](#)



View Folder contents menu



View Folder

► Select a **View Folder**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as name, type size, modified (date) and status (FileSphere status)
Refresh	Updates contents pane display with current information
Paste	Standard Windows paste function
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to this particular View Folder or View Folder hierarchy. Documents added to this View Folder will inherit the property value of the View Folder and any View Folders higher in the hierarchy
Acquire Images	Displays a menu showing available TWAIN-compliant devices, such as scanners and digital cameras. Select a device to acquire the image. The processed image will be saved in FileSphere and this View Folder (or View Folder hierarchy).
New	Displays a drop down menu to allow you to: <ul style="list-style-type: none">◆ Create a new View Folder if you have a View By selected within this View Folder◆ Create a new Document by selecting from the list of supported document types. The new document will be classified according to the View Folder or View Folder hierarchy that you are creating it in.
Properties	Displays the View Folder's Properties dialog box, which displays type, size, location and the property and value for this folder and other folders, if this folder is part of a hierarchy, i.e. the View By selections made to reach this folder.



See also

[View Folder properties](#)

[View Folder menu](#)

[View Folders](#)



View Folder properties



View Folder

▶ Right click on a **View Folder**, select **Properties** from the menu to display the following information:

Name	Displays the name of the View Folder , which is its property value . You can change the name, which will reclassify all the documents grouped by this folder with the new value .
Type	Displays FileSphere View Folder
Location	Displays the system name for the computer that this View Folder's Document Space is on
Contains	Displays the number of files contained in this folder
Total Size	Displays the the total size of the files contained in this folder
View Folder Selection	Displays the property and value for this folder. If the folder is part of a hierarchy of folders the properties and values of higher folders are displayed, i.e. the View By selections made to reach this folder



See also

[View Folder menu](#)

[View Folder contents menu](#)

[View Folders](#)



Ghost Folder



Ghost Folder

Ghost Folders are dynamic virtual spaces or folders used for classifying documents in FileSphere. You can look on them as being *empty View Folders*, but they are only empty in the particular view of the space you are currently looking in. A folder displayed as a **Ghost Folder** when one **View By** is selected may be displayed as a **View Folder** when an alternative **View By** is selected.

By default **Ghost Folder's** are not displayed in FileSphere. The **Ghost Folder** button on the **FileSphere toolbar** toggles **Ghost Folder** on and off.

When documents are placed in a **Ghost Folder**, they automatically inherit the classification (**property** and **value**) of the **Ghost Folder**. Once a **Ghost Folder** contains documents it is no longer a **Ghost** and is converted to a **View Folder**.



When you see **Ghost Folders** displayed, to help you see which property created them, if you look at the **Type** column, you'll see that the folder's property name is shown next to the folder type (for example, if the **Type** column displays **Department -- Ghost Folder** this means you have selected to **View By Department**).

You can also **View By** a different property in each **Ghost Folder**, when you are looking in **View/ Ghost Folders** at the same level in a hierarchy.

The **View By** function can be used within **Ghost Folders** to create a hierarchy of **Ghost Folders**. You can add documents to this hierarchy to classify them because they will automatically inherit the classification (**property values**) of every **View/ Ghost Folder** in the branch of the hierarchy in which you have placed them.



Renaming **Ghost Folders** should be carried out with care because changing the **value** for this **Ghost Folder property** will also changing the **value** for all documents in the **Document Space** that have this **property value**.

Ghost Folder functionality is accessed via the **Ghost Folder** icon **menu** and **contents menu** options or **FileSphere toolbar** buttons. **Ghost Folder** properties are accessed via the **Ghost Folder Properties** dialog box.



How to access

[Ghost Folder menu](#)

[Ghost Folder contents menu](#)

[Ghost Folder properties](#)



How to

[Create a new Folder](#)



Ghost Folder menu



Ghost Folder

► Right click on a **Ghost Folder** and you can select from the following options:

Expand/ Collapse	Display/ Hide Ghost Folders
View By ►	Displays a menu listing properties . Select a property and FileSphere will create Ghost Folders for the selected property
Explore	Opens a new Windows Explorer window for the Ghost Folder with folders and contents panes
Open	Opens a new Windows Explorer window for the Ghost Folder , contents pane only
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to to this particular Ghost Folder or View/ Ghost Folder hierarchy. Documents added to this Ghost Folder will inherit the property value of the Ghost Folder and any higher View/ Ghost Folders in the hierarchy
Remove Classification	Classification (property value) is removed from all documents held in FileSphere that have this Ghost Folder's property value .
Rename	Allows you to rename the Ghost Folder
Refresh	Refreshes the View Folder contents pane
Properties	Displays the Ghost Folder's Properties dialog box, where you can view general properties.



See also

[Ghost Folder contents menu](#)

[Ghost Folder properties](#)

[Ghost Folders](#)



Ghost Folder contents menu



Ghost Folder

► Select a **Ghost Folder**, right click in the right contents pane and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as name, type size, modified (date) and status (FileSphere status)
Refresh	Updates contents pane display with current information
Paste	Standard Windows paste function
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to to this particular Ghost Folder or View/ Ghost Folder hierarchy. Documents added to this Ghost Folder will inherit the property value of the View Folder and any View/ Ghost Folders higher in the hierarchy
Acquire Images	Displays a menu showing available TWAIN-compliant devices, such as scanners and digital cameras. Select a device to acquire the image. The processed image will be saved in FileSphere and this Ghost Folder (or View/ Ghost Folder hierarchy).
New	Displays a drop down menu to allow you to: <ul style="list-style-type: none">◆ Create a new Ghost Folder if you have a View By selected within this Ghost Folder◆ Create a new Document by selecting from the list of supported document types. The new document will be classified according to the Ghost Folder or View/ Ghost Folder hierarchy that you are creating it in.
Properties	Displays the Ghost Folder's Properties dialog box, where you can view general properties.



See also

[Ghost Folder properties](#)

[Ghost Folder menu](#)

[Ghost Folders](#)




Ghost Folder properties



Ghost Folder

▶ Right click on a **Ghost Folder** and select **Properties** from the menu to display the following information:

Name	Displays the name of the Ghost Folder , which is its property value . You can change the name of this folder to provide a new value for this property across the Document Space .  Changing a Ghost Folder property value will change the property value of all documents in the Document Space that have this property value , even though you are not able to see them in this particular view.
Type	Displays FileSphere Ghost Folder
Location	Displays the system name for the computer that this Ghost Folder's Document Space is on
Contains	Displays 0 Files
Total Size	Displays 0 bytes



See also

- [Ghost Folder menu](#)
- [Ghost Folder contents menu](#)
- [Ghost Folders](#)



Static Folder



Static folder

Static Folders are regular Windows folders. They can be used to add documents, contained in an existing folder hierarchy, to FileSphere to assist in the document migration process. They can also be used solely as a wrapper to maintain a specific association between certain documents. Even though documents may be contained in a static folder their FileSphere properties are independent of the folder and they can be classified and sorted into **View Folders** (virtual spaces) while still being contained in a static folder hierarchy.

Static Folders themselves cannot be classified, even though the documents they contain are classified, and therefore, the only time you will be able to view a **Static Folder** within FileSphere is when the **Document Space** has no **property** selected on the **View By** menu.

However, you can use the **Static Folder's** property settings via the **FileSphere** properties tab to **classify** the documents it contains. Alternatively, you can use the **Static Folder Migrate** function to assist you in migrating and classifying documents contained in the existing hierarchical folder in which they were added to FileSphere.

The use of **Static Folders** in FileSphere is optional. You can create empty **Static Folders** within FileSphere or drag and drop document containing folders and folder hierarchies from your existing **Windows** folder hierarchy into FileSphere.

To view static folders in FileSphere

- ▶ Select the **Document Space** icon.
- ▶ Click the **View By** button **or** click the down arrow (▼) and deselect the highlighted **property**.

To create static folders in FileSphere

- ▶ Repeat the above steps to ensure no **View By** is selected.
- ▶ Select the **Document Space** icon.
- ▶ Right click in the contents pane and select **New** and then **Static folder**.
- ▶ Rename the **Static Folder**

To create static sub folders

- ▶ Select a **Static Folder** icon.
- ▶ Right click in the contents pane and select **New** and then **Static folder**.
- ▶ Rename the **Static Folder**



How to access

- [Static Folder menu](#)
- [Static Folder contents menu](#)
- [Static Folder properties](#)
- [Migrate documents from Static Folders](#)



Static Folder menu



Static Folder

► Right click on a **Static Folder** and you can select from the following options:

Expand/ Collapse	Displays/ hides sub folders
Migrate ►	Allows you to select options for <ul style="list-style-type: none">• Assign Property Value ► Classifies the contents of the folder by assigning a <i>property value</i> to a <i>property</i> selected from the View By menu - contents will then be displayed in a View Folder when you View By the <i>property</i> selected.• Assign Property Name ► Adds the static folder name as a <i>property</i> to the selected business schema• Remove Static Folder The Static folder is removed and its contents are displayed in the Document Space
Explore	Opens a new Windows Explorer window for the Static Folder with folders and contents pane
Open	Opens a new Windows Explorer window for the Static Folder , contents pane only
Search	Opens the Quick Search bar on top of the contents pane. Search results are displayed in the pane below - this is equivalent to clicking the Search icon. The Quick Search bar has a link to Advanced Search.
Cut	Cuts the contents of the Static Folder and copies them to the clipboard
Copy	Copies the contents of the Static Folder to the clipboard
Paste	Pastes the contents of the clipboard to the Static Folder
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to to this particular Static Folder or Static Folder hierarchy.
Shred	Sends the Static Folder folder and its contents to the Shredder
Rename	Allows you to rename the Static Folder
Refresh	Refreshes the Static Folder contents pane
Properties	Displays the Static Folder Properties dialog box from where you can view general properties or add classification to the documents contained in the Static Folder .



See also

[Static Folder contents menu](#)
[Static Folder properties](#)
[Static Folder](#)
[Migrating documents from Static Folders](#)



Static folder contents menu



Static Folder

▶ Right click in the right contents pane of a **Static Folder** and you can select from the following options:

View	Displays options for changing the appearance of documents in the contents pane, you can select from Large Icons , Small Icons , List or Details
Arrange Icons By	Displays options for sorting icons in the contents pane (using the contents pane column headings), you can sort items by categories such as Name, Type, Size, Version, Network Peer and Time
Refresh	Updates contents pane display with current information
Paste	Standard Windows paste function
Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to this particular Static Folder (or Static Folder hierarchy).
Acquire Images	Displays a menu showing available TWAIN-compliant devices, such as scanners and digital cameras. Select a device to acquire the image. The processed image will be saved in FileSphere and this Static Folder (or Static Folder hierarchy).
New	Displays a drop down menu to allow you to: <ul style="list-style-type: none">♦ Create a new Static Folder♦ Create a new Document by selecting from the list of supported document types.
Properties	Displays the Static Folder Properties dialog box from where you can view general properties or <i>classify</i> the documents contained in the Static Folder .



See also

[Static Folder properties](#)
[Static Folder menu](#)
[Static Folder](#)



Static folder properties



Static Folder

- ▶ Right click on the **Static Folder** and select **Properties** from the menu:

The **Properties** dialog box allows you to view/ edit the following property settings by clicking on the appropriate tab:

General	Displays general folder information, which cannot be edited.
FileSphere	For classifying documents contained in the Static Folder by entering <i>values</i> against <i>properties</i>



How to

[View general properties](#)

[Classify documents contained in the Static Folder](#)



See also

[Static Folder menu](#)

[Static Folder contents menu](#)

[Static Folder](#)

Static Folder general properties



Static Folder

- ▶ Right click on a **Static Folder** icon and select **Properties** from the menu and then the **General** tab if it is not already selected.

The following information is displayed:

	Displays the name of the Static Folder
Type	Displays FileSphere Static Folder
Location	Displays the system name for the computer you are working on
Contains	Displays the number of files contained in this folder
Total Size	Displays the the total size of the files contained in this folder



See also

[Static Folder](#)

[Static Folder menu](#)

[Static Folder contents menu](#)

[Static Folder properties](#)

[Static Folder FileSphere properties and classification](#)

Static Folder FileSphere properties and classification



Static Folder




- ▶ Right click on the **Static Folder** icon and select **Properties** from the menu and then select the **FileSphere** tab.
- ◀ The FileSphere property settings for the selected static folder are displayed. Common schema **properties** are displayed first, followed by Business schema **properties** and then the application schema **properties**.

To classify documents contained in the Static Folder

- 1 ▶ Click in the **Value** column to the right of the **Property** name of the property you want to edit.
 - ◀ A **value** entry box is displayed:
 - 2 ▶ Press the keyboard down arrow to display a list of **values** for the **property**, scroll and select a **value**
 - Or**
 - 2 ▶ Type in the first letter of a **value**, to reduce the number of **values** listed, scroll and select a **value**
 - Or**
 - 2 ▶ Type in a **value**
- ▶ Repeat steps 1-2 until you have added the required classification.
- ▶ Click the **Apply** button to save changes and continue **or** click the **OK** button to save changes and close the dialog box.



Once you have added or changed a **property value** (tag), you will be able to **View by** that **property** in the **Document Space** and a  **View Folder** corresponding to the **value** will be created containing all documents that have the same **value** for the selected **property**.



Documents contained in a **Static Folder** that have been classified will remain displayed in the **Static Folder** when no **View by property** is selected for the **Document Space**. When you create **View Folders**, the documents will appear in the appropriate **View Folders** and the **Static Folders** will not be displayed.



