

# ADWR's InfoShare/DocuShare Training

Provided by:

Sharon S. Morris & Karen A. Fisher  
Arizona Department of Water Resources

# Outline

- Purpose
- Object Definitions
- Accounts/Login
- Content
- Working with Documents
- Demo

# Purpose

- A web-based content management system
- Provides a central location for data sharing and collaboration
- Allows for multi-user access
- Ability to quickly search for content
- Maintains a history of a document's versions

# Definitions



**User**—A registered DocuShare user.



**Group**—One or more DocuShare users, groups, or both.



**Collection**—A container for storing objects.



**Document**—A stored document. The icon can vary, depending on the document's file type.



**View in HTML** – Provides an alternative viewer for certain document types.



**Versioning** – Allows users to check in/out a document for editing. Maintains a viewable history of changes.



**Lock/Unlock** – Allows a user to temporarily disable a document's Versioning function.



**Comment** – An informal commentary about a document.



**Properties** – Allows a user to view an object's properties.



**Favorites** – Adds an object to a DocuShare user's My Favorites list.



**Notification**—Email notification after a change occurs to a specified object.



**More Actions** – A drop down menu of more actions for the user to choose from.



**URL**—An Internet address for a web page.



**Calendar**—An online monthly or weekly calendar.



**Event**—A calendar entry.



**Wiki**—A collaborative web site.



**Weblog**—A simple web site for frequent postings.



**Discussion**—An online forum where topics can be posted.



**Topic**—A posting to a discussion.

# Accounts/User Levels

- Public/Login not required
  - 👤 Guest – Read & download
- Accounts/Login required
  - 👤 User – Read, download & upload
  - 👤 Admin – Read, download, upload & delete

# Login

- DocuShare is available via that web at: <http://infoshare.azwater.gov>
- To access an account, right click the **Login** link under **My Links**

The screenshot shows a Windows Internet Explorer browser window displaying the ADWR DocuShare website. The address bar shows the URL <http://infoshare.azwater.gov/docushare/dsweb/HomePage>. The website header includes navigation tabs for About Us, Data Center, Divisions, Management/ Planning, Permits/ Reporting, Programs, and Water Resources. The main content area features a "Guest" user profile, a search bar, and several sections: "Collections" (ADWR Projects), "Other Links", "Communities" (Wikis, Weblogs), "What's New", and "Getting Started". The footer contains a "My Links" section with a red arrow pointing to the "Login (As a Different User)" link. The footer also includes "Home", "What's New", and "Help" links, and the ADWR logo.

DocuShare ADWR - Windows Internet Explorer

http://infoshare.azwater.gov/docushare/dsweb/HomePage

File Edit View Favorites Tools Help

Contribute Edit in Contribute Post to Blog

ADWR - Home Page DocuShare ADWR

About Us Data Center Divisions Management/ Planning Permits/ Reporting Programs Water Resources

Acting Director  
Sandra A. Fabritz-Whitney

ADWR  
Arizona Department of Water Resources

eGovernment

AZ.GOV  
Arizona's Official Web Site

Guest

Welcome! Guest

Collections  
Top level collections  
ADWR Projects  
ADWR Project Area

Other Links  
Links to other content

Communities  
Explore our community areas  
Wikis  
Weblogs  
more »

What's New  
Lists all modified content. See what's new today!  
in the last hour Go

Getting Started  
Not sure what to do? Take a Tutorial

Home What's New Help

Explore  
Home  
What's New  
Help

Related Links  
About ADWR/DocuShare  
Site Statistics  
Tutorials  
ADWR/DocuShare Downloads  
DocuShare.xerox.com

My Links  
Login (As a Different User)  
My ADWR/DocuShare  
My Tasks  
Account Settings (Guest)

History  
Home  
Login

Copyright © 2010 Arizona Department of Water Resources. All Rights Reserved.

ADWR

# Login

- Enter your ***Username*** and ***Password\****

Login

Location: [Home](#) » [Login](#)

## Login

→ Login using an existing account

Username

Password

Domain

Retain login for future

 **Note:** You must login to add content or see restricted content.

\*Contact Karen Henriksen (kahenriksen@azwater.gov) to request a login

# My DocuShare

**My DocuShare** is a personal workspace assigned to individual user accounts. It is customized to display a user's Personal Collections, Favorites, Groups, Tasks and Calendars.

## My DocuShare

Your DocuShare Personal Home Page

### ▼ Personal Collection

Show:

(Page 1 of 1)

Title	Owner	Edited	Size	Actions
 <a href="#">DocushareHowTo.docx</a> <small>NEW!</small> Basic instructions on how to use DocuShare	<a href="#">ssmorris</a>	01/07/11	683 KB	

### ▼ Site Home

View the top level contents.

(Page 1 of 1)

Type	Title	Owner	Edited	Size	Actions
	<a href="#">ADWR Projects</a> ADWR Project Area	<a href="#">admin</a>	11/17/10	1	  

### ▼ Favorite Calendars Combined

Show:

◀ January 2, 2011 - January 8, 2011 ▶

### ▼ Favorites

Show:

(Page 1 of 1)

-  [ADWR Projects](#)
-  [Committees](#)

### ▼ My Groups

View the groups you belong to.

(Page 1 of 1)

-  [WRDC Population](#)
-  [All Users and Guest](#)
-  [All Users Except Guest](#)
-  [All Users Except Read-Only](#)

### ▼ Tasks

View your current tasks.

