



DFM QUICK START GUIDE

File Sharing

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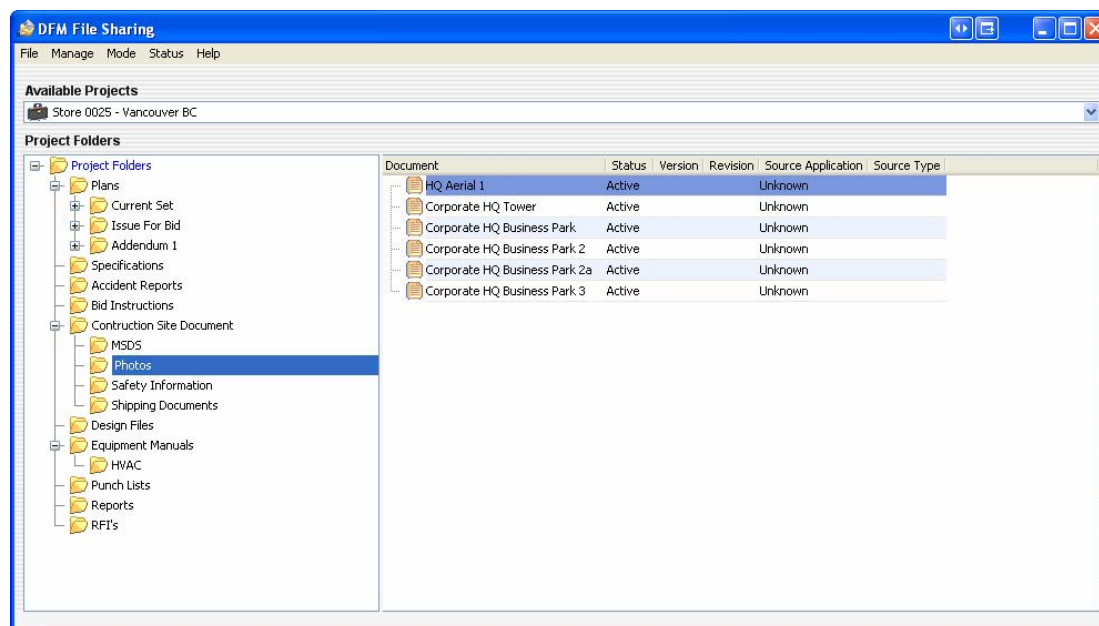
DFM FILE SHARING OVERVIEW

DFM File Sharing is an application that connects to your DFS system and allows you to manage documents that are in the system. All documents that you work with are saved in the DFS Vault and use the DFS Version Control System.

DFM File Sharing stores all file types, Microsoft Word and Excel, AutoCAD drawings, JPEG photos, MPEG movies, and any other file type. It allows you to collaborate and share documents during any phase of the project. You can add files and subfolders. You can open, edit, and view documents. You can copy, paste, resequence, and do anything that you need to do to manage and collaborate on your project documents. The folders and documents that you see in File Sharing can also be viewed online in a DFS portal where they can be viewed, printed, ordered, and downloaded.

The advantage of using DFM for your file storage and management over other systems like FTP is the Version Control System. With DFM, you have a complete history of all the project documents. Every version of the document is stored in the DFS vault. Nothing is deleted or over-written. At the end of the project, you can receive the entire project on a closeout disk.

The purpose of this guide is to instruct you on how to quickly set up and get started with File Sharing. This is the Quick Start Guide. Consult the full *DFM User Guide – File Sharing* for more detailed DFM File Sharing user information.



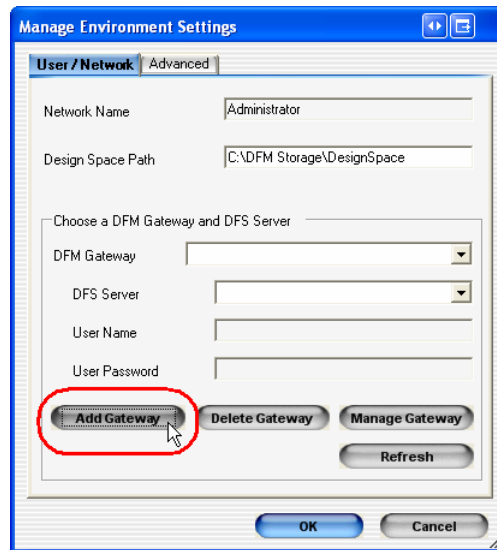
DFM FILE SHARING SETUP

Prior to using the DFM system for file sharing and collaboration, there are some simple setup steps that must be completed.