See also

- [Static Folder](#)
- [Static Folder menu](#)
- [Static Folder contents menu](#)
- [Static Folder properties](#)
- [Static Folder general properties](#)
- [Migrating documents from Static Folders](#)



FileSphere toolbars









FileSphere options are available on toolbars in:

- ◆ **Microsoft Windows Explorer**
- ◆ **Microsoft Excel, Microsoft PowerPoint, Microsoft Project, Microsoft Visio and Microsoft Word** (please refer to www.filesphere.com for any updates to the list of Add-Ins provided).
- ◆ **Microsoft Outlook**
- ◆ **Adobe Acrobat Professional**



FileSphere Toolbar options in Windows Explorer

- Select a FileSphere space icon in the **Windows Explorer** view and the **FileSphere toolbar** will be displayed on the right of the **Windows Explorer** Standard toolbar. The following buttons are displayed, which may or not be active depending on which space you have selected :

	History	For My Workspace , In Tray and Out Tray , toggles the History pane on and off
	Search	Displays the Quick Search Bar , the search results pane and a link to Advanced Search
	Retrieval Bar	For local and central/network Document Spaces , Templates and Shredder , toggles the Retrieval Bar on and off
	New Folder	Creates a new folder for the currently selected View By property , but only if a property has been previously selected.
	Add Documents	Displays the Open dialog box, which lets you browse and select documents to add to the selected Document Space .
	Ghost Folders	Toggles the display of Ghost Folders on and off. Ghost Folder display is turned off by default.
	Unclassified documents	Toggles the display of Unclassified documents on and off. An unclassified document is one which has no value for the active view. For example if you View By Subject , View Folders will be created for each subject and the remaining documents with no Subject value will be displayed in the root space. Clicking the Unclassified documents button will turn the display of these documents on and off. If you have a Document Space with no View By property selected, in this case all of the documents are considered to be unclassified. Clicking the Unclassified documents will turn the display of all documents on and off.
	New Folder ▼	Down arrow displays the properties menu from where you can choose a property to create a new Ghost Folder with.
	View By icon	Toggles View By on and off for the most recently selected property
	View By ▼	Down arrow displays the properties menu from where you can choose a property to create View Folders with.



See also

[FileSphere Toolbar options for Microsoft Office applications](#)

[FileSphere Toolbar options for Microsoft Outlook](#)

[FileSphere Toolbar options in Adobe Acrobat Professional](#)



FileSphere toolbar options in Microsoft Office applications

FileSphere toolbar options are available in **Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Visio** and **Microsoft Word** (please refer to www.filesphere.com for any updates to the list of Add-Ins provided).

▶ With a Microsoft Office document open, the following buttons are displayed on the **FileSphere toolbar**:



Up to **Microsoft Office 2003**: if the **FileSphere** buttons are not displayed, right click on the top **menu bar** and select **FileSphere** from the menu).

Microsoft Office 2007: the **FileSphere toolbar** is a **Custom Toolbar** displayed on the ribbon under the **Add-ins** tab.

The FileSphere custom toolbar can also be added to the application's **Quick Access toolbar** for easy access.

	Open	Displays the FileSphere Open dialog box to allow you to browse and select a FileSphere document to open.
	Save	Saves changes to the active document. For new or non FileSphere documents, displays the Save As dialog box to allow you to save the document into FileSphere.
	Finalize	Publishes the document by creating a new major version, also allows you to set an expiry date and/ or delete all minor versions. FileSphere will close the document in order to Finalize it. (Not active for non FileSphere documents).



See also

[FileSphere Toolbar options for Microsoft Outlook](#)



[FileSphere Toolbar options in Adobe Acrobat Professional](#)

[FileSphere Toolbar options in Microsoft Windows Explorer](#)



FileSphere Toolbar options in Microsoft Outlook

- In **Microsoft Outlook**, the following buttons are displayed on the **FileSphere toolbar**:
(If the **FileSphere** buttons are not displayed, right click on the top **menu bar** and select **FileSphere** from the menu).

	Save	Displays the Save As dialog box to allow you to save a copy of the selected email item(s) into FileSphere
	Save Attachments	Displays the Save As dialog box to allow you to save a copy of the selected email item's attachments into FileSphere



See also

[FileSphere Toolbar options in Adobe Acrobat Professional](#)




[FileSphere Toolbar options in Microsoft Windows Explorer](#)

[FileSphere Toolbar options for Microsoft Office applications](#)



Toolbar options for Adobe Acrobat Professional

- With a PDF file open in **Adobe Acrobat Professional**, the following buttons are displayed on the **FileSphere toolbar**:
(If the **FileSphere** buttons are not displayed, right click on the top **menu bar** and select **FileSphere** from the menu).

	Open	Displays the FileSphere Open dialog box to allow you to browse and select a FileSphere PDF file to open.
	Save	Saves changes to the active PDF file. For new or non FileSphere PDF files, displays the Save As dialog box to allow you to save the PDF file into FileSphere.
	Finalize	Publishes the PDF file by creating a new major version, also allows you to set an expiry date and/or delete all minor versions. FileSphere will close the PDF file in order to Finalize it. (Not active for non FileSphere documents).



See also

- [FileSphere Toolbar options in Microsoft Windows Explorer](#)
- [FileSphere Toolbar options for Microsoft Office applications](#)
- [FileSphere Toolbar options for Microsoft Outlook](#)



FileSphere menus

FileSphere menu options are available:

- ◆ From [space and folder icon menus](#) in the **Microsoft Windows Explorer** view. As with regular Windows Explorer objects, each space or folder has two menus: a main menu and a contents pane menu.
- ◆ From [document icon menus](#) in the **Microsoft Windows Explorer** view. These menus vary depending on the space in which you are viewing the document.
- ◆ From the [FileSphere menu](#) in **Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Visio** and **Microsoft Word** (please refer to www.filesphere.com for any updates to the list of Add-Ins provided).
- ◆ From the [FileSphere menu](#) in **Microsoft Outlook**
- ◆ From the [FileSphere menu](#) of **Microsoft Outlook** messages
- ◆ From the [FileSphere menu](#) of **Adobe Acrobat Professional PDF** documents



FileSphere icon menus

FileSphere specific functions, in addition to regular Windows options, are provided on these menus.

To display a main menu

- Highlight a space, folder or document icon and right click on the icon

To display a contents pane menu

- Highlight a space or folder icon and right click in an empty space in the right contents pane.



See also

- [Document icon menus](#)
- [Microsoft Office application menus](#)
- [Microsoft Outlook menu](#)
- [Microsoft Outlook Mail Message menu](#)



See individual icon menus

- [FileSphere icon menu](#)
- [FileSphere icon contents menu](#)
- [Document Space menu](#)
- [Document Space contents menu](#)
- [Document Space document icon menu](#)
- [My Workspace menu](#)
- [My Workspace contents menu](#)
- [My Workspace document icon menu](#)
- [Favorites menu](#)
- [Favorites contents menu](#)
- [Favorites document icon menu](#)
- [View Folder menu](#)
- [View Folder contents menu](#)
- [Ghost Folder menu](#)
- [Ghost Folder contents menu](#)
- [Static folder menu](#)
- [Static folder contents pane menu](#)



Document menus



Documents

- ▶ Right click on a document icon in any space
- ◀ Document icon menus vary depend upon the space in which you are viewing the document:
 - ◆ [My Workspace document menu](#)
 - ◆ [Favorites document menu](#)
 - ◆ [Document Space document menu](#)
 - ◆ [Search results pane document menu](#)
 - ◆ [Shredder document menu](#)



Microsoft Office FileSphere menu

FileSphere menu options are available in **Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Visio** and **Microsoft Word** (please refer to www.filesphere.com for updates to the list of Add-Ins provided).

- With a Microsoft Office document open, click on the **FileSphere menu**.



Up to **Microsoft Office 2003**: if the **FileSphere menu** is accessed by selecting the **FileSphere** option on the application's **menu bar**, buttons are not displayed, right click on the top **menu bar** and select **FileSphere** from the menu).

Microsoft Office 2007: the **FileSphere menu** is a **Menu Command** displayed on the ribbon under the **Add-ins** tab. The FileSphere menu commands can also be added to the application's **Quick Access toolbar** for easy access.

The FileSphere menu provides you with the following options:

Open...	Displays the FileSphere Open dialog box to allow you to browse and select a FileSphere document to open
Close and Return	Closes the document and returns it to its Document Space .
Save	Saves changes to the active document. For new or non FileSphere documents, displays the Save As dialog box to allow you to save the document into FileSphere.
Save As...	Saves a copy of the active document in FileSphere
Finalize	Publishes the document by creating a new major version, also allows you to delete all minor versions. FileSphere will close the document in order to Finalize it.
Insert from FileSphere	For inserting a picture or other file that is stored in FileSphere
Compare Documents...	(Microsoft Word only) for using the standard Compare Documents function for comparing two FileSphere documents
Merge Documents...	(Microsoft Word only) for using the standard Merge Documents function for merging two FileSphere documents
Properties	Displays the document's Properties dialog box, from where you can view/edit the following property settings: General - includes document title, document Type, associated application, location, and size, modified and accessed details Versions - for viewing date, version details History - for viewing date, version, action type and user details for previous activities with this document FileSphere - for viewing and editing the document's property value tags (classification) and access level
Help Topics	Opens FileSphere Help
FileSphere on the Web	Opens the FileSphere homepage www.filesphere.com
Recent files - Displays a list of recently used FileSphere documents.	



See also

[Microsoft Outlook menu](#)
[Microsoft Outlook Mail Message menu](#)
[Adobe Acrobat Professional menu](#)
[FileSphere icon menus](#)
[Document icon menus](#)



Outlook FileSphere menu

- Open **Microsoft Outlook** and select **FileSphere** on the menu bar (to view all available options, select an email item before selecting **FileSphere**).
- ◄ The FileSphere menu provides you with the following options :

Save As...	Saves a copy of the selected email item(s) into FileSphere
Save attachments...	Saves a copy of the selected email item's attachments into FileSphere (this option is greyed out for messages with no attachments)
Help Topics	Opens FileSphere User Help
FileSphere on the Web	Opens the FileSphere homepage www.filesphere.com



See also

[Microsoft Outlook Mail Message menu](#)
[Adobe Acrobat Professional menu](#)
[FileSphere icon menus](#)
[Document menus](#)
[Microsoft Office applications](#)

Outlook message FileSphere menu

- Open Microsoft Outlook and open an email message or create a new message.
- Select FileSphere on the menu bar
- ◄ The FileSphere menu provides you with the following options :

Save As...	Saves a copy of the selected email item(s) into FileSphere
Save attachments...	Saves a copy of the active email item's attachments into FileSphere (this option is greyed out for messages with no attachments)
Insert from FileSphere	For inserting an attachment from FileSphere (this option is greyed out for existing email messages)
Help Topics	Opens FileSphere Help
FileSphere on the Web	Opens the FileSphere homepage www.filesphere.com



See also

[Adobe Acrobat Professional menu](#)
[FileSphere icon menus](#)
[Document menus](#)
[Microsoft Office applications](#)
[Microsoft Outlook menu](#)



Adobe Acrobat FileSphere menu

► With a PDF document open in Adobe Acrobat Professional, right click on the FileSphere option on the application's menu bar.

◀ The FileSphere menu provides you with the following options:

Open...	Displays the FileSphere Open dialog box to allow you to browse and select a FileSphere PDF document to open
Close and Return	Closes the PDF document and returns it to its Document Space .
Save	Saves changes to the active PDF document. For new or non FileSphere PDF documents, displays the Save As dialog box to allow you to save the PDF document into FileSphere.
Save As...	Saves a copy of the active PDF document in FileSphere
Finalize	Publishes the PDF document by creating a new major version, also allows you to set an expiry date and/ or delete all minor versions. FileSphere will close the PDF document in order to Finalize it. (Not active for non FileSphere PDF documents).
Properties	Displays the PDF document's Properties dialog box, from where you can view/edit the following property settings: General - includes document title, document Type, associated application, location, and size, modified and accessed details Versions - for viewing date, version details History - for viewing date, version, action type and user details for previous activities with this document FileSphere - for viewing and editing the document's property value tags (classification) and setting document access level
Help Topics	Opens FileSphere Help
FileSphere on the Web	Opens the FileSphere homepage www.filesphere.com
Recent files - Displays a list of recently used FileSphere PDF documents.	



See also

[FileSphere icon menus](#)

[Document icon menus](#)

[Microsoft Outlook menu](#)

[Microsoft Outlook Mail Message menu](#)



FileSphere documents and files

A FileSphere **document** is a file of any type that is stored in (registered with) FileSphere.

All FileSphere documents can be viewed in a **Document Space**

An additional feature of all FileSphere documents, is the document Properties (accessed via document right click menu), with tabs for **General**, **History**, **Versions**, **Security**, **Auditing** and **FileSphere** classification.






Access to documents can be restricted to specified users or user groups by assigning predefined access levels to them.



Access levels are set up and assigned to users or user groups in FileSphere Administration. A user can only see or create documents at, and below, the access level to which they are assigned.

Documents are displayed in **FileSphere** in the same way as they are in Windows Explorer: as **Large Icons**, **Small Icons**, **List**, or **Details**. **FileSphere** annotates the icon, to indicate the document's **Status** and if it has multiple **Versions**.

For example:

 Word doc.doc	Single Version A standard Document icon is displayed for documents with a single version.
 <i>Word doc.doc</i>	Pending Classification Document title is italicised, and document type is described as "pending classification" when a mandatory property has no value for the document.
 Word doc.doc	Checked Out When the document is checked out , its line of text details is shown in red and a 'prohibited' symbol is displayed on the standard icon, meaning that it cannot be edited by another user, although they can still open a read only copy..
 Word doc.doc	Multiple Versions If a Document has more than one version, multiple squares are displayed on the lower right hand corner of the standard icon to indicate multiple versions.
 Word doc.doc	Multiple Versions and Checked Out If the document has <i>multiple versions</i> and is checked out , the icon is adapted accordingly.



FileSphere documents that you have deleted can be viewed in, and restored from, the **Shredder**.

FileSphere options for a **Document**, including access to previous versions, are accessed via the **Document icon menu** in the **Document Space**. **Document icon menus** vary according to the space in which you are viewing the document. **Document** properties, including classification, security, auditing, versions and history, are accessed via the **Document Properties** dialog box.