(Page 1 of 1)

# Content

- Adding
- Viewing (object and its properties)
- Searching
- Editing
- Permissions
- Notifications
- Changing location
- Deleting (Admin. Only)

# Adding Content

1. Within a Collection, use the **Add...** drop down list to choose the item that you want to add to that Collection

Location: [Home](#) » [ADWR Projects](#) » [WRDC Listing](#)



## WRDC

Water Resource Development Commission

The Arizona Legislature this last session passed H.B.2661, which created the Water Resources Development Commission for the purpose of assessing the current and future water needs of Arizona. The Legislature tasked the Director of the Arizona Department of Water Resources to appoint a Water Resources Development commission, whose members must possess knowledge about various water resource and water management issues in Arizona and represent a regional and geographic cross-section of the state. Director Herb Guenther serves as the Chairman.

Properties

Add to Favorites



Edit Selected... <input type="button" value="Go"/>		Add... <input type="button" value="Go"/>	Refresh			
<input type="checkbox"/>	Type Title		Owner	Edited	Size	Actions
<input type="checkbox"/>	<b>Committees</b> WRDC Committ	Add... Calendar Collection Discussion <b>Document</b> URL Weblog Wiki	admin	12/01/10	6	
<input type="checkbox"/>	<b>Guidelines and</b> Guidelines and		admin	12/03/10	0	
<input type="checkbox"/>	<b>Meetings</b> Meeting agendas, notes, handouts, and presentations for WRDC meetings		admin	12/13/10	5	
<input type="checkbox"/>	<b>WRDC Blog</b> Water Resource Development Commission Weblog		admin	12/30/10	0	
<input type="checkbox"/>	<b>WRDC Calendar</b> Meeting calendar for all of WRDC meetings		admin	11/30/10	6	
<input type="checkbox"/>	<b>WRDC How To Use DocuShare</b> How to tips for using this docushare site		admin	12/01/10	2	
<input type="checkbox"/>	<b>WRDC Members</b> WRDC roster of members as of 10/12/2010		admin	12/03/10	0	
<input type="checkbox"/>	<b>WRDC Mission.pdf</b> Overview of the mission of WRDC		admin	12/03/10	84 KB	
<input type="checkbox"/>	<b>WRDC Workplan.pdf</b> Workplan for the WRDC		admin	12/03/10	137 KB	

# Adding Content

2. Complete the **Add** dialogue box, begin by using **Browse...** to upload your file

Location: [Home](#) » [Personal Collection for ssmorris Listing](#) » [Personal Collection for ssmorris Add](#)

## Add Document

**Add Document By:**  Uploading a document now  
 Scanning a document using a cover sheet  
 Uploading a document later

**Filename:** (required) C:\Documents and Settings\ssmorris\ Browse... 

**Title:** (required) DocushareHowTo.docx Update with filename 

**Summary:** Brief overview on how to use DocuShare 

**Description:**   
wysiwyg

**Keywords:** training, login, accounts, InfoShare 

**Expiration Date:** mm/dd/yyyy 

**Max Versions:** (required) 4 

**Author:** Sharon Morris 

**Initial Permissions:**  Same as container  
 Same as container except write restricted to owner  
 Restricted to owner

**Document Routing:**  Do not route the document  
 Route the document and publish it later  
 Publish and then route the document



# Viewing Content

## Click hyperlink

Guest Login

Location: [Home](#) » [ADWR Projects](#) » [WRDC](#) » [Committees Listing](#)

 **Committees**  
WRDC Committees

Type	Title
	<a href="#">Environmental</a> Environmental Committee for WRDC
	<a href="#">Finance</a> Finance Committee for WRDC
	<a href="#">Population</a> Population Committee for WRDC
	<a href="#">Report</a> WRDC Report
	<a href="#">Water Supply / Demand</a> Water Supply and Demand Committee for WRDC
	<a href="#">WRDC Staffing.pdf</a> ← WRDC Committee Staff

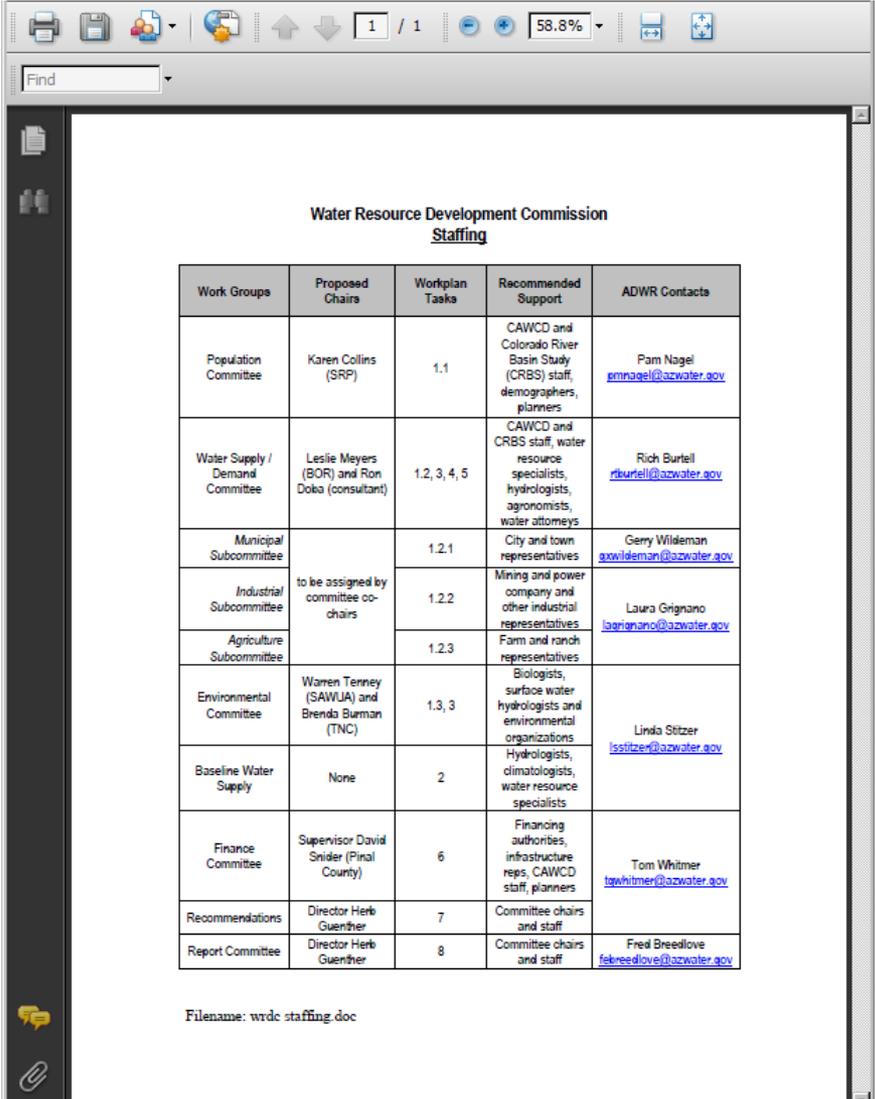
**Explore**      **Related Links**      **My Links**