Connecting to a DFS Server

Open **DFM File Sharing**. The **Manage Environment Settings** window appears. (If it does not appear and File Sharing opens, click the **Manage** menu and select **Environment Settings**.)

Click **Add Gateway**.



In the Add DFM Gateway window, enter the name of your server in the **Display Name** field. Enter the **Server Address** of your DFS server. Enter your **User Name** and **User Password**.

Display Name: _____
Server Address: _____
User Name: _____
User Password: _____

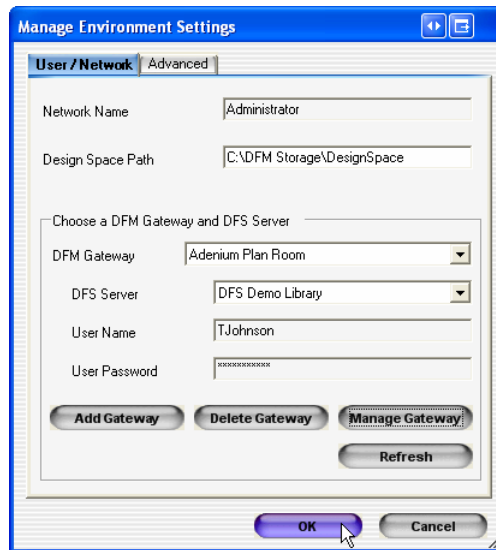


Click **Test Connection**. You should receive a message that the connection was successful. Click **OK**.

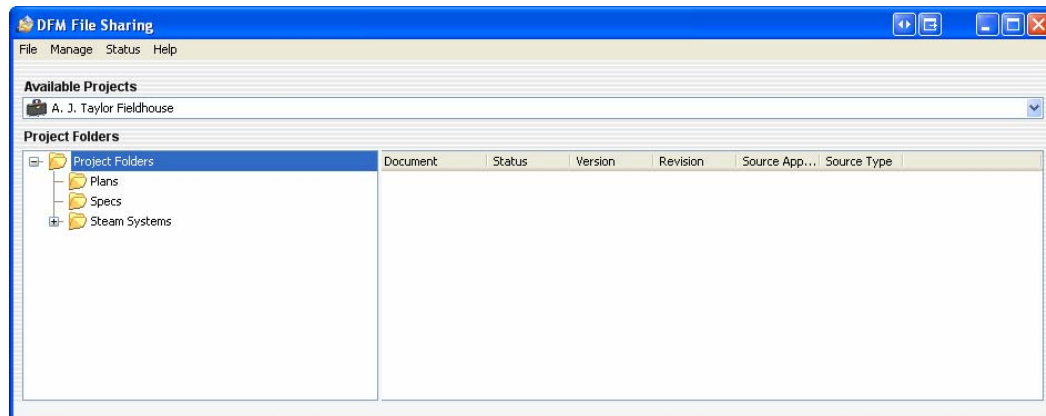
If the connection was not successful, carefully review your entries and retry the test. If it is still not successful, contact your DFS administrator.



In the **Manage Environment Settings** window, select the **DFM Gateway** you just created. Verify that the **DFS Server** is correct. Click **OK**.



DFM File Sharing will connect the DFS server and open.