How to access

[Document icon menus](#)

[Document properties](#)



See also

[Document versions](#)

[Document status](#)

[Adding documents to FileSphere](#)

[About classification](#)

[About retrieving documents](#)

[Working with FileSphere documents](#)

[Collaborating and sharing documents](#)



Document icon menus



Documents

Every document in FileSphere has a right click menu. In addition to regular **Windows** options, the document menu provides you with key **FileSphere** functions, which vary and are dependent upon the particular space in which you are viewing. For example the menu of a document in **Favorites**, will have options such as: **Versions** or **Remove from Favorites**, whereas the menu of a document in the **My Workspace** will have options such as **Return** or **Open**.

- ◆ [My Workspace document menu](#)
- ◆ [Favorites document menu](#)
- ◆ [Document space document menu](#)
- ◆ [Search Results pane document menu](#)
- ◆ [Shredder document menu](#)

Document Space document menu



Local Document Space



Document

► Right click on a document in the **Document Space** and you can select from the following options:

Open	to open the document with its associated application
Finalize	to publish the document by creating a new major version, also allows you to set an expiry date and/ or delete all minor versions
Versions	for viewing, opening, removing and restoring previous versions
Open With ►	to select an application with which to open the document
Send to ►	Displays a menu, which allows you to send the document to any of the following: <ul style="list-style-type: none">◆ My Workspace - checks out the document so that no one else can edit it◆ Favorites - add a shortcut to the document to the Favorites space, for easy access◆ Mail Recipient - sends the document as an email attachment◆ Location - checks out the document and places a copy in a specified non FileSphere location. The document can be edited, saved and then returned to FileSphere while version continuity is maintained.
Cut	Standard Windows cut function
Copy	Standard Windows copy function
Shred	to delete the document by moving it to the Shredder
Rename	Standard Windows rename function
Properties	Displays the Document Properties dialog box, from where you can view/ edit* the following property settings: <ul style="list-style-type: none">General - displays document title, document type, associated application, location, and size, modified and accessed detailsHistory - displays date, version, action type and user details for previous activities with this documentVersions - displays version, date, user and comment for each versionFileSphere - for viewing and editing the document's classification (property value tags) and access level



See also



[Document properties](#)
[About FileSphere documents](#)
[Document Space](#)

My Workspace document menu



My Workspace



Document

► Right click on a **document** in **My Workspace** and you can select from the following options:

Open	To open the document with its associated application
Return	Checks in the document by returning it to its Document Space
Open With ►	To select an application to open the document with
Save As	Allows you to save a copy of the document in your Document Space or that of a Network Peer
Properties	Displays the Document Properties dialog box, from where you can view/ edit* the following property settings: General - displays document title, document type, associated application, location, and size, modified and accessed details History - displays date, version, action type and user details for previous activities with this document Versions - displays version, date, user and comment for each version FileSphere - for viewing and editing the document's property value tags (classification)



See also

[Document properties](#)
[About FileSphere documents](#)
[My Workspace](#)

Favorites document menu



Favorites



Document

► Right click on a **document** in the **Favorites** space and you can select from the following options:

Open	Opens the selected document in its associated application
Versions	If document has multiple versions - for viewing, opening, removing and restoring previous versions
Send To ►	Displays a menu, which allows you to send the document to any of the following: My Workspace - checks out the document so that no one else can edit it Mail Recipient - sends the document as an email attachment Location - checks out the document and places a copy in a specified non FileSphere location. The document can be edited, saved and then returned to FileSphere while version continuity is maintained.
Remove from Favorites	Removes the link to the the selected document from the Favorites space.
Rename	Allows you to rename the selected document (in this space only), does not change the name of this document in the Document Space
Properties	Displays the Document Properties dialog box, from where you can view/ edit* the following property settings: General - displays document title, document type, associated application, location, and size, modified and accessed details History - displays date, version, action type and user details for previous activities with this document Versions - displays version, date, user and comment for each version



	FileSphere - for viewing and editing the document's property value tags (classification)
--	---



See also

[Document properties](#)

[About FileSphere documents](#)

[Favorites](#)

Search results document menu



Search results



Document

- Right click on a document in the Search results pane and you can select from the following options:

Open	to open the document with its associated application
Finalize	to publish the document by creating a new major version, also allows you to set an expiry date and/ or delete all minor versions
Versions	if document has multiple versions - for viewing, opening, removing and restoring previous versions
Open With ▼	to select a different application with which to open the document
Send to ►	Displays a menu, which allows you to send the document to any of the following: My Workspace - checks out the document so that no one else can edit it Favorites - add a shortcut to the document to the Favorites space, for easy access Network Peer - another user on your organisation's network Mail Recipient - sends the document as an email attachment MSN User - sends the document as a file via MSN or Windows Messenger. Both sender and receiver must be signed in to Messenger before the document can be sent Location - checks out the document and places a copy in a specified non FileSphere location. The document can be edited, saved and then returned to FileSphere while version continuity is maintained.
Shred	To delete the document by moving it to the Shredder
Rename	Standard Windows rename function. Renaming a file in Templates also renames the file in its Document Space
Properties	Displays the Document Properties dialog box, from where you can view/ edit* the following property settings: General - displays document title, document type, associated application, location, and size, modified and accessed details History - displays date, version, action type and user details for previous activities with this document Versions - displays version, date, user and comment for each version FileSphere - for viewing and editing the document's property value tags (classification)



See also

[Search](#)


[Document icon menus](#)



Shredder document menu

**Shredder****Document**

► Right click on a **document** in the **Shredder** and you can select from the following options:

Restore	Restores the document to its original Document Space and with the same classification as prior to deletion.
Remove	<p>Deletes the document from the Shredder.</p>  <p>Although when you delete a document from the Shredder it is permanently deleted, your FileSphere administrator can restore documents from the administration section of FileSphere, if required.</p>
Properties	<p>Displays the Document Properties dialog box, from where you can view/ edit* the following property settings:</p> <p>General - displays document title, document type, associated application, location, and size, modified and accessed details</p> <p>History - displays date, version, action type and user details for previous activities with this document</p> <p>Versions - displays version, date, user and comment for each version</p> <p>FileSphere - for viewing and editing the document's property value tags (classification)</p>

**See also**[Document properties](#)[About FileSphere documents](#)[Shredder](#)



Document icon properties



Document

- ▶ Right click on a **Document** icon and select **Properties** from the menu.

The **Properties** dialog box allows you to view/ edit* the following property settings by clicking on the appropriate tab:

General	Displays document title, document type, associated application, location, and size, modified and accessed details. Allows you to set/ reset the document Expiry date
Versions	Displays version history details. Allows you to open and delete previous versions. You can also add comments to versions.
History	Displays a complete history of previous activities with this document including viewing date, version, action type and user details.
FileSphere	Allows you to view / edit the document's classification (<i>property value</i> tags) and access level



How to

- [View/ edit general properties](#)
- [View history](#)
- [View/ manage versions](#)
- [View/ edit FileSphere properties](#)



See also

- [Document versions](#)
- [Document status](#)
- [Document icon menus](#)
- [About FileSphere documents](#)

General properties



Document

- ▶ Right click on a **Document** icon, select **Properties** from the menu and then the **General** tab, if it is not already selected. The following information is displayed:

	Document name, which can be changed if you are viewing the document in its Document Space , Templates or the Search results pane.
Type of file	Displays the file type, such as Microsoft Word Document.
Opens with	Displays the application associated with the file
Location	Displays the system name for the computer on which this document is stored.
Size	Displays the size of the file
Document Type	Displays the file type associated with this document's extension. The Change... button allows you to associate a different application with the file.
Created	Displays the date and time the document was created.
Modified	Displays the date and time the document was last modified.
Accessed	Displays the date and time the document was last accessed.



See also

[Viewing history](#)

[Viewing/ managing versions](#)

[Viewing/ editing filesphere properties \(classification\)](#)

History



Document

- ▶ Right click on a **Document** icon, select **Properties** from the menu and then the **History** tab, if it is not already selected. The following is displayed for the document:

Current Status	Indicates whether the document is Checked In or Checked Out
Export	The Export button allows you to export a comma delimited file of the history details.

The following information is displayed for each action that has been performed with this document

Date	Displays the date and time of the action
Version	Displays the document version
Action	Displays the action performed, such as Return, Check In, Open.
User	Displays the domain and user name of the user that performed the action.



See also

[Viewing/ managing versions](#)

[Viewing/ editing filesphere properties \(classification\)](#)

[Viewing general properties](#)

Versions



Document

- ▶ Right click on a **Document** icon, select **Properties** from the menu and then the **Versions** tab, if it is not already selected.
- ▶ A list of previous versions is displayed.
- ▶ The drop down list allows you to select to view **All** versions or **Major** versions or **Minor** versions.
- ▶ The **Export** button allows you to export a comma delimited file of the version details.

The following is displayed for each previous version of the document:

Version	Displays the version number
Date	Displays the date and time the version was created
User	Displays the domain and user name of the user that created the version.
Comment	Displays a free text comment for the version. You can click in the Comment box and add or delete a comment.

To open a previous version

- ▶ Highlight the document version and click the **Open** button.



To remove a previous version

- ▶ Highlight the document version and click the **Remove** button.



See also

[Viewing/ editing filesphere properties \(classification\)](#)
[Viewing general properties](#)
[Viewing history](#)

FileSphere properties & classification



Document

- ▶ Right click on a **Document** icon and select **Properties** from the menu and then select the **FileSphere** tab.
- ▶ The FileSphere property settings for the selected document are displayed, starting with the [classification](#) schemas. Common schema [properties](#) are displayed first, followed by Business schema [properties](#) and then the application schema [properties](#).

To classify the document

- ▶ Click in the **Value** column to the right of the **Property** name of the property you want to edit.
 - ▶ A **value** entry box is displayed:
 - ▶ Press the keyboard down arrow to display a list of **values** for the **property**, scroll and select a **value**
 - Or
 - ▶ Type in the first letter of a **value**, to reduce the number of **values** listed, scroll and select a **value**
 - Or
 - ▶ Type in a **value**
- ▶ Repeat steps 1-2 until you have added the required classification.
- ▶ Click the **Apply** button to save changes and continue **or** click the **OK** button to save changes and close the dialog box.



Once you have added or changed a **property value** (tag), you will be able to **View by** that **property** in the **Document Space** and a **View Folder** corresponding to the **value** will be created containing all documents that have the same **value** for the selected **property**.



See also

[Viewing general properties](#)
[Viewing history](#)
[Viewing/ managing versions](#)



Version control

FileSphere performs automatic versioning as you work by applying both major and minor versions. Minor version numbering is used for new versions created when documents are edited and major version numbering is used for Finalized (or published) documents.

Examples of major version numbers are 1.0, 2.0, 3.0

Examples of minor versions numbers are 0.1, 0.2, 0.3, 1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4

Previous versions can be opened, edited and saved as a new document or deleted. Access to previous versions is via the document menu using the Windows Explorer interface or via the **Versions** tab in the document's **Properties** dialog box.



How to

[Work with document versions](#)



See also

[Document status](#)

[Document icon menus](#)

[Document properties](#)

[About FileSphere documents](#)



Document status

Document status is used to indicate whether documents are **Checked In**, **Checked Out** or **Finalized**. When you open or close a document FileSphere automatically checks the document in and out of your **Document Space**.

Checked In

A document that is **Checked In** is in the **Document Space** and available for viewing or editing.

Checked Out

A document that is **Checked Out** may be **open** or **sent to another location**, such as **My Workspace**, a **non FileSphere location**, a **Network Peer**, an **MSN Messenger user** or an **email recipient**.

When you send a document to another user or location, you can choose whether to check the document out or not:

- ◆ If you check the document out, you will not be able to edit the document and when the document is returned it will become the latest version of the file.
- ◆ If you choose not to check the document out, you will not be able to return a new version of the document with the same filename.



View the **Options** tab in **FileSphere Properties** to see if **FileSphere** is set up to prompt you to **Check out** documents when you send them.

Finalized

When a document is **Finalized**, it indicates that a major **read only** version of the document has been created. This is the equivalent of **publishing** the document. If you edit and save a finalized document, it will be automatically saved as the next minor version.



If a **Finalized** document is opened or sent to another user or location, its status will be displayed as **Checked out** until it is returned to the **Document Space**.



How to

- [Finalize documents](#)
- [Cancel Finalization](#)



See also

- [Document icon menus](#)
- [Document properties](#)
- [Document versions](#)
- [About FileSphere documents](#)



Adding documents and emails to FileSphere

[About adding documents](#)

[Adding Microsoft Office documents](#)

[Adding email item\(s\) from Microsoft Outlook](#)

[Adding documents of any file type in the Windows Explorer view](#)

[Creating new documents in the Windows Explorer view](#)

[Scanning in documents in the Windows Explorer view](#)

[Adding PDF documents in Adobe Acrobat Professional](#)



About adding documents and emails to FileSphere

There are various ways to add documents to FileSphere:

- ◆ [Microsoft Office application documents that are open](#) can be added using **FileSphere options** within their application.
- ◆ [Email messages and attachments](#) can be added, using **FileSphere options** within **Microsoft Outlook**
- ◆ [Documents of any any file type](#), can be **dragged & dropped** or **copied & pasted** into a **Document Space**, in the **Windows Explorer** view of **FileSphere**
- ◆ [New documents](#) can be created and added in the **Windows Explorer** view of **FileSphere**
- ◆ [Hardcopy](#) documents can be scanned directly into the **Windows Explorer** view of **FileSphere**.



Adding Microsoft Office documents

- ▶ Open or create the document as you would normally in a **Microsoft Office** application.
- ▶ Click the **Save** button on the **FileSphere toolbar** *or* select **Save** from the **FileSphere menu**.
- ▶ The **Save As** dialog box is displayed
- ▶ Select a **Document Space** (you can click the FileSphere icon on the left side to display available **Document Spaces**).
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
 - Optional - to classify in addition to automatic classification*
 - ▶ Enter values against properties (see [How to classify using document property settings](#))
 - or*
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View & Ghost Folders](#))
- ▶ Type in a **File name** for the document (or accept the default shown) and click the **Save** button
- ▶ Click **OK** to confirm that the document will be closed and re-opened to save it.
- ▶ The document will be saved in the selected **Document Space** with a status of **Checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the document, it will be returned, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **Checked In**.