[Home](#)      [About ADWR/DocuShare](#)      [Login \(As a Different User\)](#)  
[What's New](#)      [Site Statistics](#)      [My ADWR/DocuShare](#)  
[Help](#)      [Tutorials](#)      [My Tasks](#)  
[ADWR/DocuShare Downloads](#)      [Account Settings \(Guest\)](#)  
[DocuShare.xerox.com](#)

Copyright © 2010 Arizona Department of Water Resources. All Rights Reserved.

<http://infoshare.azwater.gov/docushare/dsweb/Get/Document-175/WRDC%20Staffing.pdf>

## Opens document in appropriate software



**Water Resource Development Commission Staffing**

Work Groups	Proposed Chairs	Workplan Tasks	Recommended Support	ADWR Contacts
Population Committee	Karen Collins (SRP)	1.1	CAWCD and Colorado River Basin Study (CRBS) staff, demographers, planners	Pam Nagel <a href="mailto:pnagel@azwater.gov">pnagel@azwater.gov</a>
Water Supply / Demand Committee	Leslie Meyers (BOR) and Ron Doka (consultant)	1.2, 3, 4, 5	CAWCD and CRBS staff, water resource specialists, hydrologists, agronomists, water attorneys	Rich Burtell <a href="mailto:rburtell@azwater.gov">rburtell@azwater.gov</a>
Municipal Subcommittee	to be assigned by committee co-chairs	1.2.1	City and town representatives	Gerry Wildeman <a href="mailto:gwildeman@azwater.gov">gwildeman@azwater.gov</a>
Industrial Subcommittee		1.2.2	Mining and power company and other industrial representatives	Laura Grignano <a href="mailto:lgrignano@azwater.gov">lgrignano@azwater.gov</a>
Agriculture Subcommittee		1.2.3	Farm and ranch representatives	
Environmental Committee	Warren Tenney (SAWUA) and Brenda Burman (TNC)	1.3, 3	Biologists, surface water hydrologists and environmental organizations	Linda Stitzer <a href="mailto:lstitzer@azwater.gov">lstitzer@azwater.gov</a>
Baseline Water Supply	None	2	Hydrologists, climatologists, water resource specialists	
Finance Committee	Supervisor David Snider (Final County)	6	Financing authorities, infrastructure reps, CAWCD staff, planners	Tom Whitmer <a href="mailto:twhitmer@azwater.gov">twhitmer@azwater.gov</a>
Recommendations	Director Herb Guenther	7	Committee chairs and staff	
Report Committee	Director Herb Guenther	8	Committee chairs and staff	Fred Breedlove <a href="mailto:fbreedlove@azwater.gov">fbreedlove@azwater.gov</a>

Filename: wrdc staffing.doc

# Searching Content

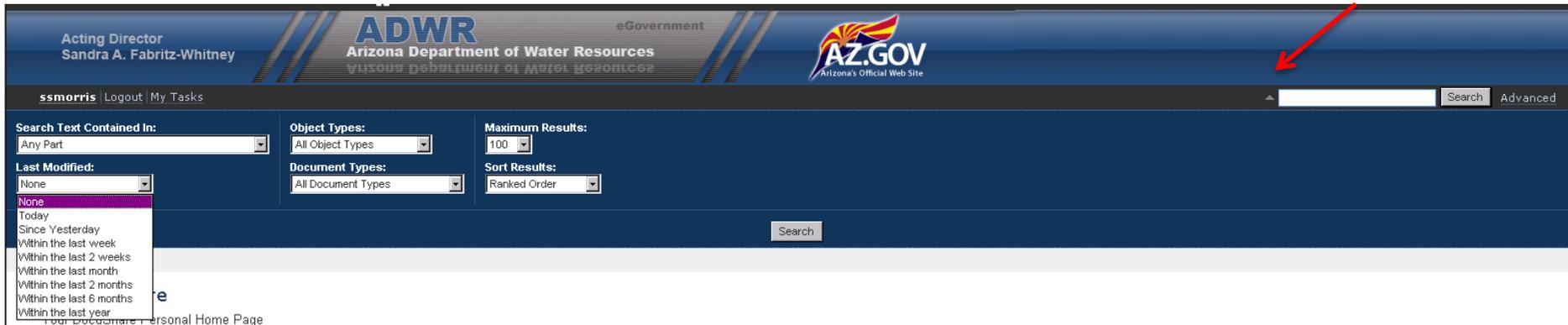
- Searches metadata & document content

1. Type in your search criteria and click **Search**



The screenshot shows the top navigation bar of the Arizona Department of Water Resources (ADWR) website. On the left, it identifies the Acting Director as Sandra A. Fabritz-Whitney. The center features the ADWR logo and the text "Arizona Department of Water Resources". On the right, there is the "AZ.GOV" logo and "Arizona's Official Web Site". Below the navigation bar, a search bar contains the text "population" and a "Search" button. A red arrow points to the search bar. Below the search bar, there are sections for "Collections" (with a link to "ADWR Projects"), "Other Links", and "Communities" (with links to "Wikis" and "Weblogs").