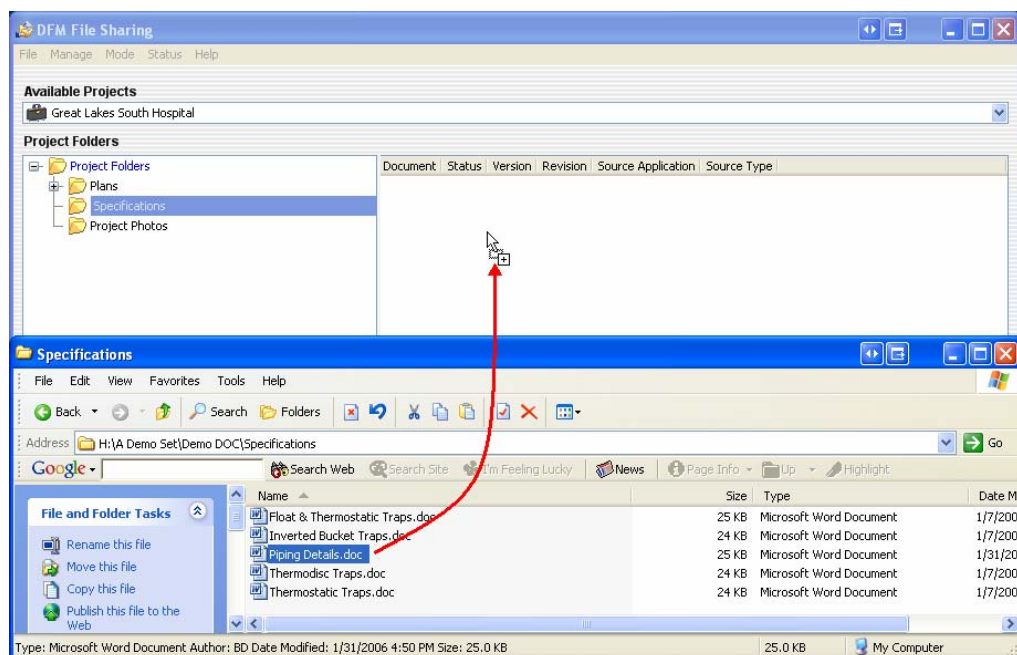
DFM FILE SHARING OPERATIONS

Adding Files

Files can be added to a folder by dragging them into the File Sharing window.

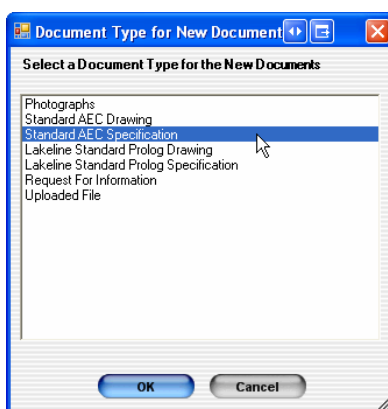
To add files to a folder, select the project under **Available Projects**. All the projects that you have access to are listed there. Under **Project Folders**, select the folder in which you want to add the files.

Then, on your local drive, select the files that you want to add to the folder and drag them into the open folder in the File Sharing window.

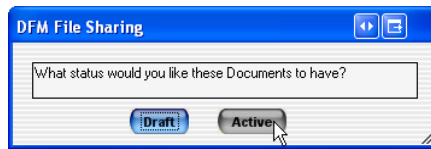


When you drop the files, the files may be uploaded immediately or you may be prompted to enter some further information. Some folders will require you enter information about the documents that you are adding before they are uploaded. If prompted, do the following (you may not be prompted for all of the following steps):

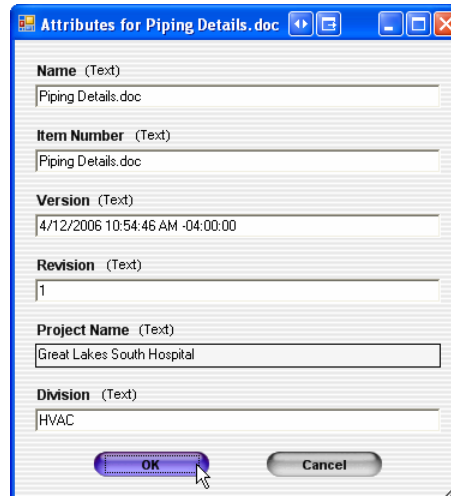
Select the type of document it is and click **OK**.



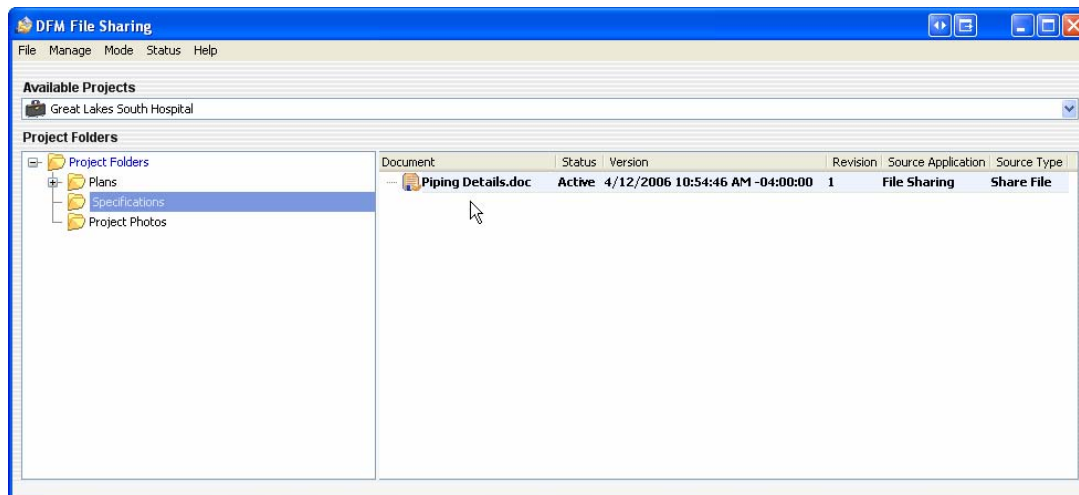
Select **Active** or **Draft** to set the status of the documents.