See also

- [Adding email item\(s\) from Microsoft Outlook](#)
- [Adding documents of any file type in the Windows Explorer view](#)
- [Creating new documents in the Windows Explorer view](#)
- [Scanning documents in the Windows Explorer view](#)
- [Adding / creating new PDF documents in Adobe Acrobat Professional](#)



Adding email item(s) from Microsoft Outlook

You can add [emails](#) (including attachments) or just email [attachments](#) to FileSphere from Microsoft Outlook. When an email is added to FileSphere it is auto classified as its email properties, such as [From](#), [To](#), [Sent Date](#) and [Received Date](#) are also added to FileSphere.

To manually add an email to FileSphere

- ▶ In Microsoft Outlook, select one or more emails
- ▶ Select [Save As](#) from the **FileSphere menu**.
- ▶ The [Save As](#) dialog box is displayed.
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
 - ▶ **Optional** - to classify in addition to automatic classification
 - ▶ Enter values against properties (see [How to classify using document property settings](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View & Ghost Folders](#))
- ▶ Click the [Save](#) button
- ▶ The emails will be saved in the selected **document dpace**
- ▶ In **Outlook** the email will be annotated with the fact that you have added it to FileSphere and if you try to add the email again, a warning message will be displayed.

To manually add email attachments to FileSphere

- ▶ Select an email with attachments
- ▶ Select [Save Attachments](#) from the **FileSphere menu**.
- ▶ The [Save As](#) dialog box is displayed.
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
 - ▶ **Optional** - to classify in addition to automatic classification
 - ▶ Enter values against properties (see [How to classify using Properties](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View & Ghost Folders](#))
- ▶ Click the [Save](#) button
- ▶ The attachments will be saved in the selected **Document Space**
- ▶ In **Outlook** the attachments will be annotated with the fact that you have added them to FileSphere and if you try to add them again, a warning message will be displayed.



See also

- [Adding documents of any File Type in the Windows Explorer view](#)
- [Creating new documents in the Window Explorer view](#)
- [Scanning documents in the Windows Explorer view](#)
- [Adding / creating new PDF documents in Adobe Acrobat Professional](#)
- [Adding new & existing Microsoft Office Documents](#)



Adding Documents of any file type

- ▶ Open **Windows Explorer** and double click on the FileSphere icon *or* double click on the FileSphere desktop icon
- ▶ Select a **Document Space**.
 - Optional* - to classify added documents
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [How to create View/ Ghost Folders](#))
 - or* - once the document is added
 - ▶ Use the document **Properties** dialog box to enter values against properties (see [How to classify using Properties](#))
- ▶ Click the **Add documents** button on the **FileSphere toolbar** *or* right click in the contents pane and select **Add documents** from the menu
- ▶ The **Open** dialog box is displayed, which allows you to browse and locate files.
- ▶ When you have located the files you want to add, select them and then click the **Open** button

Alternatively:

- ▶ Locate the files you want to add, select them and drag & drop *or* copy & paste them to the selected **Document Space** or lowest level folder in a **View/ Ghost Folder** hierarchy
- ▶ A **Transferring...** dialog box will be displayed as the selected files are added.



See also

- [Creating new documents in the Windows Explorer view](#)
- [Scanning documents in the Windows Explorer view](#)
- [Adding / creating new PDF documents in Adobe Acrobat Professional](#)
- [Adding email item\(s\) from Microsoft Outlook](#)



Creating new documents in the Windows Explorer view

- ▶ In Windows Explorer, select the **Document Space**.
 - Optional - to classify new documents*
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [How to create View/ Ghost Folders](#))
 - or - once the document is created*
 - ▶ Use the document **Properties** dialog box to enter values against properties (see [How to classify using Properties](#))
- ▶ Right click in the contents pane and select **New** from the menu followed by the **Type** (file type) of document you want to create (e.g. Microsoft Word Document).
- ▶ A new document of the selected **Type** will be created. The document's name is displayed in edit mode so that you can rename it.
- ▶ Rename the new document (if a file extension is displayed, take care not to overwrite it).
- ▶ You have created a FileSphere document, which you can open and edit.



See also

- [Scanning documents in the Windows Explorer view](#)
- [Adding / creating new PDF documents in Adobe Acrobat Professional](#)
- [Adding new & existing documents from within Microsoft Office](#)
- [Manually adding email item\(s\) from Microsoft Outlook](#)
- [Adding documents of any File Type in the Windows Explorer view](#)



Scanning in documents in the Windows Explorer view

You can scan and add documents to FileSphere using any TWAIN-compliant scanner that is connected to your computer.

- ▶ Place the document to be scanned in the scanner, in accordance with the scanner's online help or manual.
- ▶ Select a **Document Space** in the **Windows Explorer** view of FileSphere.
 - Optional* - to classify scanned documents
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View & Ghost Folders](#))
 - or* - once the document is scanned into FileSphere
 - ▶ Use the **Properties** pane on the right side of the **Save As** dialog box to enter values against properties (see [How to classify using document property settings](#))
- ▶ Right click in the contents pane and select **Acquire Image** from the menu.
- ▶ Use the scanner's interface to set the document scanning options. For help using the interface, consult its online help or manual.
- ▶ When the scan is complete, the image is sent to FileSphere and saved in the specified **Document Space**.
- ▶ You can scan further documents or close the scanner's interface to return to FileSphere.



See also

- [Adding /creating new PDF documents in Adobe Acrobat Professional](#)
- [Adding new & existing documents from within Microsoft Office](#)
- [Manually adding email item\(s\) from Microsoft Outlook](#)
- [Adding documents of any File Type in the Windows Explorer view](#)
- [Creating new documents in the Windows Explorer view](#)



Adding PDF documents in Adobe Acrobat

- ▶ Open or create the PDF document as you would normally in **Adobe Acrobat Professional**.



You can open a document from FileSphere in order convert it to a PDF file by selecting **Open** from the **FileSphere menu**.

- ▶ Click the **Save** button on the **FileSphere toolbar**.
- ▶ The **Save As** dialog box is displayed
- ▶ Select a **Document Space** (you can click the FileSphere icon on the left side to display available **Document Spaces**).
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.

Optional - to classify in addition to automatic classification

- ▶ Enter values against properties (see [How to classify using document property settings](#))
- or
- ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View & Ghost Folders](#))



Support for XMP, Adobe's Extensible Metadata Platform, is built into FileSphere.

- ▶ Type in a **File name** for the PDF document (or accept the default shown) and click the **Save** button
- ▶ Click **OK** to confirm that the document will be closed and re-opened to save it.
- ▶ The PDF file will be saved in the selected **Document Space** with a status of **Checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the PDF file, it will be returned, which means the link will be removed from **My Workspace** and its status in its **Document Space** will change to **Checked In**.



See also

[Adding new & existing Microsoft Office Documents](#)
[Manually adding email item\(s\) from Microsoft Outlook](#)
[Adding documents of any file type in the Windows Explorer view](#)
[Creating new documents in the Windows Explorer view](#)
[Scanning documents in the Windows Explorer view](#)



Classifying documents

[About classification](#)

[Classification using the Properties dialog box](#)

[Classification using View & Ghost Folders](#)



About classification

FileSphere automatically **classifies documents** (assign tags to them) when you add them, based on their native file properties. You can also **further classify** documents by adding values to business and application properties.

Sets of **property value** tags (collectively known as metadata) are used for classification. The property components for these tags are set up in tables, known as schemas, which are installed with FileSphere.



Refer to the **FileSphere Administrator Help** for further information on managing classification schemas [available from the **Windows® Start menu > Programs > FileSphere Personal > Administrator Help**].



Support for XMP, Adobe's Extensible Metadata Platform, is built into FileSphere.

You can classify your documents by adding, removing and changing FileSphere **property values** in a number of ways:

- ◆ Using a document's **Properties** dialog box to add or change **property values**. Access levels are also changed in the document's **Properties** dialog box, in the Document Management System section.
- ◆ By adding documents to **View/Ghost Folders** whereby documents inherit each folder's **property value**
- ◆ If documents are contained in a **Static Folder** in FileSphere, by using the **Static Folder's Properties** dialog box to add or change **property values**
- ◆ By renaming a **View Folder**, in the **Windows Explorer** view (View Folder name = a **property value**).



How to

[Classify using the Properties dialog box](#)

[Classify using View & Ghost Folders](#)



Classification using the Properties dialog box

In the **Properties** dialog box you can add values to properties to **classify** the selected document(s). You can access the Properties dialog box of any file type in the Windows Explorer view. For **Microsoft Office** application documents, you can also access the **Properties** dialog box when the document is open and when in the **Save** and **Save As...** dialog boxes.

- ▶ In the **Windows Explorer** view, right click on a document (or static folder), select Properties from the menu and then select the **FileSphere** tab.



You can select multiple documents or static folders. Where documents have different values for a property (tags), you will see the value displayed as "(multiple values)".

Or

- ▶ With a **Microsoft Office** application document open, select **Properties** from the **FileSphere menu**
- ▶ The FileSphere property settings for the selected documents (or static folders) are displayed. Common schema properties are displayed first, followed by Business schema properties, the application schema properties and then the Document Management System properties (where access level is set).



Certain application properties, which are **Read Only**, are not displayed, such as **Creation Date** or **Last Accessed by**, which cannot be changed because they are derived from the system or application schemas associated with the document.

To classify the document

- ▶ Click in the **Value** column to the right of the **Property name** of the property you want to edit.
▶ A **value** entry box is displayed:
- ▶ Press the keyboard down arrow to display a list of **values** for the **property**, scroll and select a **value**

Or

- ▶ type in the first letter of a **value**, to reduce the number of values listed, scroll and select a **value**

Or

- ▶ type in a **value**
- ▶ Repeat steps 1-2 until you have added the required classification.
- ▶ Click the **Apply** button to save changes and continue **or** click the **OK** button to save changes and close the dialog box.



Once you have added or changed a **property value** (tag), you will be able to View by that **property** in the **Document Space** and a **View Folder** corresponding to the **value** will be created containing all documents that have the same **value** for the selected **property**.



Documents contained in a **Static Folder** that have been classified will remain displayed in the **Static Folder** when no View by property is selected for the **Document Space**. When you create **View Folders**, the documents will appear in the appropriate **View Folders** and the **Static Folders** will not be displayed.



See also

[Classification using View & Ghost Folders](#)
[About classifying documents](#)



Classification using View & Ghost Folders

Documents 'inherit' the metadata properties of the **View/ Ghost Folder** or a **View/ Ghost Folder** hierarchy in which they are placed. You can classify your documents using **View/ Ghost Folders** in the following ways:

- ▶ When saving **Microsoft Office** application documents by creating a **View/ Ghost Folder** or a **View / Ghost Folder** hierarchy in the **Save** and **Save As** dialog boxes.
- ▶ By adding documents to a **View/ Ghost Folder** or a **View/ Ghost Folder** hierarchy in the **Windows Explorer** view
- ▶ By dragging & dropping documents into or out of a **View/ Ghost Folder** or a **View/ Ghost Folder** hierarchy in the **Windows Explorer** view.
- ▶ By renaming a **View Folder**, in the **Windows Explorer** view, which changes the property value on which the **View Folder** is based, for each document contained in the folder.

To create View & Ghost Folders

- 1 ▶ Select a **Document Space** and click the **View By** button or right click on the **Document Space** and select **View By** from the FileSphere menu
- 2 ▶ Select a **property** from the list of **properties** displayed
- ▶ **View** and **Ghost Folders** (values) will be displayed for the selected **property**.



Ghost folders are hidden by default, but you can turn them on and off display by clicking the **Ghost Folders** button

- ▶ If a **View** or **Ghost Folder** with the required value is not displayed, click the **New Folder** button
 - ▶ Rename the new **Ghost Folder** with the required **value**
- 3 ▶ Double click on the **View/Ghost Folder** with the required **value** it to open it
 - ▶ Repeat steps 1-3 until you have created **View/Ghost Folders** with the required **property values** and double click on the lowest folder in the hierarchy to open it



See also

[Classification using the Properties dialog box](#)
[About classifying documents](#)



Retrieving documents

[About retrieving documents](#)

[Using the Retrieval Bar](#)

[Using View By to create View Folders](#)

[Using FileSphere Search](#)



About retrieving documents

FileSphere offers you different ways of retrieving documents so that you can choose the one that best suits the way in which you work:

1. Using the [Retrieval bar](#) to drill down through selected **View Folders**
2. Using [View By](#) to create **View Folders** and filter documents
3. Using the [FileSphere Search](#)

You can use any of the above regardless of whether you are in a **Microsoft Office** application **Open** dialog box or in the **Windows Explorer** view of FileSphere.



See also

[Classifying documents](#)



Using the Retrieval Bar

The **Retrieval bar** is located above the contents pane in the **Windows Explorer** view of FileSphere and **Microsoft Office** dialog boxes.



If you can't see the **Retrieval bar**, click the **Retrieval bar** button, which toggles the **Retrieval bar** on and off.

The **Retrieval bar** allows you to pinpoint documents by entering a selection of document tags (**property** and **value** pairs), which drill down to a particular **View Folder** in a **View Folder** hierarchy that you define. This provides a more direct method of retrieving documents because it removes the need to **View By**, select a **View Folder** and then **View By** again etc.

You don't need to remember the names of **properties** and **values** because as you type in the **Retrieval bar** it prompts you with lists of **properties** and **values** to aid you with your selections.

The **Retrieval Bar** has different modes for retrieving documents:

◆ **Free metadata retrieval**

Lets you type in any **property** or **value**.

If you type in a **property**, this is the same as selecting **View By** a **property** and **View Folders** are created to group documents with like values.

If you type in a **value**, FileSphere retrieves all documents that have that value anywhere in their metadata, i.e. against any property.