\*View additional search options by clicking the **More Actions** ▼ arrow



The screenshot shows the search interface of the ADWR website. The top navigation bar is identical to the previous screenshot. Below it, there is a search bar with a dropdown arrow on the right. A red arrow points to this dropdown arrow. Below the search bar, there are several search filters: "Search Text Contained In:" (set to "Any Part"), "Object Types:" (set to "All Object Types"), "Maximum Results:" (set to "100"), "Last Modified:" (set to "None"), "Document Types:" (set to "All Document Types"), and "Sort Results:" (set to "Ranked Order"). A "Search" button is located below these filters. A dropdown menu is open under "Last Modified:", showing options: "None", "Today", "Since Yesterday", "Within the last week", "Within the last 2 weeks", "Within the last month", "Within the last 2 months", "Within the last 6 months", and "Within the last year".

# Searching Content

## 2. Search Results appear

### Search Results

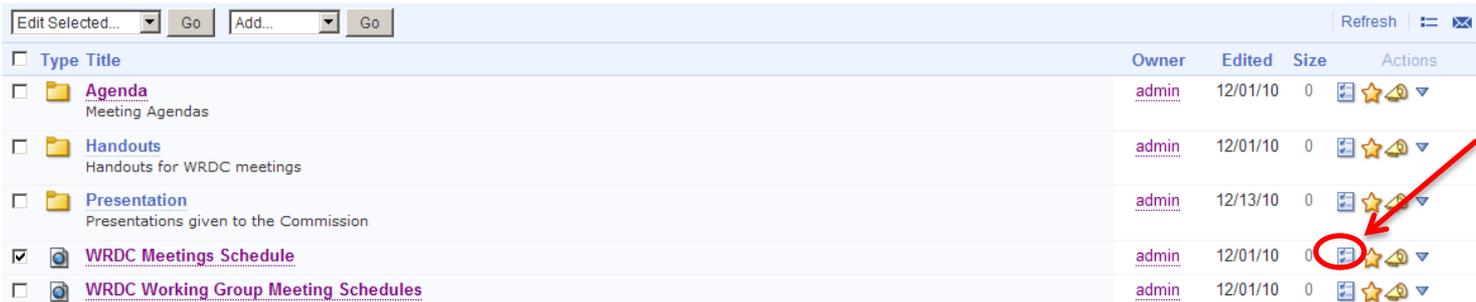
There were 22 matches found.

[Refine Search](#) | [Query Details](#) ▼

Type	Title	Owner	Edited	Size	Actions
	<a href="#">WRDCWSDAgenda01102011.doc</a> *NEW Agenda for the Water Supply/Demand meeting on 1/11/2011 <b>Appears In:</b> <a href="#">Agenda</a> <b>Content Snippet:</b> JANICE K. BREWER Governor HERBE.... JANICE K. BREWER Governor HERBERT R. GUENTHER Director ARIZONA DEPARTMENT OF WATER RESOURCES Water Resources Development Commission (HB 2661) Water Supply & Demand Working Group Public Meeting Notice Date...	<a href="#">wsd1</a>	01/10/11 09:07 AM	49 KB	   ▼
	<a href="#">Scripts</a> Scripts used for Population Committee's GIS analysis <b>Appears In:</b> <a href="#">GIS</a>	<a href="#">admin</a>	01/07/11 03:00 PM	0	 ▼
	<a href="#">WRDC Staffing.pdf</a> WRDC Committee Staff <b>Appears In:</b> <a href="#">Committees</a> <b>Content Snippet:</b> Filename: wrdc staffing.doc Water Resource Develop.... Filename: wrdc staffing.doc Water Resource Development Commission Staffing Work Groups Proposed Chairs Workplan Tasks Recommended Support ADWR Contacts <b>Population</b> Committee Karen...	<a href="#">admin</a>	12/01/10 10:07 AM	99 KB	   ▼
	<a href="#">WRDC_PopulationCommittee_Report_Final12-10-10.ppt</a> An overview of the Population Committee's work process <b>Appears In:</b> <a href="#">Presentation</a> <b>Content Snippet:</b> The CCD name is often the same as that of the largest <b>population</b> center within the CCD. Places include incorporated cities and towns and CDPs, which are unincorporated <b>population</b> centers identified by local officials using Cen...	<a href="#">ssmorris</a>	01/05/11 01:43 PM	4 MB	   ▼
	<a href="#">Population Committee Discussion</a> Informal discussion site for Committee members <b>Appears In:</b> <a href="#">Population</a>	<a href="#">admin</a>	12/03/10 03:27 PM	0	 ▼