Enter the attributes for the documents and click **OK**. A red star next to a field indicates that the attribute is required.



The document will be uploaded into the system and will appear in the folder.



Document Operations

There are many advantages of working with DFM File Sharing. With the system's version control system, all document activity is tracked. Every document that comes into the system is versioned. If a duplicate document is added to DFS, it gets a new version number and becomes the current version and previous versions are marked with a red dot to indicate that it is an older version. No documents are deleted or over-written.

There are three ways to access a document that is already in the system. You can open, edit, or view the document.

Opening a Document: When you open a document, you are opening the native "Design" version of the document in Read-Only mode.

Editing a Document: When you edit a document, you are checking out the "Design" version of the document. The document is marked as "Under Change" and no one else can make changes. You can then make changes and then check the document back in as a new version.

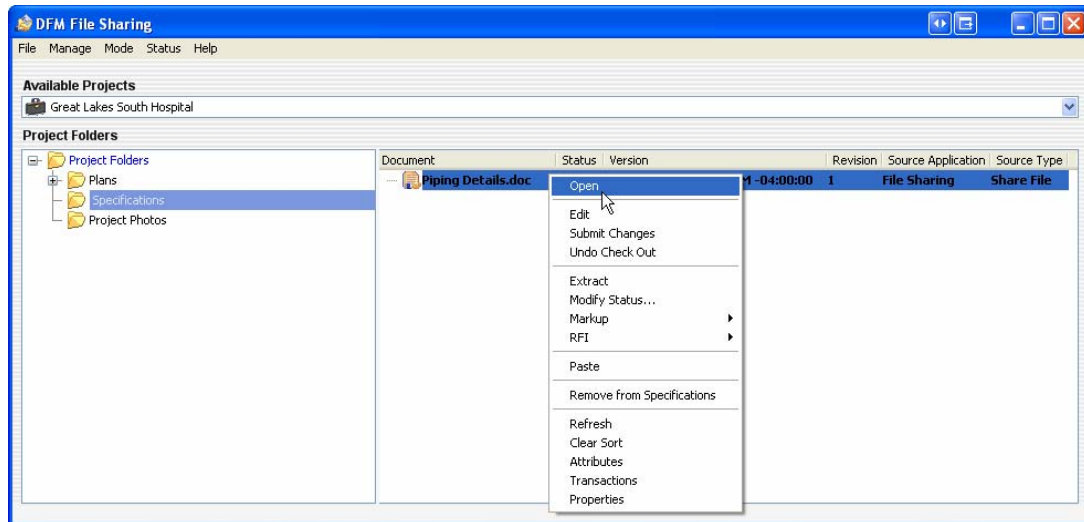
Viewing a document: When you view a document, you are opening the "Viewable" version of the document. This might be the same as the native design file or it might be a in a different format. For example, if you view plans, the original may be a TIF file but the viewable version could be a low-resolution PDF file.

You can always access documents out of the File Sharing window. Every time you view, open, or edit a document, it is downloaded to your local machine. DFM will select the download location. As a consequence, you do not need select, remember, or search for a document download location. All you have to do is access it right out of the File Sharing window. If you already have the current version, it will access the local copy. If it is not the current version, DFM will download the current version for you. DFM manages all of your downloads for you.

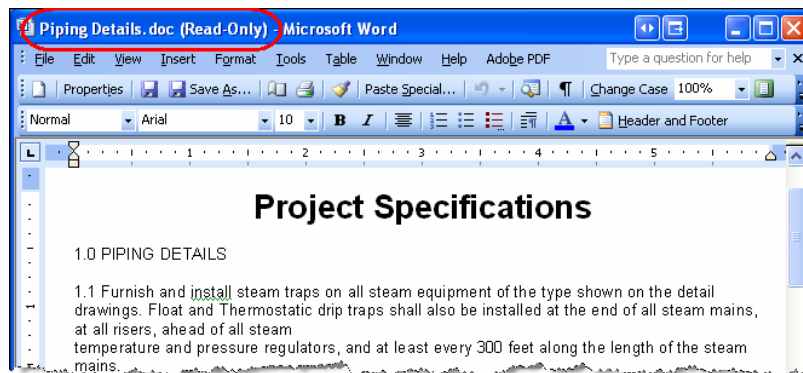
Opening a Document

Opening a document will open the native design file in Read-Only mode.

To open a document, right click on the document and select **Open**.



The document is downloaded to your machine and is opened in Read-Only mode.