You can include a **free metadata value** search on the end of a retrieve using properties search by typing in the value after the last forward slash.

◆ **Retrieve using properties**

This is the basic mode that involves entering a **property** followed by a **value**, one or more times.

This method creates **View Folders** according to the **properties** and drills down through them according to the **values**, to help you locate a document.



You don't need to type in whole **properties** and **values** because the **Retrieval Bar** prompts you with lists when you press the down arrow key or type in the first letter of a **property** or **value**.

◆ **Retrieve using values**

This mode provides unrestricted access to all FileSphere metadata. It allows you to type in any letter and FileSphere will display all **values** and **properties** that begin with that letter or press the down arrow key and a list of all **properties** and **values** will be displayed, which indicates which are **values** and which are **properties**. If you select a **value**, FileSphere will prompt you with a list of available **properties** to select from. If you select a **property** FileSphere will prompt you with a list of available **values** to select from. You can repeat entering either **values** or **properties** first until you have located your document. This mode is designed for when you know little or nothing about the document you are searching for. It may take longer than using the **Using properties** mode because FileSphere has to analyse all classification for all documents.

Free metadata retrieval

value↵

- ▶ Click once in the **Retrieval bar**
- ▶ Type in a **value** and press the **Enter key**
All documents that have that **value** anywhere in their **properties** will be displayed



If too many documents are retrieved you can limit the selection by first typing in one or more **property=value** pairs (see [Retrieve using properties mode](#)) and then typing in the **value**.

Retrieve using properties

property=value/property=value/property=value↵

1. ▶ Ensure the **Retrieve using values** button is not selected.
2. ▶ Click once in the **Retrieval bar**
3. ▶ Press the **down arrow key** to display a list of **properties** **or** type the first letter of a **property** to display a restricted list of **properties**.
4. ▶ Use the **arrow keys** (↓↑) to highlight a **property**
5. ▶ Type an equals sign (=)



- A list of **values** for the selected **property** will be displayed
6. ▶ Use the **arrow keys** (↓↑) to highlight a **value**
You've now made your first **property=value** tag selection
 7. ▶ Type a forward slash (/)
A list of **properties** will be displayed, which you can restrict by typing the first letter of a **property**
 8. ▶ Use the **arrow keys** (↓↑) to highlight a **property**
 9. ▶ Type an equals sign (=)
A list of **values** for the selected **property** will be displayed
 10. ▶ Use the **arrow keys** (↓↑) to highlight a **value**
You've now made your second **property=value** tag selection

▶ Repeat steps 7-10 until you've entered **property=value** tags to identify your document.

To display documents only:

- ▶ Type a forward slash (/) and press the **Enter** key
- ◀ Documents in the lowest level **View Folder** in the **View Folder** hierarchy you have specified will be displayed. Any subsequent **View Folders** to which the documents belong will be collapsed.

OR

To display any further View Folders as well as documents:

- ▶ Press the **Enter** key
 - ◀ **View Folders** and documents will be displayed in the lowest level **View Folder** in the **View Folder** hierarchy you have specified.
- ▶ If too many documents are displayed you can click back in the **Retrieval bar** (after the last forward slash) press the **down arrow key** (↓) and continue making **property=value** selections

Summary of property access

Do not press the **Enter** key until you have completed your selection of **properties** and **values**

A forward slash (/) prompts the **properties** list.

An equals sign (=) prompts the **values** list for the selected **property**.

Select **properties** and **values** using the **arrow keys** (↓↑) only

End your selection with a forward slash (/) to display only documents

Retrieve using values

1. ▶ Click the **Retrieve using values** button on the right hand side of the **Retrieval bar**
2. ▶ Click once in the **Retrieval bar**
3. ▶ Type in all or part of a **property** or a **value**
A list of **values** and **properties**, that begin with what you have typed, will be displayed. **Values** are displayed as black text and **properties** (and the schema to which they belong) are displayed in blue text.
4. ▶ Use the **arrow keys** (↓↑) to highlight a **property** or a **value**
5. ▶ Type an equals sign (=)
If you selected a property, a list of available **values** will be displayed or if you selected a **value**, a list of available **properties** will be displayed.
6. ▶ Use the **arrow keys** (↓↑) to highlight a **value** or a **property**
You've now made your first **property=value** or **value=property** tag selection.
Note that FileSphere always displays the selection as **property=value**, regardless of whether you selected by **property** or a **value** first
7. ▶ Type a forward slash (/)
A list of **properties** will be displayed, which you can restrict by typing the first letter of a **property** or alternatively you can type in all or part of a **property** or a **value**.
A list of **values** and **properties**, that begin with what you have typed, will be displayed. **Values** are displayed as black text and **properties** (and the schema to which they belong) are displayed in blue text.
8. ▶ Use the **arrow keys** (↓↑) to highlight a **property** or a **value**
9. ▶ Type an equals sign (=)
If you selected a property, a list of available **values** will be displayed or if you selected a **value**, a list of available **properties** will be displayed.
10. ▶ Use the **arrow keys** (↓↑) to highlight a **value** or a **property**
You've now made your first **property=value** or **value=property** tag selection.
Note that FileSphere always displays the selection as **property=value**, regardless of whether you selected by **property** or a **value** first



- ▶ Repeat steps 7-10 until you've entered **property=value** tags to identify your document.

To display documents only:

- ▶ Type a forward slash (/) and press the **Enter** key
- ◀ Documents in the lowest level **View Folder** in the **View Folder** hierarchy you have specified will be displayed. Any subsequent **View Folders** to which the documents belong will be collapsed.

OR

To display any further **View Folders** as well as documents:

- ▶ Press the **Enter** key
- ◀ **View Folders** and documents will be displayed in the lowest level **View Folder** in the **View Folder** hierarchy you have specified.

- ▶ If too many documents are displayed you can click back in the **Retrieval bar** (after the last forward slash) press the **down arrow key** (↓) and continue making **property=value** selections

Summary of value access mode

Do not press the **Enter** key until you have completed your selection of **properties** and **values**

Typing in a letter or word prompts a list of both **properties** and **values**

A forward slash (/) prompts the **properties** list.

An equals sign (=) prompts the **values** list if a **property** is selected or the **properties** list if a **value** is selected.

Select **properties** and **values** using the **arrow keys** (↓↑) only

End your selection with a forward slash (/) to display only documents



If you wish to retrieve documents based on application specific properties, such as **XMP metadata** for **Adobe PDF** documents or **From, To, Cc, Date Received** for email messages, then it is advisable to make **Type** your first selection, e.g. enter **Type=Adobe PDF** or **Type=Outlook Message**.



See also - Retrieving documents:

[Using View By to create View Folders](#)

[Using FileSphere Search](#)

[About retrieving documents](#)



Retrieving documents using View By

View By can be accessed on the **FileSphere toolbar** or by right clicking on a **Document Space** or **View Folder** in the **Windows Explorer** view of FileSphere and in **Microsoft Office** dialog boxes

Using **View By** allows you to create **View Folders** to filter documents by their **property** and **values** (document tags). **View Folders** can be opened and the documents filtered again using **View By** to create further **View Folders**, which in turn can be further filtered until you have created an hierarchy of **View folders** and located the required document.



You can sort individual **View Folders** that are on the same level, by different **properties**. For example, you could sort within the **View Folder** for **Client A** by (document) **Type** while sorting within the **View Folder** for **Client B** by **Subject**.

- ▶ To collapse further **View Folders**, click on the **View Folder** button on the **FileSphere toolbar** or right click and select the highlighted **property** from the **View By** menu.

Creating View Folders

- ▶ Select a **Document Space** and click the **View By** button or right click on the **Document Space** and select **View By** from the menu
- ▶ Select a **property** from the list of **properties** displayed
- ▶ **View Folders** (**values**) will be displayed for the selected **property**.



Documents with no value (unclassified) for the selected **property** remain displayed in the root folder. You can turn the display of these unclassified documents on or off by clicking the **Unclassified** documents button

- ▶ Double click on the **View Folder** with the required **value** it to open it
- ▶ Repeat steps 1-3 until you have created **Folders** with the required property values and **double click** on the lowest folder in the hierarchy to open it



Clicking the **View By** button on the toolbar creates/collapses **View Folders** for the previously selected property. Click the down arrow to select a new property to View By



See also - Retrieving documents:

[Using the Retrieval bar](#)

[Using FileSphere Search](#)



Using FileSphere Search



Search

If you are unable to locate files using the **Retrieval Bar**; or **View By** to create **View Folders**; or if you just prefer to search for documents, FileSphere provides you with a **Quick Search Toolbar** and an **Advanced Search**.

Search results, showing document details and status, exactly as they are displayed in your **Document Space** are displayed below the **Quick Search Toolbar**. You can open and work on any documents listed in search results.

Quick search

- ▶ Click the FileSphere **Search** icon or right click on a **space** or **View Folder** and select **Search** from the menu.
The **Quick Search** bar is displayed at the top of the right contents pane.
- ▶ Enter search criteria as follows:
 - Look for** – type all or part of the name of the document name. Search will retrieve files with this text anywhere in the file name. You can also use wildcard characters and/ or specify a file extension to search for.
 - Containing** – type a word or phrase that is contained in the document
 - In** – select the the space, in which you want to search, from the drop down list of available spaces.

Advanced search

- ▶ Click the FileSphere **Search** icon or right click on a **space** or **View Folder** and select **Search** from the menu.
- ▶ Click the **Advanced Search** link on the right of the **Quick Search** bar.
- ▶ Firstly select the the space you want to search in from the **In:** drop down list of available spaces.
Advanced Search has three tabs: **General**, which is already selected, **FileSphere** and **More Choices**.

General

- ▶ You can search under the **General** tab using the following fields:
 - **Named** – type all or part of the document name
 - **Containing Text** – type a word or phrase that is contained in the document
 - **Of Type** – this defaults to All but you can select a document type from the drop down list.
 - **Status** – this defaults to All but you can select any document status from the drop down list.

FileSphere

- ▶ Select the **FileSphere** tab.
You can define further search criteria using any FileSphere attributes.
- ▶ Click the **Attributes** button and select a FileSphere **attribute** and then the **field** on which you want to search.
- ▶ Select one of the following from the **Conditions drop down list**:
 - **Contains**
 - **Is (matches exactly)**
 - **Does not contain**
 - **Is empty**
- ▶ Enter a **Value**.
- ▶ Click the **Add to list** button.
You will see your search query added to the **Find items that match these criteria** list.
- ▶ To remove an item from the search criteria list, first highlight it and then click the **Remove** button.

More Choices

- ▶ Select the **More Choices** tab
You can further refine your search using date and file size using the following fields:
 - **Date** – select the check box and then select from **Modified**, **Created** or **Accessed**.
 - Select the appropriate radio button to search **Between** a date range, or **during the previous** specified number of **months** or **days**.
- ▶ Click the **Search Now** button
Documents matching your search criteria will be displayed as they would be in the **Document Space**.
- ▶
To reset the **Advanced Search**, click the **New Search** button



See also - Retrieving documents:

[Using the Retrieval bar](#)

[Using View By to create View Folders](#)

[About retrieving documents](#)



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Working with FileSphere documents

You can work with FileSphere documents in the **Windows Explorer** view or for supported **Microsoft Office** application documents, directly through their associated application (**Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Viso**, **Microsoft Word**). You can also work with FileSphere PDF files in **Adobe Acrobat Professional**.

Using the **Windows Explorer** interface, you can classify, retrieve, edit, delete and add FileSphere documents. FileSphere functionality is provided through the [FileSphere toolbar](#) and FileSphere space and folder [menus](#).

When working with **Microsoft Office** application documents and in **Adobe Acrobat Professional**, you can access FileSphere functionality from within these applications using the **FileSphere toolbar** or the options on the **FileSphere menu**.



Windows Explorer view - How to

- [Add documents](#)
- [Create new documents](#)
- [Classify documents](#)
- [Open documents](#)
- [Save documents](#)
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Microsoft Office applications - How to

- [Add/ create new documents](#)
- [Classify documents](#)
- [Open documents](#)
- [Save documents](#)
- [Finalize \(publish\) documents](#)



Adobe Acrobat Professional - How to

- [Add/ create new PDF documents](#)
- [Open PDF documents](#)
- [Save PDF documents](#)



Working in the Windows Explorer view

Using the **Windows Explorer** interface, you can classify, retrieve, edit, delete and add FileSphere documents. FileSphere functionality is provided through the [FileSphere toolbar](#) and FileSphere space and folder [menus](#).



How to

- [Add documents](#)
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- [Delete documents from Shredder](#)
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Opening FileSphere documents in the Windows Explorer view

You can open documents to [edit](#) them or you can open them for [viewing](#) purposes only

- ▶ Double click on the FileSphere icon on your desktop or open Windows Explorer and click on the FileSphere icon.
- ▶ Select the **Document Space** in which the document is located



You can use the Retrieval Bar or create View/ Ghost Folders to help you locate documents (see [About retrieving documents](#) for further information)

To open a document for editing

- ▶ Double click on the document or right click on the document and select Open.
- ◀ The document will be opened with its associated application.
- ◀ FileSphere will check out the document and place a copy in My Workspace.
- ◀ You can work on the document and save any changes using its application's regular **Save** function.
- ◀ Once you close the document, the document will be returned from **My Workspace** to the originating **Document Space** and its status will be set to **checked in**.

To open a document for viewing only

- ▶ Right click on a document and select [View](#).
- ◀ The document will be opened with its associated application in **Read only** mode.
- ◀ The document is not checked out and if you try to save changes you will be prompted to save it as a new document.




See also

[Opening documents in Microsoft Office](#)

[Opening PDF documents in Adobe Acrobat Professional](#)



Saving documents in FileSphere

- ▶ Click the FileSphere **Save** button or use the document application's regular Save function.
 - ▶ Providing your document is a **FileSphere** document and it has been opened from FileSphere, when you select Save, the document will be saved in **FileSphere** and a new minor version will be created, once the document is returned to its **Document Space**.
 - ▶ In some instances, the document will not be returned until you close the application.
-  If you select **Save As**, instead of **Save**, from the **FileSphere menu** you will create a duplicate document and changes you have made will not be made to the original document.