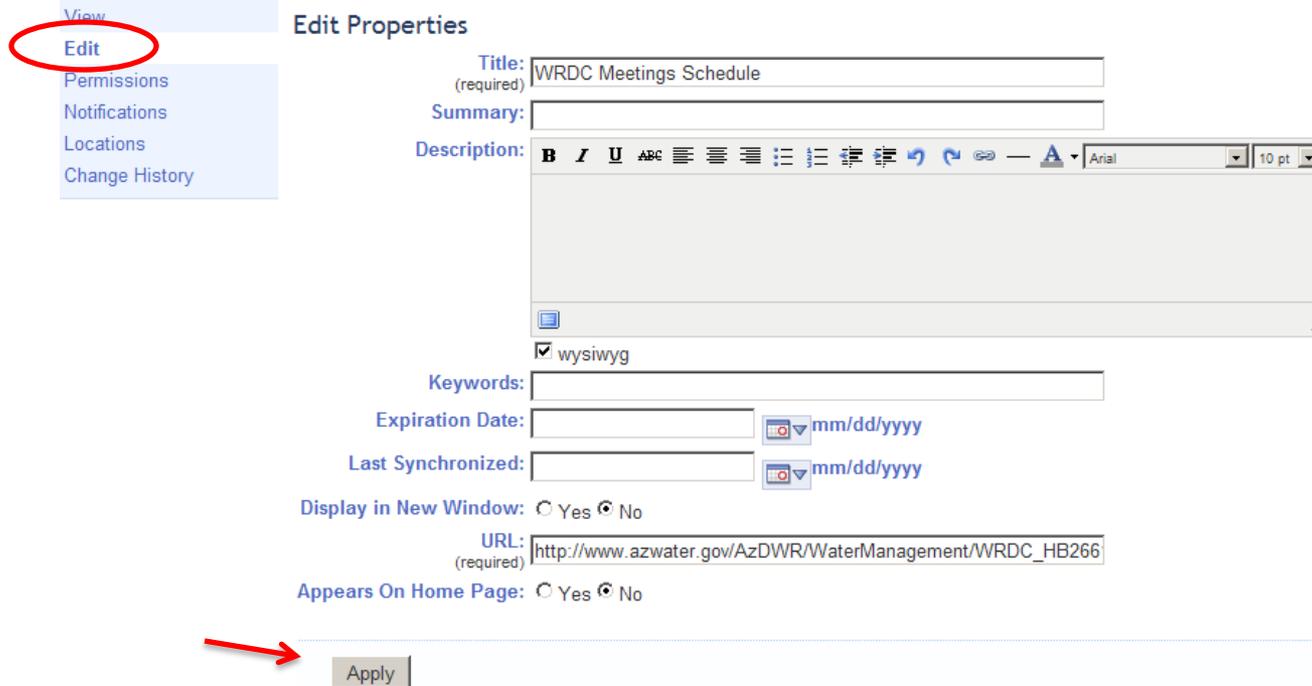
# Editing Properties

1. Click the object's **Properties** icon



Type	Title	Owner	Edited	Size	Actions
<input type="checkbox"/>	<b>Agenda</b> Meeting Agendas	admin	12/01/10	0	
<input type="checkbox"/>	<b>Handouts</b> Handouts for WRDC meetings	admin	12/01/10	0	
<input type="checkbox"/>	<b>Presentation</b> Presentations given to the Commission	admin	12/13/10	0	
<input checked="" type="checkbox"/>	<b>WRDC Meetings Schedule</b>	admin	12/01/10	0	
<input type="checkbox"/>	<b>WRDC Working Group Meeting Schedules</b>	admin	12/01/10	0	

2. Select **Edit** from the left menu and complete the dialogue box then click **Apply**



**Edit Properties**

**Title:** (required) WRDC Meetings Schedule

**Summary:**

**Description:**

**Keywords:**

**Expiration Date:** mm/dd/yyyy

**Last Synchronized:** mm/dd/yyyy

**Display in New Window:**  Yes  No

**URL:** (required) http://www.azwater.gov/AzDWR/WaterManagement/WRDC\_HB266

**Appears On Home Page:**  Yes  No

**Apply**

# Permissions

- ✔ **Reader:** allows the user or group to **read** the content of the object and **view** its associated properties and permissions
- ✔ **Writer:** allows the user or group to **change** the object's properties and **add** new objects, including new versions of documents
- ✔ **Manager:** allows the user or group to **delete** the object, and **change** the object's permissions and owner.

# Permissions

1.

Click on the object's **Properties** icon



2.

Select **Permissions** in the left menu, change user permission then click **Apply**



## Permissions

Title: WRDCWSDAgenda01102011.doc

Owner: WRDC Water Supply/Demand Committee (User-64, wsd1:DocuShare)<sup>DS</sup> [Change Owner](#)

Search Available to:  Anyone  Access list only

Access List:	User/Group	Reader	Writer	Manager
	WRDC Water Supply/Demand Committee (wsd1) <sup>DS</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Content Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	All Users and Guest	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	All Users Except Read-Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Guest (Guest) <sup>Anonymous</sup>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Read-Only Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Site Administrator (admin) <sup>DS</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	WRDC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	WRDC_Commission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	WRDC Commission Administrator (commissionadmin) <sup>DS</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Change Access List](#)

Options: Apply all permissions to:

- This document and its versions
- This document only

[Apply](#)



# Notifications

- Add notification & create recipient list

## 1. Click on the object's **Notification** icon

Location: [Home](#) » [ADWR Projects](#) Listing

 **ADWR Projects**  
ADWR Project Area

 Properties  
 Add to Favorites  
▼

<input type="checkbox"/>	Type	Title	Owner	Edited	Size	Actions
<input type="checkbox"/>	Folder	<a href="#">WRDC</a> Water Resource Development Commission	<a href="#">admin</a>	12/02/10	9	   ▼

## 2. Select **Notifications** on the left menu and click the **Create a New Notification** link

View  
Edit  
Permissions  
**Notifications**  
Locations  
Scan Cover Sheet  
Change History

**Notifications**  
Set up and view notifications

 [Create a New Notification](#)

Title	Owner	Date	Actions
No current notifications.			

## 3. Click the **Show Advanced Options** link

View  
Edit  
Permissions  
**Notifications**  
Locations  
Scan Cover Sheet  
Change History

**Notifications**  
Set up and view notifications

 [Create a New Notification - Show Advanced Options](#)

A notification sends you an email message when content is added. Select when you want to be notified from the Period menu. To select additional options, click Show Advanced Options.

Period:  (required)

# Notifications

4.