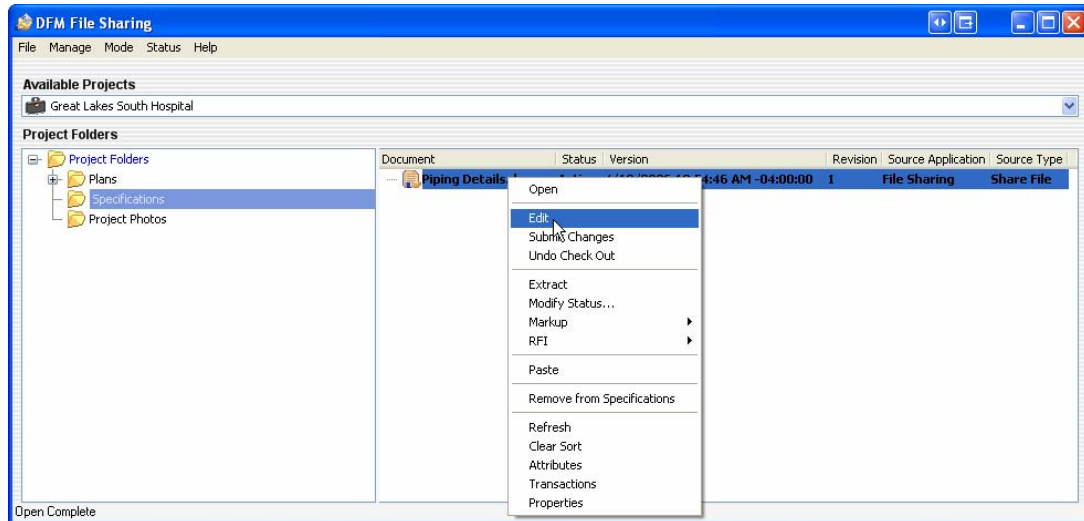


Close the document when you are finished. If you need to re-open it, repeat the steps to open the file in File Sharing. DFM will not need to download the document again unless it has been updated. In which case, it will download and open the current version.

Editing a Document

When you edit a document, you are checking out the “Design” version of the document. The document is marked as “Under Change” and no one else can make changes. You can then make changes and then check the document back in as a new version.

To edit a document, right click on the document and select **Edit**.

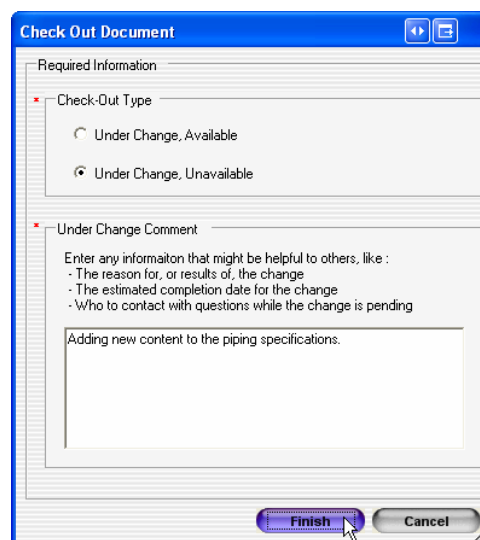


Do one of the following:

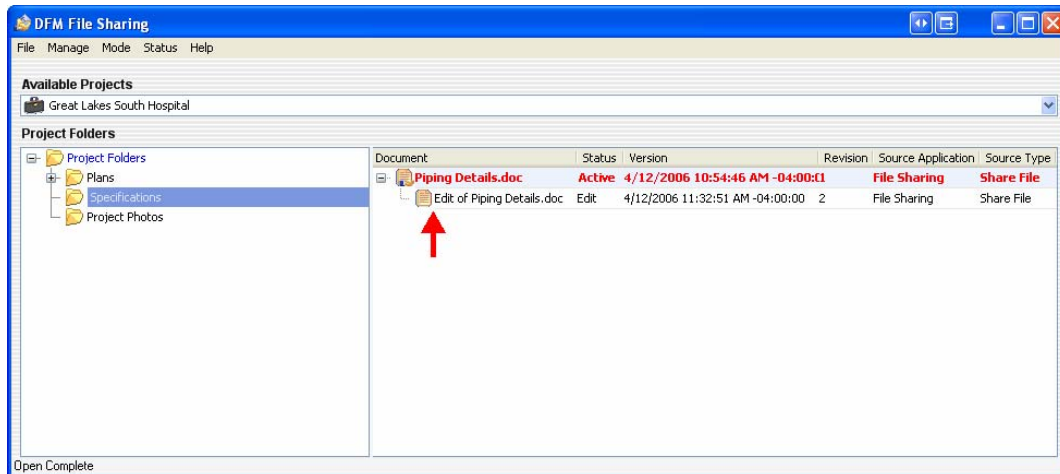
Select **Under Change, Available**. This will mark the document as “Under Change” and keep it available for other users to view the document while it is checked out.