See also

[Working with document versions](#)



Deleting documents in FileSphere

- ▶ Select the document(s) you want to delete in their **Document Space**.
 - ▶ Press the keyboard **Delete** button
- or
- ▶ Right click on the highlighted document(s) and select **Shred** from the menu.
- ▶ A **FileSphere** confirmation dialog box will be displayed requesting you to confirm the deletion.
- ▶ Click **Yes**
- ▶ The selected documents will be deleted from their **Document Space** and transferred to the **Shredder**.



When documents are deleted, they still retain their classification, which means you can easily retrieve and restore them, including their classification, from the *Shredder*



See also

- [Shredder](#)
- [Restoring deleted documents](#)
- [Permanently deleting documents](#)



Restoring from Shredder



Shredder

To restore one or more documents

- ▶ In the **Shredder**, highlight the documents you want to restore.



If there are many documents in the **Shredder**, you can use the [Retrieval Bar](#) or the [View By](#) function to help you locate the documents you want to restore.

- ▶ Right click on the highlighted documents and select **Restore** from the menu.
A confirmation dialog box will be displayed requesting you to confirm the number of documents being restored.
- ▶ Click **Yes** to restore the documents.

To restore all documents

- ▶ Right click on the **Shredder** icon and select **Restore All**
A confirmation dialog box will be displayed requesting you to confirm the restore.
- ▶ Click **Yes** to continue.



Restored documents have the same properties as they had when they were deleted. When you select the [View By](#) option they will appear in the same **View Folders** as they did prior to deletion.



Documents that have been deleted from the **Shredder** cannot be restored.



See also

[Shredder](#)

[Deleting documents from Shredder](#)



Deleting files from the Shredder



Shredder

To delete one or more documents

- ▶ In the **Shredder**, highlight the documents you want to permanently delete.



If there are many documents in the shredder, you can use the [Retrieval Bar](#) or the [View By](#) function to help you locate the documents you want to delete.

- ▶ Right click on the highlighted documents and select **Remove**
A confirmation dialog box will be displayed requesting you to confirm the number of documents being deleted.
- ▶ Click **Yes** to delete the documents.

To delete all documents

- ▶ Right click on the **Shredder** icon and select **Empty Shredder**
A confirmation dialog box will be displayed requesting you to confirm the deletions.
- ▶ Click **Yes** to continue.



Documents that have been deleted from the **Shredder** cannot be restored.



See also

[Shredder](#)

[Restoring documents from Shredder](#)



Working with Microsoft Office documents

When working with **Microsoft Office** application documents, you can access FileSphere functionality from within these applications using the **FileSphere toolbar** or the options on the **FileSphere menu**.



How to

[Add/ create new documents](#)

[Classify documents](#)






[Open documents](#)

[Save documents](#)

[Finalize documents](#)



Opening FileSphere documents in MS Office applications

- ▶ In your **Microsoft Office** Application, select **Open** from the **FileSphere menu** or use the **Open** button on the **FileSphere toolbar**.
- ▶ The **Open** dialog box is displayed, which allows you to browse and locate a document. It remembers the **Document Space** and **View Folder** hierarchy from the last time you saved a document.
- ▶ Select one of the following **FileSphere** spaces, from the spaces panel on the left side of the dialog box:
 -  Click to display all available spaces
 -  Contains documents you have already open or checked out.
 -  This is your local **Document Space**. Once you have selected the **Document Space** you can use the [Retrieval bar](#) or **View By** to create **View Folders** to help you locate documents.
 -  If you still prefer to search for documents, you can use **Search** to look through your own **Document Space** or any **Document Spaces** to which you have linked
 -  If you want to locate a document that you have deleted (sent to the **Shredder**) select the **Shredder**. Once you have selected the **Shredder** you can use the **Retrieval bar** or **View By** to create **View Folders** to help you locate documents.
You can right click on a document in the **Shredder** and select **Restore** to return the document to the **Document Space**.
- ▶ Once you have located a document, double click on it or click the **Open** button.
- ▶ The latest version of the selected document is opened
- ▶ The document is marked as **Checked out** in the **Document Space** from which it originated
- ▶ A link to the document is displayed in **My Workspace**
- ▶ When you save the document, because it is already registered with FileSphere its updates will be automatically saved in FileSphere.
- ▶ Once you close the document, the document will be returned from **My Workspace** to the originating **Document Space** and its status will be set to checked in.



See also

[Opening PDF documents in Adobe Acrobat Professional](#)
[Opening documents from Windows Explorer to edit or view](#)



Saving FileSphere documents in MS Office applications

Supported Microsoft Office applications, which include; **Microsoft Excel**, **Microsoft PowerPoint**, **Microsoft Project**, **Microsoft Visio** and **Microsoft Word**, allow you to save **FileSphere** and non FileSphere documents in **FileSphere**, without leaving the document application, using the options provided on the **FileSphere menu** or the **FileSphere toolbar**

To save a FileSphere document

- ▶ Click **Save** on the **FileSphere toolbar** or select **Save** from the **FileSphere menu** or you can also click the application Save button, providing you have opened the document from FileSphere.

To save a non FileSphere document in FileSphere

- ▶ Click **Save** on the FileSphere toolbar or select Save from the FileSphere menu.
- ▶ The **Save As** dialog box is displayed
- ▶ Select a **Document Space**: - click the **FileSphere** icon on the left side to display available **Document Spaces**.
 - ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
Optional - to classify in addition to automatic classification
 - ▶ Enter values against properties (see [How to classify using document property settings](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View/ Ghost Folders](#))
- ▶ Type in a **File name** for the document (or accept the default shown) and click the Save button
- ▶ Click **OK** to confirm that the document will be closed and re-opened in order to save it.
- ▶ The document will be saved in the selected **Document Space** with a status of **checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the document, it will be returned, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **checked in**.

To save a copy of a document in FileSphere

- ▶ Select Save As from the FileSphere menu
- ▶ The Save As dialog box is displayed
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
Optional - to classify in addition to automatic classification
 - ▶ Enter values against properties (see [How to classify using document property settings](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View/ Ghost Folders](#))
- ▶ Type in a **File name** for the document (or accept the default shown) and click the **Save** button
- ▶ Click **OK** to confirm that the document will be closed and re-opened in order to save it.
- ▶ The document will be saved in the selected **Document Space** with a status of **Checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the document, it will be returned, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **checked in**.



See also

[Saving FileSphere documents in Windows Explorer](#)



Working in Adobe Acrobat Professional

When working in **Adobe Acrobat Professional**, you can access FileSphere functionality using the application's [FileSphere toolbar](#) or [FileSphere menu](#).



How to

[Add/ create new PDF documents](#)






[Open PDF documents](#)

[Save PDF documents](#)

[Finalize PDF documents](#)



Opening FileSphere PDF files in Adobe Acrobat Professional

- ▶ In **Adobe Acrobat Professional**, click the **Open** button on the **FileSphere toolbar**.
- ▶ The **Open** dialog box is displayed, which allows you to browse and locate a PDF document. It remembers the space and **View Folder** hierarchy from the last time you saved a document.
- ▶ Select one of the following **FileSphere** spaces, from the spaces panel on the left side of the dialog box:
 -  Click the **FileSphere** icon to view all available **Document Spaces**
 -  **My Workspace** contains documents you have already checked out or those that you have previously opened from your **In Tray**
 -  **In Tray** contains documents sent to you by other FileSphere users.
 -  This is your local **Document Space**. If you have links to central/network **Document Spaces** you will need to click on the **FileSphere** icon to view them.
 -  If you still prefer to search for documents, you can use **Search** to look through your local **Document Space** or central/network **Document Spaces** to which you have links.
- ▶ Once you have selected a space you can use the **Retrieval bar** or **View By** to create **View Folders** to help you locate PDF documents.
- ▶ Once you have located a PDF document, double click on it or click the **Open** button.
- ▶ The latest version of the selected PDF document is opened
- ▶ The PDF document is marked as **Checked out** in the **Document Space** from which it originated
- ▶ A link to the PDF document is displayed in **My Workspace**
- ▶ When you save the PDF document, because it is already registered with FileSphere its updates will be automatically saved in FileSphere.
- ▶ Once you close the PDF document, it will be returned from **My Workspace** to the originating **Document Space** and its status will be set to **checked in**.



See also

- [Opening documents from Windows Explorer to edit or view only](#)
- [Opening documents in Microsoft Office](#)



Saving FileSphere PDF documents in Adobe Acrobat Professional

Adobe Acrobat Professional allows you to save FileSphere and non FileSphere PDF documents in FileSphere, without leaving the application, using the options provided on the **FileSphere toolbar** or the **FileSphere menu**.

To save a FileSphere PDF document

- ▶ Click **Save** on the **FileSphere toolbar** or providing you have opened the PDF document from FileSphere, you can also click the application **Save** button.

To save a non FileSphere PDF document in FileSphere

- ▶ Click **Save** on the **FileSphere toolbar** or select **Save** from the **FileSphere menu**.
- ▶ The **Save As** dialog box is displayed
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ▶ Once you have selected a **Document Space**, the properties available for classification are displayed.
 - Optional - to classify in addition to automatic classification**
 - ▶ Enter *values* against *properties* (see [How to classify using document property settings](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the PDF document and open the lowest level folder (see [Classification using View/ Ghost Folders](#))



FileSphere supports XMP, Adobe's Extensible Metadata Platform.

- ▶ Type in a File name for the PDF document (or accept the default shown) and click the Save button
- ▶ Click OK to confirm that the PDF document will be closed and re-opened in order to save it.
- ▶ The PDF document will be saved in the selected **Document Space** with a status of **checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the PDF document, it will be returned, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **checked in**.

To save a copy of a PDF document in FileSphere

- ▶ Click the Save As button on the FileSphere toolbar
- ▶ The Save As dialog box is displayed
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ▶ Once you have selected a **Document Space**, the *properties* available for classification are displayed.
 - Optional - to classify in addition to automatic classification**
 - ▶ Enter *values* against *properties* (see [How to classify using document property settings](#))
 - or
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the PDF document and open the lowest level folder (see [Classification using View/ Ghost Folders](#))
- ▶ Type in a **File** name for the PDF document (or accept the default shown) and click the **Save** button
- ▶ Click **OK** to confirm that the PDF document will be closed and re-opened in order to save it.
- ▶ The PDF document will be saved in the selected **Document Space** with a status of **Checked out**
- ▶ A link to it will be displayed in **My Workspace**
- ▶ Once you close the PDF document, it will be returned, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **checked in**.



See also

[Saving FileSphere documents in Windows Explorer](#)



Working with document versions

A new minor version (0.1, 0.2, 0.3, etc.) is created each time an edited document is **Returned** to its **Document Space**. While the document remains in **My Workspace**, you will not see any change in the version number even though you have edited the document.

Previous versions are opened as **read only** and any changes made must be saved as a new document.

A new major version (1.0, 2.0, 3.0, etc.) is created each time a document is **Finalized** (published). This major version of the document remains as a **read only** version and any changes you make to it will be saved under the next minor version number.

Access to previous versions is via the document menu or the **Versions** tab in the document's **Properties** dialog box.



How to

[Open current version](#)

[Edit / Save current version](#)

[Open previous versions](#)

[Edit / Save from a previous version](#)

[Remove versions](#)

[Finalize documents](#)

[Cancel Finalization](#)



Opening current document version

- ▶ Select a document in the **Document Space** and double click on it **or** right click on the document and select **Open**
- ◀ The latest version will be opened.



If you open the document by selecting **Versions** from the document menu and then selecting the most recent version, the document will be considered to be a previous version and will be opened in **read only** mode.



See also

- [Opening previous versions](#)
- [Editing and saving current version](#)
- [Editing and saving from previous versions](#)
- [Removing versions](#)
- [Finalizing versions](#)
- [Cancelling finalized versions](#)



Editing / saving current document version

- ▶ Edit and **Save** the document as you would normally.
- ◀ Documents opened from **FileSphere** are automatically saved in **FileSphere** when you use the **Microsoft Office** application's **Save** function or **Save** from the **FileSphere menu**.
- ◀ When you close the updated document, the document will be returned from **My Workspace** to its **document space** and its version number will be incremented by one minor version number. For example, if you opened the current version of document, which was version 0.3, after you edit and save it, the new current version will become 0.4.



See also

- [Opening current version](#)
- [Opening previous versions](#)
- [Removing versions](#)
- [Finalizing versions](#)
- [Cancelling finalized versions](#)



Opening previous document versions

- ▶ Select a document in the **document space** and right click to display the document menu.
- ▶ Select **Versions**, and then **Open**, which will show a list of available versions (if **Versions** is not displayed on the menu, only one version of the document exists).
- ◀ Versions are displayed in reverse chronological order and show **user**, and **date and time** details for when the version was created.
- ▶ You can select any previous version to open.
 - or**
 - ▶ In the **document space**, select the document, right click and select **Properties** **or** if the document is open in a supported **Microsoft Office** application, select **Properties** from the **FileSphere menu**.
 - ▶ Select the **Versions** tab.
 - ◀ A list of previous versions is displayed in reverse chronological order, showing for each version, **Version** number, **User**, **Date and time** details, when the version was **Created**, and a **Comment**.
 - ▶ Highlight the document version you wish to open. You can use the drop down list at the top left to select **Minor versions** or **Major versions** only. Or you can use the Shift and Alt keys to select groups or multiple individual versions.
 - ▶ Click the **Open** button.
- ◀ Previous versions are opened as **read only**. If you want to save any changes to a previous version you will need to [save it as a new document](#).



See also

- [Opening current version](#)
- [Editing and saving current version](#)
- [Editing and saving from previous versions](#)
- [Removing versions](#)
- [Finalizing versions](#)
- [Cancelling finalized versions](#)



Editing/saving document versions



When you edit a previous version of a document you will not be able to save it as the latest version of the current document. Previous versions are opened in **read only** format and to edit and save changes, you will need to **Save as** and save it with a new filename.