- View
- Edit
- Permissions
- Notifications**
- Locations
- Scan Cover Sheet
- Change History

## Notifications

Set up and view notifications

 Create a New Notification - Hide Advanced Options

Events of Interest:  
(required)

- Any Change
- Something added**
- New Document Version added
- Something deleted
- Properties edited
- Permissions edited
- Change in ownership
- Location edited
- Document locked or checked out
- Document unlocked

Period:  
(required)

Include Recipient Activity:  
(required)  Yes  No

Notification Action:  
(required)

Script:

Script Data:

External Recipients:  

Sender:  
(required)  Admin  Owner

Notification Applies To:  
(required)

Initial Permissions:  Same as object  
 Same as object except write restricted to owner  
 Restricted to owner

Title

# Notifications

- Enable/disable notification

1. Click on the object's **Properties** icon



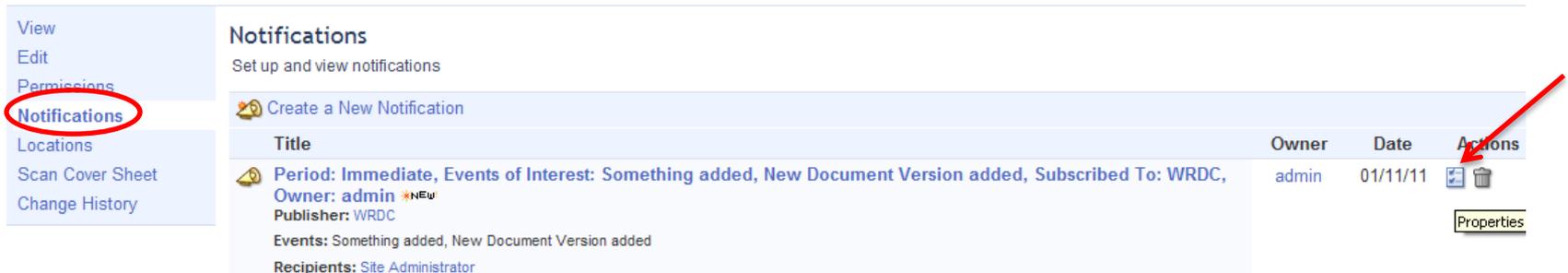
ADWR Projects  
ADWR Project Area

Edit Selected... Go Add... Go Refresh

Type	Title	Owner	Edited	Size	Actions
Folder	WRDC Water Resource Development Commission	admin	12/02/10	9	Properties Add to Favorites

Properties

2. Select **Notifications** from the left menu and click the **Properties** icon on the notification to be changed



View  
Edit  
Permissions  
**Notifications**  
Locations  
Scan Cover Sheet  
Change History

### Notifications

Set up and view notifications

Create a New Notification

Title	Owner	Date	Actions
Period: Immediate, Events of Interest: Something added, New Document Version added, Subscribed To: WRDC, Owner: admin <sup>NEW</sup> Publisher: WRDC Events: Something added, New Document Version added Recipients: Site Administrator	admin	01/11/11	Properties

Properties

# Notifications

## 3. Select **Edit** from the left menu and change the **Enabled** property to **Yes** or **No**

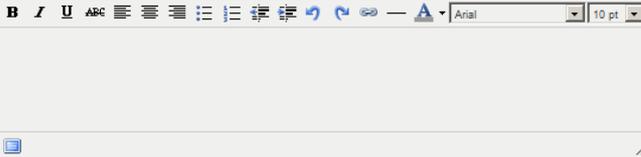
 Period: Immediate, Events of Interest: Something added, New Document Version added, Subscribed To: WRDC, Owner: admin  [Delete This Notification](#)

**Edit Properties**

[View](#)  
**Edit**  
[Permissions](#)  
[Recipients](#)  
[Change History](#)

**Title:** (required)

**Summary:**

**Description:** 

wysiwyg

**Keywords:**

**Expiration Date:**   mm/dd/yyyy

**Last Synchronized:**   mm/dd/yyyy

**Enabled:**  Yes  No

**Events of Interest:** (required)

**External Recipients:**

**Include Recipient Activity:** (required)  Yes  No

**Notification Action:** (required)

**Period:** (required)

**Script:**

**Script Data:**

**Sender:** (required)  Admin  Owner

**Notification Applies To:** (required)

# Changing location

Options:

1. Move an object using the ***Cut/Paste*** from the ***Edit Selected*** menu
2. Use the ***Copy/Paste*** or ***Locations*** property to create a reference to an object in several containers (similar to creating a shortcut)

# Changing location

Options:

1. Move using the ***Cut/Paste*** from the ***Edit Selected*** menu



Meetings

Meeting agendas, notes, handouts, and presentations for WRDC meetings

Properties

Add to Favorites



The screenshot shows a file management interface with a table of items. A context menu is open over the item 'WRDC Meetings Schedule'. The 'Cut' option is highlighted in blue, and a red arrow points to it from the left. The 'Cut' option is also circled in red. The table has columns for 'Owner', 'Edited', 'Size', and 'Actions'. The 'WRDC Meetings Schedule' row is highlighted in orange.

	Owner	Edited	Size	Actions
WRDC Meetings Schedule	admin	12/01/10	0	[Icons]
WRDC Working Group Meeting Schedules	admin	12/01/10	0	[Icons]

# Changing location

Options:

2. Create an object reference using **Copy/Paste** from the **Edit Selected** menu

## Meetings

Meeting agendas, notes, handouts, and presentations for WRDC meetings

Properties  
Add to Favorites

Edit Selected... Go Add... Go		Refresh	≡	✉
	Owner	Edited	Size	Actions
<input type="checkbox"/>	admin	12/01/10	0	
<input type="checkbox"/>	admin	12/01/10	0	
<input type="checkbox"/>	admin	12/13/10	0	
<input checked="" type="checkbox"/>	admin	12/01/10	0	
<input type="checkbox"/>	admin	12/01/10	0	