Select **Under Change, Unavailable**. This will mark the document as “Under Change” and restrict the document from being accessed by others while it is checked out.

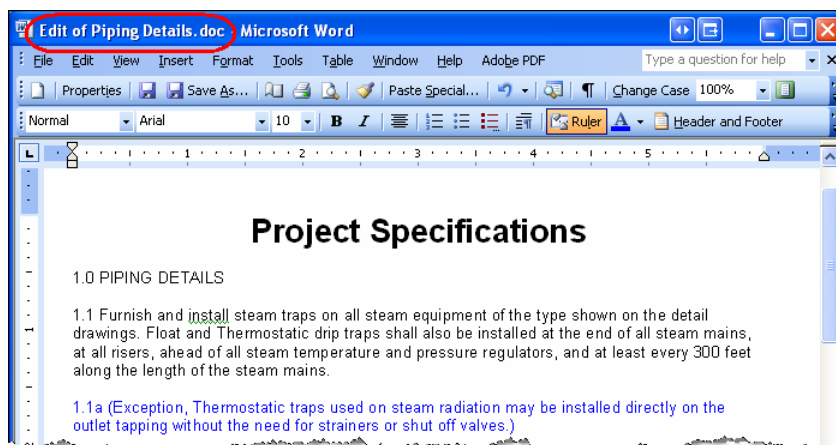
Enter a description of why you are editing the document for the **Under Change Comment**. Click **Finish**.



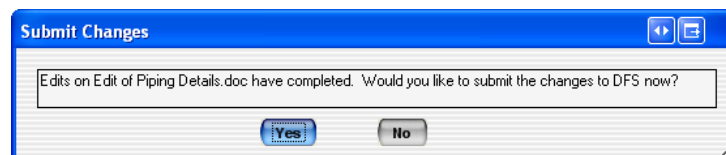
The document will be downloaded to your machine. In File Sharing, the document will be displayed in red, indicating that it is under change. It also displays the edited version of the document under the original.



The document is open and available for editing. The title of the document begins with “**Edit of...**” indicating that this document is under change and editable. Make the necessary edits.

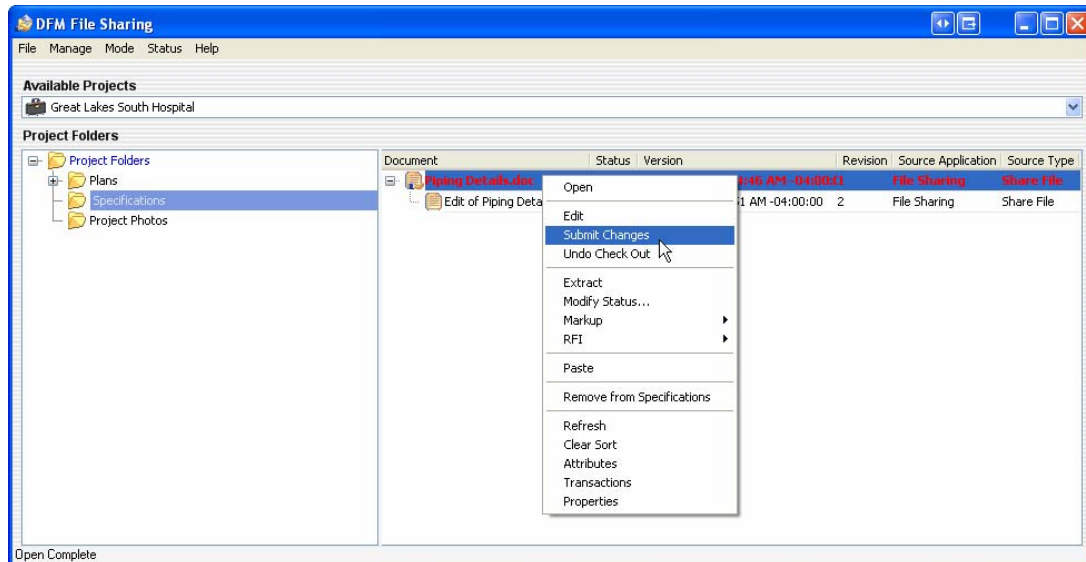


When complete, you can close the document. When you close the document, DFM will prompt you if you want to submit the changes now. Click **Yes** or **No**. If you click **Yes**, the document will be uploaded as a new version. If you click **No**, the document will remain checked out.