- ▶ Edit the document.
- ▶ Click the **Save** button on the [FileSphere toolbar](#) **or** select **Save** from the [FileSphere menu](#).
- ◀ The **Save As** dialog box is displayed.
- ▶ Select a **Document Space**: - click the FileSphere icon on the left side to display available **Document Spaces**.
- ◀ Once you have selected a **Document Space**, the properties available for classification are displayed.
 - Optional - to classify in addition to automatic classification**
 - ▶ Enter values against properties (see [How to classify using document property settings](#))
 - or**
 - ▶ Create a **View/ Ghost Folder** hierarchy for the classification you want to assign to the document and open the lowest level folder (see [Classification using View/ Ghost Folders](#))
- ▶ Type in a **File name** for the document (or accept the default shown) and click the **Save** button
- ◀ The document will be saved in the selected **Document Space** with a status of **Checked out**. The version of the document that you opened will be closed and **returned**.
- ◀ A link to the new document will be displayed in **My Workspace**
- ◀ Once you close the new document, it will be **returned**, which means the link will be removed from **My Workspace** and its status in the **Document Space** will change to **Checked In**.

The new document will be saved with the new name and as version 0.1. Any previous versions are removed, for example, if a document, xyz.doc, has versions 0.1, 0.2, 0.3, 0.4 and 0.5 and you edit and save version 0.3 as document abc.doc, then abc.doc will be version 0.1.



See also

- [Opening current version](#)
- [Opening previous versions](#)
- [Editing and saving current version](#)
- [Removing versions](#)
- [Finalizing versions](#)
- [Cancelling finalized versions](#)



Removing document versions

- ▶ In the **Document Space**, select the document and right click to display the document menu.
- ▶ Select **Versions** and then **Remove**.
- ▶ A list of document versions is displayed in reverse chronological order, showing **User**, and **Date and time** details for when the version was created, together with options for removing All minor versions and All previous versions.
- ▶ Select a *single version* to delete, **All minor versions** or **All previous versions**.
- or
 - ▶ In the **Document Space**, select the document, right click and select **Properties** or if the document is open in supported **Microsoft Office** application, select **Properties** from the **FileSphere menu**.
 - ▶ Select the **Versions** tab.
 - ▶ A list of previous versions is displayed in reverse chronological order, showing for each version, Version number, **User**, **Date and time** details, when the version was created and a **Comment**.
 - ▶ Highlight the document version(s) you wish to remove. You can use the drop down list at the top left to select **Minor versions** or **Major versions** only. Or you can use the Shift and Alt keys to select groups or multiple individual versions.
 - ▶ Click the **Remove** button.



When you delete a previous version of a document, it is not completely removed from FileSphere, it can still be archived or restored through **FileSphere Administration**.





See also

- [Opening current version](#)
- [Opening previous versions](#)
- [Editing and saving current version](#)
- [Editing and saving from previous versions](#)
- [Finalizing versions](#)
- [Cancelling finalized versions](#)



Finalizing documents

- ▶ In the **Document Space**, select the document, right click and select **Finalize**
or
if the document is open in supported **Microsoft Office** application, select **Finalize** from the **FileSphere menu** or click the **Finalize** button on the **FileSphere toolbar**.
or
if a PDF document is open in **Adobe Acrobat Professional**, click the **Finalize** button on the FileSphere toolbar.
- ▶ The **Finalize options** dialog box is displayed, in which you can *optionally*:
 - ◆ Insert a **Comment**
 - ◆ **Delete all minor versions** by selecting the **Remove minor versions after finalizing** checkbox
 - ◆ Set an **Expiry date** for the document by selecting the **Document must expire at:** checkbox.
 - ▶ **NA** indicates that no date is set.
 - ▶ Click on the down arrow to display the calendar and select an expiry date.
 - ▶ Use the arrows to change the month  or click on the year and use the arrows  to change the year.
 - ▶ Click on a day to select the date.
- ▶ Click the **Finalize** button.
- ▶ The document will be closed.
- ▶ A new **read only** major version of the document will be created.
- ▶ The document status will be updated to **Finalized** and the document details will be emphasised in blue.



See also

[Cancelling finalization](#)



Cancelling finalization

- ▶ Right click on the finalized document in the **Document Space** and select **Cancel Finalize** from the document menu.

The most recent major version numbering will be removed and the current version number will be restored to the last minor version that existed before the document was **finalized**.

The document status will be updated to **checked in** and the document details will be restored to black text.



See also

[Working with document versions](#)

[Finalizing documents](#)



Sending and sharing documents

[About sending and sharing documents](#)

[Sending documents to My Workspace](#)

[Returning documents from My Workspace](#)

[Sending documents to Favorites](#)

[Removing documents from Favorites](#)

[Sending documents by email](#)

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[Sending documents to a location](#)

[Returning documents from a location](#)



About sending and sharing documents



[My Workspace](#)

When you send a document to **My Workspace**, the documents is **checked out** so that only you can edit it.

If you open a document from **My Workspace** you will be given the option of keeping it in **My Workspace** when you close it. Closed documents in **My Workspace** can be **Returned** to **check** them back **in** to their **Document Space**



[Favorites](#)

Sending a document to **Favorites** provides a shortcut to the document. This is useful for documents that you access regularly; documents you are currently working with; or documents you use infrequently but want to be able to access them quickly.

When you no longer require the shortcut, you can **Remove** documents from **Favorites**.



[Email](#)

You can send FileSphere documents by email using **Send To** from the document menu or by using **Insert from FileSphere** from an **Outlook** message **FileSphere menu**. When you use **Send To** from the document menu and you are sending it to a FileSphere user, you have the option of **packaging** the document so that when it is received it is automatically added to the recipient's FileSphere **In Tray**.



[Location](#)

You can send a copy of a document to a specified location on your computer or network. If the document is checked out on sending, it can be edited whilst out of the FileSphere environment and then later **returned** from this location, and version control will be maintained



[How to](#)

[Send documents to My Workspace](#)

[Return documents from My Workspace](#)

[Send documents to Favorites](#)

[Send documents by email](#)

[Receive documents by email](#)

[Send documents to a location](#)

[Return documents from a location](#)



Sending documents to My Workspace

- ▶ In the **Document Space** select the document or documents you want to **check out**
- ▶ Right click on the documents, point to **Send To** and select **My Workspace** from the menu
- ◀ The documents will be displayed in **My Workspace** and document status will be changed to **checked out**.



See also

[Returning documents from My Workspace](#)

[My Workspace](#)

[About sending and sharing documents](#)



Returning documents from My Workspace

You can [Return](#) documents from **My Workspace** or alternatively, you can [Undo Checkout](#) from the **Document Space**.



If you [Undo Checkout](#) from the **Document Space** you will lose any changes that have been made to the document and you will leave a copy of the document in **My Workspace**, which cannot be returned; it can only be deleted or saved as a new document. Only returning the document returns it with any updates that have been made.



My Workspace

To return documents from My Workspace

- ▶ In **My Workspace** select the document or documents you want to return
- ▶ Right click and select [Return](#) from the menu

The documents will be removed from **My Workspace** and in their **Document Space** document status will be changed to **Checked In**.



Document Space

To undo checkout from a Document Space.

- ▶ In the **Document Space** select the document or documents you want to return from **My Workspace**
- ▶ Right click and select [Undo Checkout](#) from the menu

The documents will be removed from **My Workspace** and in the **Document Space** their document status will be changed to **Checked In**.



See also

[Sending documents to My Workspace](#)
[My Workspace](#)
[About sending and sharing documents](#)

-



Sending documents to Favorites

- ▶ In the **document** space, select the document or documents that you want to create shortcuts to
- ▶ Right click, point to **Send To** and then select **Favorites**.
- ▶ The documents will be displayed in **Favorites** as a shortcut. The document status will be remain unchanged in the **Document Space**, because you have only created a shortcut. You can open the document from **Favorites** and access the document Properties. The name of the document displayed in **Favorites** is a display name only. If you change its name, it will not be changed in the **Document Space**.



See also

- [Removing documents from Favorites](#)
- [Favorites](#)
- [About sending and sharing documents](#)

-



Removing documents from Favorites



Favorites

- ▶ In **Favorites** select the document or documents you want to remove
- ▶ Right click and select **Remove** from the menu
- ◀ The documents will be removed from **Favorites**. This will have no effect on the documents in the **Document Space**.



See also

[Sending documents to Favorites](#)
[Favorites](#)
[About sending and sharing documents](#)



Sending documents by email

- ▶ In the **Document Space** select the document or documents you want to send
- ▶ Right click and select **Send To** from the menu
- ▶ Select **Mail Recipient** from the menu.
- ▶ A new email message will be displayed with the document as an attachment.
- ▶ The **Subject** defaults to the document attachment filename, but you can change it if you wish
- ▶ Enter the email address for the recipient in **To...** and click **Send**.
- ▶ An **Alert** will be displayed to show the document has been sent



See also

- [Receiving documents by email](#)
- [About sending and sharing documents](#)



Receiving documents by email

FileSphere documents received by email will be displayed as email attachments in your **Microsoft Outlook** inbox. If you add an email message to FileSphere, the whole email including attachments is added. Alternatively, you can choose to add just the email attachments.

You can classify email messages and attachments as you add them.

- Use the **FileSphere options** within **Microsoft Outlook** to [add email messages and attachments](#)



See also

[Sending documents by email](#)

[About sending and sharing documents](#)



Sending documents to another location

- ▶ In the **Document Space** select the document or documents you want to send
- ▶ Right click and select **Send To** and then **Location**.
- ▶ Browse and select a destination folder and click **OK**.

If prompted:

- ▶ Choose whether to **check out** the document
A copy of the document will be placed in the selected location
- ◀ If the document has been sent to this location previously, FileSphere will prompt you to overwrite the existing document.
- ◀ A copy of the document will be placed in the selected location. Providing you do not move the document or rename it, you will be able to return the document after editing it and version control will be maintained.



See also

- [Returning a document from a location](#)
- [About sending and sharing documents](#)



Returning documents from a location

- ▶ In the non FileSphere location, right click on the document you want to return and select [Return to FileSphere](#)
- ◀ The document will be returned and will create a new version of the FileSphere document.
- ◀ Once a document is returned the [Return to FileSphere](#) option is no longer displayed on its right click menu and the document can be safely deleted from the location.



See also

[Sending documents to a location](#)

[About sending and sharing documents](#)



Migrating documents to FileSphere contents

[About migrating documents](#)

[Migrating documents from static to view folders](#)



About migrating documents

FileSphere has in built migration ability, which lets you copy your existing static folder hierarchy into FileSphere and then classify your documents as you move them out of the static folders. Once a static folder has been emptied, it can be removed from FileSphere.

You can choose to classify the contents of a static folder, including any sub folders, by assigning either a tag [value](#) or a [property](#) tag to them. When you assign a [property](#) tag to a folder, you are adding the folder name to a business schema as a [property](#).



Property tags are defined in schemas and before you begin the process of migration you should ensure that you have set up your common or business schema with the property tags that are appropriate for your classification needs.



Access to schemas is through the [FileSphere Administration console](#) (Refer to the [FileSphere Administrator Help](#) for further information [Windows Start menu > Programs > FileSphere Personal > Administration Help]).



How to

[Migrate documents](#)



See also

[About classifying documents](#)



Migrating documents to FileSphere

- ▶ Right click on one or more **Static Folders** in the **Document Space** right contents pane.



You can only view **Static Folders** when no **View By** property is selected.

- ▶ Select **Migrate** from the menu, then select one of the following options, explanations of which are given below:
 - ◆ [Assign Property Value](#)
 - ◆ [Assign Property Name](#)
 - ◆ [Remove Static Folder](#)

Assign Property Value

Assign Property Value displays a list of properties defined in the business schemas that are enabled

- ▶ Select a **property** from the menu.
 - ◀ The static folder name is assigned as a **value** to the selected **property** for all documents held in the static folder.

If for example, you have folders for each department within your company (<*Finance and Admin*>, <*Sales and Marketing*>, <*Warehouse*>, <*Operations*>, etc.), the folder names are **values** for the property of "Department." Providing you have the property, "Department" in an enabled schema you can assign the folder names as value tags for the property tag, named "Department". This would classify all documents in the <*Finance and Admin*> static folder with "Department = *Finance and Admin*" and all documents in the <*Sales and Marketing*> static folder with "Department = *Sales and Marketing*" and so on.

When you right click on the **Document Space** and select **Department** from the **View By** menu, **View Folders** will be displayed for *Finance and Admin*, *Sales and Marketing*, *Warehouse*, *Operations*, etc., which will contain your migrated and classified documents.
- ▶ You can choose to keep the folder or to remove it using the [Remove Static Folder](#) option. If you choose to remove the folder, it is advisable to do this only after you have completed classifying all documents the **Static Folder** or folder hierarchy.

Assign Property Name

Assign Property Name displays a list enabled business schemas

- ▶ Select a **Schema** from the menu
 - The static folder name is added as a property name to the selected schema and the name of any static sub folders is assigned as the value the property name. If there are no sub folders the value is assigned as "property name info" for all documents held in the static folder.

If for example you have a <*Client*> static folder, which contains folders for each of your clients (<*A B Brown*>, <*Abel Services Pty Ltd*>, <*Andersons Pty Ltd*>, etc.), the folder names are values of the parent folder "Client." This means the parent folder "Client" needs to become a property name with the client sub folder names as the values. This would classify all documents in the <*A B Brown*> static folder with "Client = *A B Brown*" and all documents in the <*Abel Services Pty Ltd*> static folder with "Client= *Abel Services Pty Ltd*" and so on. Any documents in the *Client* folder would be classified with "Client = *Client info*"

When you right click on the **Document Space** and select **Clients** from the **View By** menu, **Views** will be displayed for *A B Brown*, *Abel Services Pty Ltd*, *Andersons Pty Ltd* and *Client info*, etc., which will contain your migrated and classified documents.
- ▶ You can choose to keep the folder or to remove it using the [Remove Static Folder](#) option. If you choose to remove the folder, it is advisable to do this only after you have completed classifying all documents the **Static Folder** or folder hierarchy.