\*An object reference can also be created using the Locations property

# View Locations

Use the *Locations* property

View  
Edit  
Permissions  
Notifications  
**Locations**  
Change History

**Locations**

Current Locations: Meetings

Sort By: Title

Search: POPULATION

Possible Locations:

- Personal Collection for population1 (Collection-244)
- Personal Collection for populationadmin (Collection-292)
- Population (Collection-124)**

Selected Locations:

- Meetings (Collection-148)**

Add desired location into this box

# Deleting (Admin. Only)

1. Click the object's **More Actions** ▼ arrow and click **Delete Document**



2. Confirm delete by clicking the **Delete** button

## Confirm Delete



# Working with Documents

  Versioning

 Lock & unlock

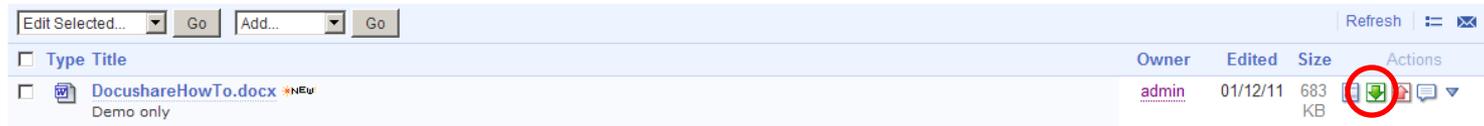
 Adding comments

# Versioning

- Check out and edit an existing document, and check in the revised document as a new version.  
- Ensures only one user at a time edits a document. 

# Versioning

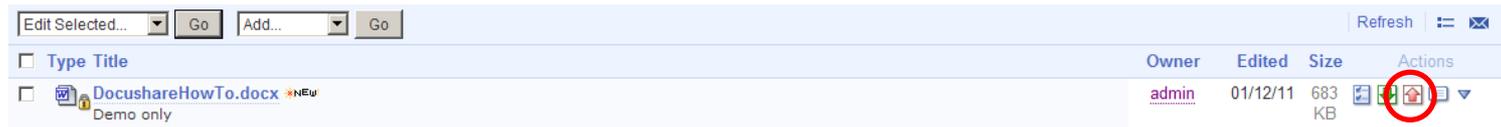
1. Click the document's **Check Out** icon



2. The document opens in its native editor\*, make your desired edits

3. Select **Save As** in the native editor to your local drive. Do not change the name of the document

4. Click the document's **Upload a New Version** icon

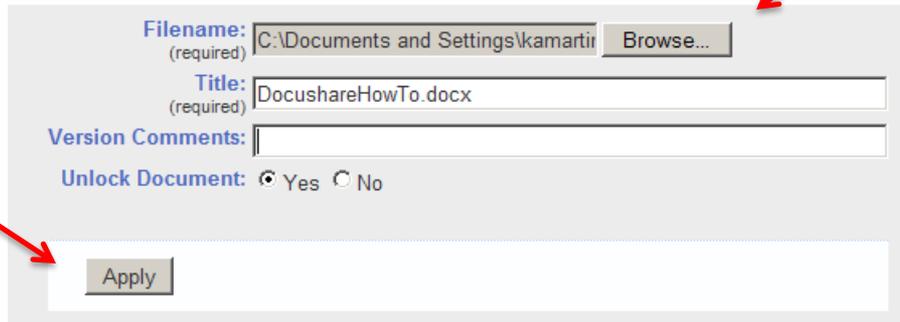


\*Items can only be edited with software that is compatible with the source item's file type

# Versioning

5. Complete the dialogue box by browsing to your locally saved file and click ***Apply***

Add Version



The screenshot shows a dialog box titled "Add Version" with the following fields and controls:

- Filename:** (required) C:\Documents and Settings\kamarti  (A red arrow points to this button.)
- Title:** (required) DocushareHowTo.docx
- Version Comments:** (empty text box)
- Unlock Document:**  Yes  No
- (A red arrow points to this button.)

# Viewing/Changing Versions

In the document's properties, view the **Version History**. All versions are listed here and available for viewing. Use the **Change Preferred Version** button to change the version.

DocushareHowTo.docx  
Version 2

Check Out  
Upload a New Version  
Delete Document

View  
Edit  
Permissions  
Notifications  
Locations  
**Version History**  
Comments (0)  
Scan Cover Sheet  
Routing  
Change History

### Version History

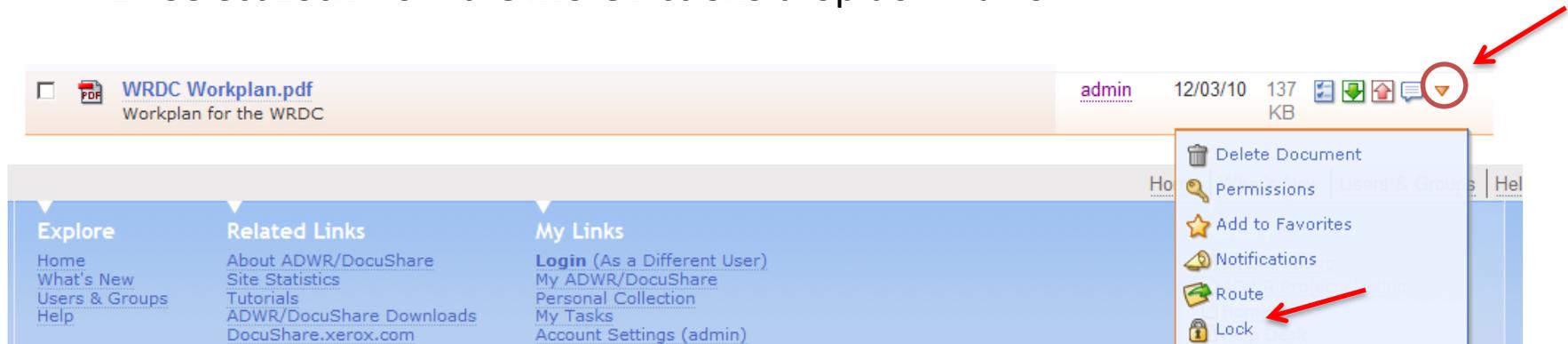
Preferred Type	#	Version	Owner	Created	Size
	2	DocushareHowTo.docx <i>No comment added</i>	admin	01/12/11 11:05 AM	699644
	1	DocushareHowTo.docx Initial Version	admin	01/12/11 10:51 AM	699809