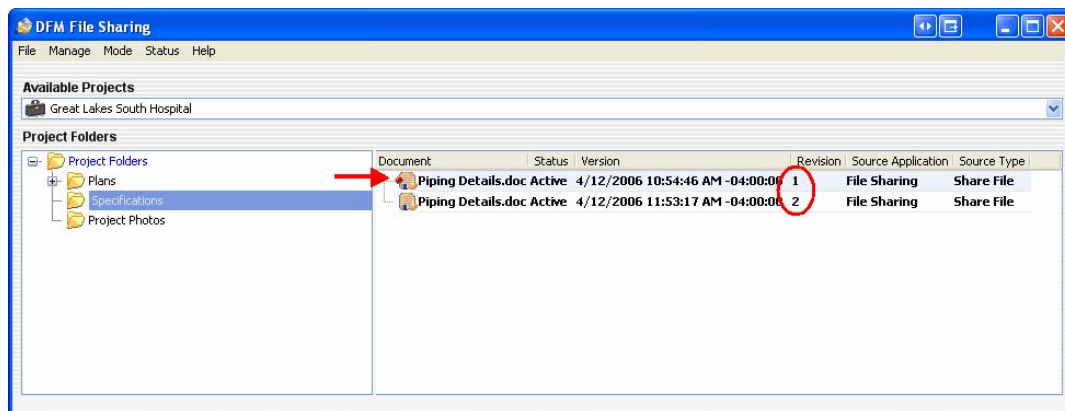


If you do not submit the changes now, you can reopen the “Edit of” document from File Sharing to make further edits. DFM will automatically access the checked out document that you have on your machine.

You can submit the changes at any time. To submit the changes and check the document back in as a new version, right click on the document in File Sharing and select **Submit Changes**.



The document is checked in as a new version and is available for others to edit or access. Previous versions are still in the system and marked with a red dot, indicating that they are not current. (Depending on the folder properties, old versions of a document may not be displayed.)

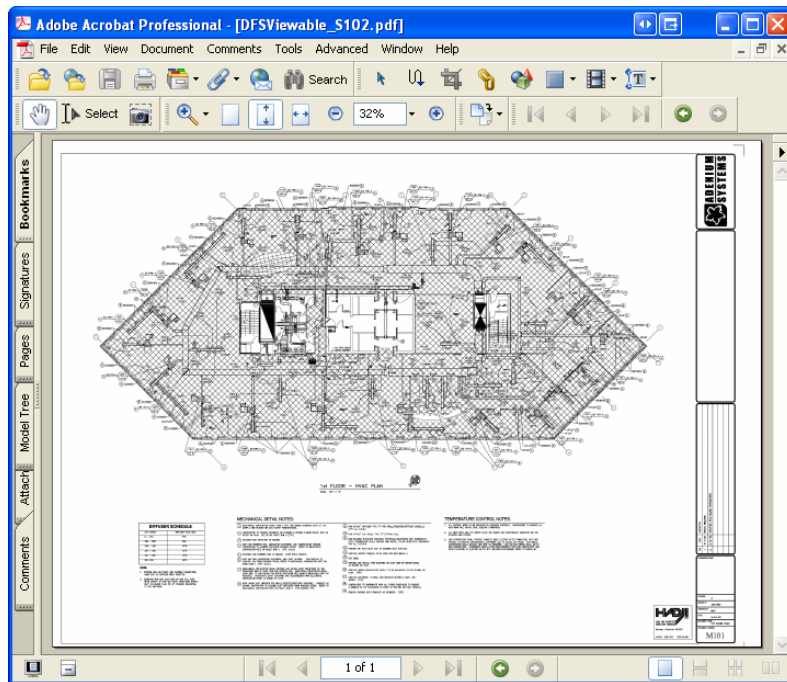


Viewing Documents

When you view a document, you are opening the “Viewable” version of the document. This might be the same as the native design file or it might be in a different format. For example, if you view plans, the original may be a TIF file but the viewable version could be a low-resolution PDF file.

To view a document, double click on the document in File Sharing. You can also right click on the document and select **View**. (If **View** does not appear in the menu, you need to turn it on by going to the **Manage** menu and selecting **Options**. Click **View** on the **Context Menus** tab.)

The viewable format of the document is opened.