Remove Static Folder

Remove Static Folder removes the static folder and displays the sub folders and documents it contained in the **Document Space**.



See also

[About classifying documents](#)



How to...

[Create new View Folders](#)

[Classify using document Property settings](#)

[Use the Retrieval Bar](#)

[Check Out / Check In a document](#)

[Create and use document shortcuts](#)



How to create folders for classification

To create a new Folder

- 1 ► Select a **Document Space**
- 2 ► Click the **New Folder** button down arrow (▼)
- 3 ► Select the **property** from the menu that you want to create a folder for.
◀ A new **Ghost Folder** is displayed (New Property)
- 4 ► Rename the new **Ghost Folder** with the required **value**.

To create a hierarchy of Folders

- Double click on the new **Ghost Folder** with the required **value** it to open it
- Repeat steps 2-4 until you have created **Ghost Folders** with the required property values



Other How to...

[How to... Table of Contents](#)



How to classify using Property settings

You can access a document's Properties as follows:

- ◆ By selecting **Properties** from the document right click menu and then the **FileSphere** tab
- ◆ In **Microsoft Office** application **Save** and **Save As** dialog boxes
- ◆ By selecting **Properties** from the **FileSphere menu** when a **Microsoft Office** application document is open

1 ► Click in the **Value** column to the right of the **Property** name of the property you want to edit.

◀ A **value** entry box is displayed:

2 ► Press the keyboard down arrow to display a list of **values** for the **property**, scroll and select a **value**

or

► type in the first letter of a **value**, to reduce the number of **values** listed, scroll and select a **value**

or

► type in a **value**

► Repeat steps 1-2 until you have added the required classification.



You cannot use the tab key to move between value boxes, you must always click in the next value box using the mouse.

► Click the **OK/Save** button to save changes and close the dialog box.



Once you have added or changed a **property value** (tag), you will be able to **View by** that **property** in the **Document Space** and a **View Folder** corresponding to the **value** will be created containing all documents that have the same **value** for the selected **property**.



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How to use the Retrieval Bar

The **Retrieval bar** is located above the contents pane in the **Windows Explorer** view of FileSphere and **Microsoft Office** dialog boxes.



If you can't see the **Retrieval bar**, click the **Retrieval bar** button, which toggles the **Retrieval bar** on and off.

The **Retrieval bar** allows you to pinpoint documents by entering a selection of document tags (**property** and **value** pairs), which drill down to a particular **View Folder** in a **View Folder** hierarchy that you define. This provides a more direct method of retrieving documents because it removes the need to **View By**, select a **View Folder** and then **View By** again etc.

You don't need to remember the names of **properties** and **values** because as you type in the **Retrieval bar** it prompts you with lists of **properties** and **values** to aid you with your selections.

The **Retrieval Bar** has different modes for retrieving documents:

◆ **Retrieve using properties**

This is the basic mode that involves entering a **property** followed by a **value**, one or more times.

This method creates **View Folders** according to the **properties** and drills down through them according to the **values**, to help you locate a document.



You don't need to type in whole **properties** and **values** because the **Retrieval Bar** prompts you with lists when you press the down arrow key or type in the first letter of a **property** or **value**.

◆ **Free metadata retrieval**

Lets you type in any **property** or **value**.

If you type in a **property**, this is the same as selecting **View By** a property and **View Folders** are created to group documents with like values.

If you type in a **value**, FileSphere retrieves all documents that have that value anywhere in their metadata, i.e. against any property.



You can include a **free metadata value** search on the end of a retrieve using properties search by typing in the value after the last forward slash.

◆ **Retrieve using values**

This mode provides unrestricted access to all FileSphere metadata. It allows you to type in any letter and FileSphere will display all **values** and **properties** that begin with that letter or press the down arrow key and a list of all **properties** and **values** will be displayed, which indicates which are **values** and which are **properties**. If you select a **value**, FileSphere will prompt you with a list of available **properties** to select from. If you select a **property** FileSphere will prompt you with a list of available **values** to select from. You can repeat entering either **values** or **properties** first until you have located your document. This mode is designed for when you know little or nothing about the document you are searching for. It may take longer than using the **Using properties** mode because FileSphere has to analyse all classification for all documents.

Retrieve using properties

property=value/property=value/property=value/↵

1. ► Ensure the **Retrieve using values** button is not selected.
2. ► Click once in the **Retrieval bar**
3. ► Press the **down arrow key** to display a list of **properties** **or** type the first letter of a **property** to display a restricted list of **properties**.
4. ► Use the **arrow keys** (↓↑) to highlight a **property**
5. ► Type an equals sign (=)
A list of **values** for the selected **property** will be displayed
6. ► Use the **arrow keys** (↓↑) to highlight a **value**
You've now made your first **property=value** tag selection
7. ► Type a forward slash (/)
A list of **properties** will be displayed, which you can restrict by typing the first letter of a **property**
8. ► Use the **arrow keys** (↓↑) to highlight a **property**
9. ► Type an equals sign (=)



A list of **values** for the selected **property** will be displayed

10. ▶ Use the **arrow keys** (↓↑) to highlight a **value**
You've now made your second **property=value** tag selection

▶ Repeat steps 7-10 until you've entered **property=value** tags to identify your document.

To display documents only:

- ▶ Type a forward slash (/) and press the **Enter** key
- ◀ Documents in the lowest level **View Folder** in the **View Folder** hierarchy you have specified will be displayed. Any subsequent **View Folders** to which the documents belong will be collapsed.

OR

To display any further View Folders as well as documents:

- ▶ Press the **Enter** key
- ◀ **View Folders** and documents will be displayed in the lowest level **View Folder** in the **View Folder** hierarchy you have specified.

- ▶ If too many documents are displayed you can click back in the **Retrieval bar** (after the last forward slash) press the **down arrow key** (↓) and continue making **property=value** selections

Summary of property access

Do not press the **Enter** key until you have completed your selection of **properties** and **values**

A forward slash (/) prompts the **properties** list.

An equals sign (=) prompts the **values** list for the selected **property**.

Select **properties** and **values** using the **arrow keys** (↓↑) only

End your selection with a forward slash (/) to display only documents

Free metadata retrieval

value↵

- ▶ Click once in the **Retrieval bar**
- ▶ Type in a **value** and press the **Enter** key
All documents that have that **value** anywhere in their **properties** will be displayed



If too many documents are retrieved you can limit the selection by first typing in one or more **property= value/** pairs (see [Retrieve using properties mode](#)) and then typing in the **value**.

Retrieve using values

1. ▶ Click the **Retrieve using values** button on the right hand side of the **Retrieval bar**
2. ▶ Click once in the **Retrieval bar**
3. ▶ Type in all or part of a **property** or a **value**
A list of **values** and **properties**, that begin with what you have typed, will be displayed. **Values** are displayed as black text and **properties** (and the schema to which they belong) are displayed in blue text.
4. ▶ Use the **arrow keys** (↓↑) to highlight a **property** or a **value**
5. ▶ Type an equals sign (=)
If you selected a property, a list of available **values** will be displayed or if you selected a **value**, a list of available **properties** will be displayed.
6. ▶ Use the **arrow keys** (↓↑) to highlight a **value** or a **property**
You've now made your first **property=value** or **value=property** tag selection.
Note that FileSphere always displays the selection as **property=value**, regardless of whether you selected by **property** or a **value** first
7. ▶ Type a forward slash (/)
A list of **properties** will be displayed, which you can restrict by typing the first letter of a **property** or alternatively you can type in all or part of a **property** or a **value**.
A list of **values** and **properties**, that begin with what you have typed, will be displayed. **Values** are displayed as black text and **properties** (and the schema to which they belong) are displayed in blue text.



8. ▶ Use the **arrow keys** (↓↑) to highlight a **property** or a **value**
9. ▶ Type an equals sign (=)
If you selected a property, a list of available **values** will be displayed or if you selected a **value**, a list of available **properties** will be displayed.
10. ▶ Use the **arrow keys** (↓↑) to highlight a **value** or a **property**
You've now made your first **property=value** or **value=property** tag selection.
Note that FileSphere always displays the selection as **property=value**, regardless of whether you selected by **property** or a **value** first

▶ Repeat steps 7-10 until you've entered **property=value** tags to identify your document.

To display documents only:

- ▶ Type a forward slash (/) and press the **Enter** key
- ◀ Documents in the lowest level **View Folder** in the **View Folder** hierarchy you have specified will be displayed. Any subsequent **View Folders** to which the documents belong will be collapsed.

OR

To display any further **View Folders** as well as documents:

- ▶ Press the **Enter** key
- ◀ **View Folders** and documents will be displayed in the lowest level **View Folder** in the **View Folder** hierarchy you have specified.

- ▶ If too many documents are displayed you can click back in the **Retrieval bar** (after the last forward slash) press the **down arrow key** (↓) and continue making **property=value** selections

Summary of value access mode

Do not press the **Enter** key until you have completed your selection of **properties** and **values**

Typing in a letter or word prompts a list of both **properties** and **values**

A forward slash (/) prompts the **properties** list.

An equals sign (=) prompts the **values** list if a **property** is selected or the **properties** list if a **value** is selected.

Select **properties** and **values** using the **arrow keys** (↓↑) only

End your selection with a forward slash (/) to display only documents



If you wish to retrieve documents based on application specific properties, such as **XMP metadata** for **Adobe PDF** documents or **From**, **To**, **Cc**, **Date Received** for email messages, then it is advisable to make **Type** your first selection, e.g. enter **Type=Adobe PDF** or **Type=Outlook Message**.



Other How to...

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How to Check Out / Check In a document

When you open a document it is automatically **Checked Out** and a link to it is displayed in **My Workspace**. If you wish to reserve a document so that no one else is able to edit it, you can [Check Out](#) the document without opening it by sending it to **My Workspace**.

When you close a document, if it was opened from the **Document Space** it is automatically **Checked In** and its link is removed from **My Workspace**. If the document was opened from **My Workspace** FileSphere will ask you if you wish to **Return** it to the **Document Space** or leave it in **My Workspace**.

You can [Check In](#) documents and remove them from **My Workspace** by **Returning** them. This ensures that any changes that you have made to the document since it was **Checked Out** are saved as the latest version.

You can also **Check In** documents by undoing **Check Out** from the **Document Space**, however by doing this you will lose any changes made to the document since it was **Checked Out**.

To Check Out a document

- ▶ Select the document in the **Document Space** in the **Windows Explorer** view, right click and point to [Send To](#), then click on [My Workspace](#)
- ◀ The document will be automatically **Checked Out** and link placed in **My Workspace**
- ◀ You can open this document from **My Workspace**. If you attempt to open the document from the **Document Space** or another space such as **Favorites**, FileSphere will display a message and ask you if you wish to open the document from **My Workspace**.

To Check In or Return a document from My Workspace

- ▶ Select the document in the **My Workspace** in the **Windows Explorer** view, right click and click on [Return](#)
- ◀ The document will be automatically **Checked In** and its link removed from **My Workspace**.
- ◀ If for any reason FileSphere is not able to check the document back in, such as the **Check Out** has been [undone](#) from the **Document Space**, FileSphere will ask you if you wish to keep the document in **My Workspace** and save it as a new document or just remove the document from **My Workspace**.

To undo Check Out from the Document Space

- ▶ Select a document that is **Checked Out** in the **Document Space** in the **Windows Explorer** view, right click and click on [Undo Checkout](#)
- ◀ The document will be automatically **Checked In** and its link removed from **My Workspace**, whether the document is open or closed. If the document is open and you want to save changes made to it you will need to save it as a new document.



Other How to...

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How to create document shortcuts

You can create shortcuts to FileSphere documents, which are similar to Windows shortcuts, and save them in your file system / desktop.

To create a document shortcut

- ▶ In the **Windows Explorer** view, right click on a document, select **Create Shortcut** from the menu.
- ▶ A **Browse** dialog box is displayed.
- ▶ Select the location in which you want to save the shortcut and click **OK**.
- ▶ A shortcut icon will be added to the selected location. The shortcut file has an additional extension of .fslnk



Other How to...

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License details and support

[Viewing FileSphere license key expiry date](#)

[Registering/ renewing FileSphere license key](#)

[Contacting FileSphere](#)



Viewing FileSphere license expiry date

- ▶ Right click on the **FileSphere** icon and select **Properties** from the menu.
The **Properties** dialog is opened with the **General** tab selected. It shows the date on which your license key will expire and the number of days until this date.
- ▶ Click the **Cancel** button to close the window, or click the **Registration** button if you wish to register a new license key.



See also

[Registering/ renewing FileSphere license key](#)



Registering / renewing FileSphere license key

When you purchase FileSphere, you will be supplied with a FileSphere license key by email, which you will need to use to register your copy of FileSphere.



Keep a record of your license key in a safe place because you will need to use it if requesting support or upgrading.



FileSphere

To register FileSphere

- ▶ Right click on the **FileSphere** icon and select **Properties** from the menu.
The **Properties** dialog is opened with the **General** tab selected. It shows the date on which your license key or evaluation period will expire and the number of days until this date.
- ▶ Click the **Registration** button
- ▶ Select the Specify Product Key radio button
- ▶ Copy the license key from the email and paste it into the first product key box
- ▶ The license key numbers will be automatically distributed into the license key boxes
- ▶ Click the **Register** button
The **Properties** dialog is redisplayed showing the new date on which your license key will expire and the number of days until this date.
- ▶ Click the **OK** button to close the window and continue.



See also

[Viewing FileSphere license expiry date](#)



Contacting FileSphere

General enquiries

email: info@filesphere.com

Product feedback

email: feedback@filesphere.com

Sales and Distributor enquiries

email: sales@filesphere.com

Technical enquiries

email: techsupport@filesphere.com

Before contacting the FileSphere Team, please refer to FileSphere Help and [FAQs on the FileSphere website](#), for the latest information on FileSphere.



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