Change Preferred Version    Show Renditions

# Lock & unlock

 Lock keeps other users from editing a document

1. Select **Lock** from the **More Actions** drop down arrow



The screenshot shows a document titled "WRDC Workplan.pdf" (137 KB) uploaded on 12/03/10 by user "admin". A red circle highlights the "More Actions" dropdown arrow in the top right corner. A red arrow points to this arrow. Below the document header, a blue navigation bar contains sections for "Explore", "Related Links", and "My Links". The "More Actions" dropdown menu is open, showing options: "Delete Document", "Permissions", "Add to Favorites", "Notifications", "Route", and "Lock". A red arrow points to the "Lock" option.

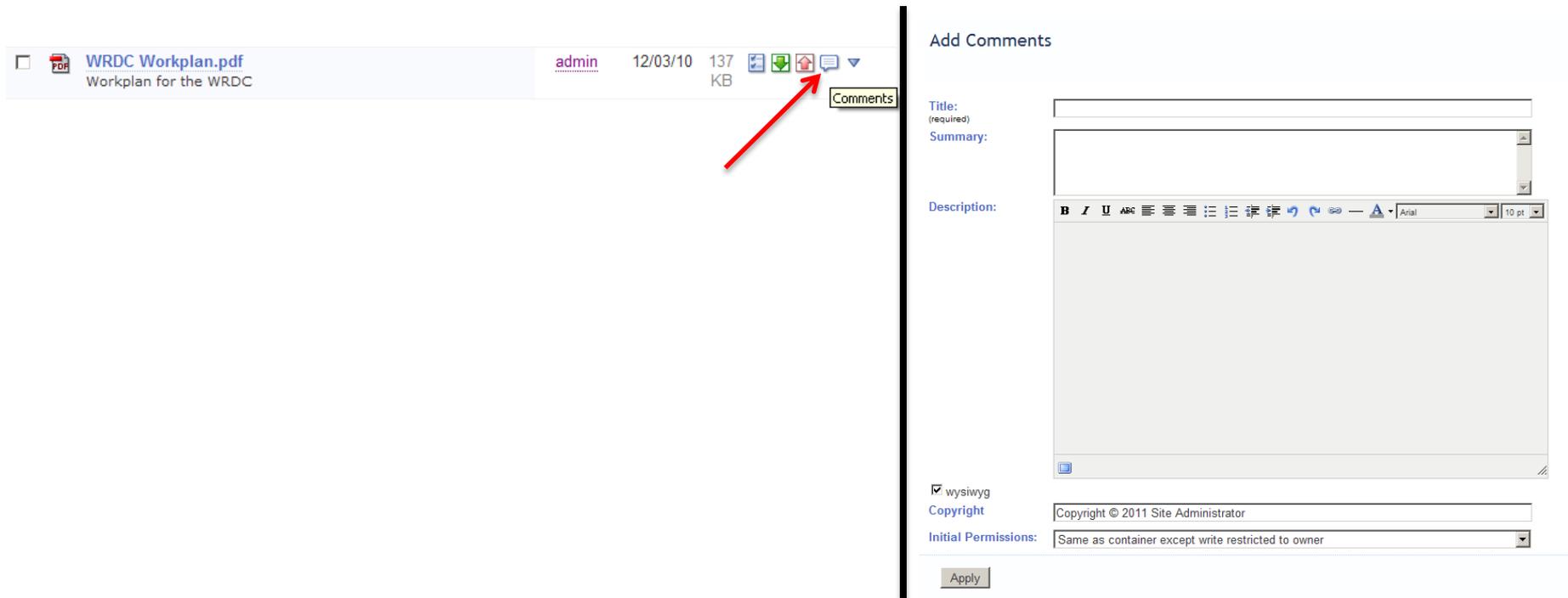


The screenshot shows the same document "WRDC Workplan.pdf" (137 KB) uploaded on 12/03/10 by user "admin". A red circle highlights the document icon in the top left corner, which now includes a lock symbol. Another red circle highlights the "More Actions" dropdown arrow in the top right corner, which is now disabled (greyed out).

\*Other users can still view and download the locked document, but versioning is now disabled

# Adding comments

- 🗨️ *Definition:* Informal commentary on a document
- 🗨️ *Example:* when co-authoring a document, add helpful comments for other authors



The screenshot shows a document interface. On the left, a file named "WRDC Workplan.pdf" is displayed with a PDF icon. The file details include the user "admin", the date "12/03/10", and the size "137 KB". A red arrow points to a comment icon in the toolbar. On the right, the "Add Comments" form is visible, featuring fields for "Title: (required)", "Summary:", and "Description:". The "Description:" field includes a rich text editor with a toolbar and a text area. Below the form, there are checkboxes for "wysiwyg" and "Copyright", and a dropdown for "Initial Permissions:". An "Apply" button is located at the bottom of the form.

# Additional Help

- DocuShare tutorials & user guide

<http://infoshare.azwater.gov/docushare/dsweb/helpdesk/Documentation>

# Questions?

Sharon S. Morris  
ssmorris@azwater.gov

Karen A. Fisher  
kafisher@azwater.gov

Arizona Department of Water Resources  
3550 N. Central Ave.  
Phoenix, AZ 85012  
(602) 771-8500