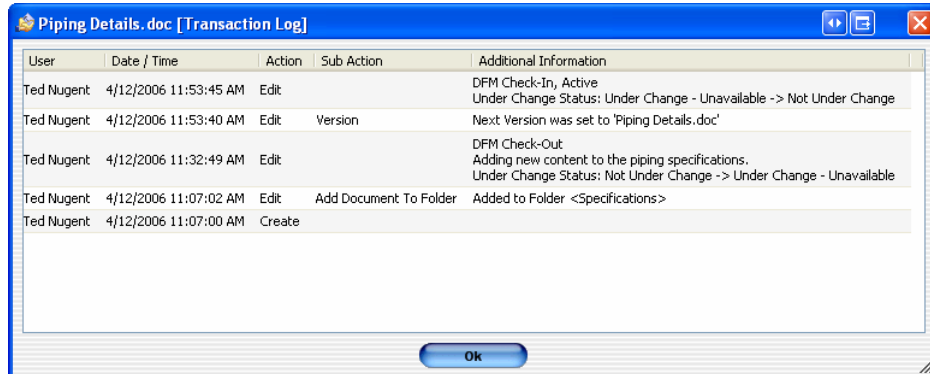


Close the document when finished.

Viewing Document Transactions

You are able to view all of the transactions that were made to a document, such as when it was added, when it was checked out, and under change comments. It will also tell you who performed the actions.

To view the transactions of a document, right click on the document and select **Transactions**.

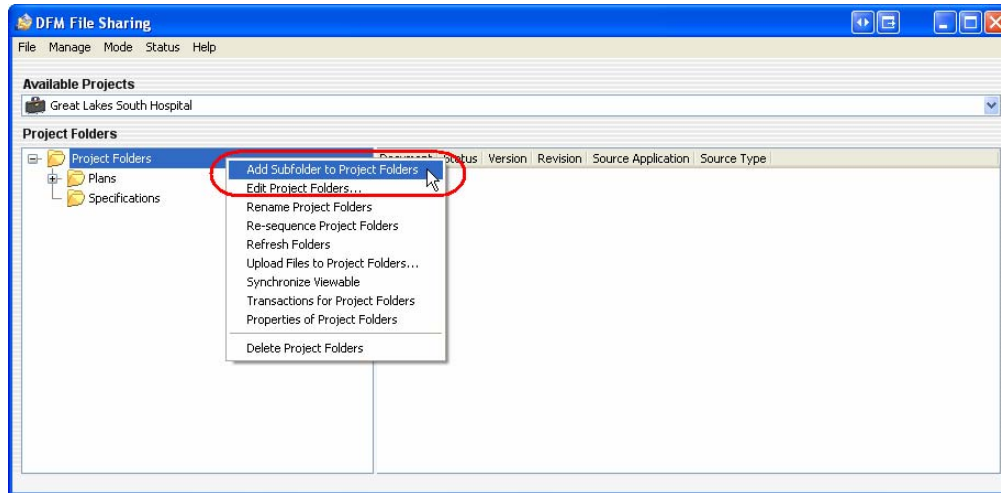


Click **OK** when finished.

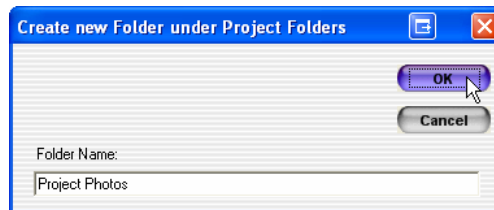
Adding a Subfolder

You can add subfolders to any folder in the folder tree.

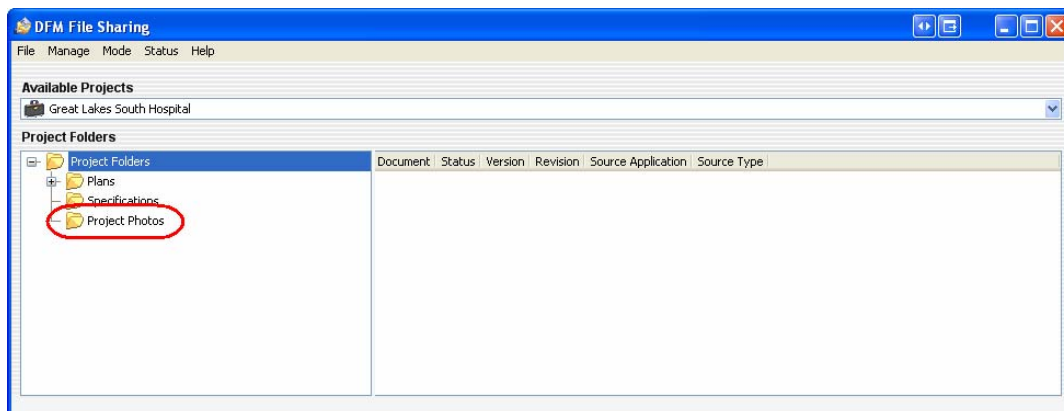
To add a subfolder, right click on the folder in which you want to add the new folder and click **Add Subfolder To**



Enter the name of the folder in the **Folder Name** field and click **OK**.



The folder is added.



For more information on DFM File Sharing, see the full *DFM User Guide – File Sharing*.



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