



DFM USER GUIDE

FILE SHARING

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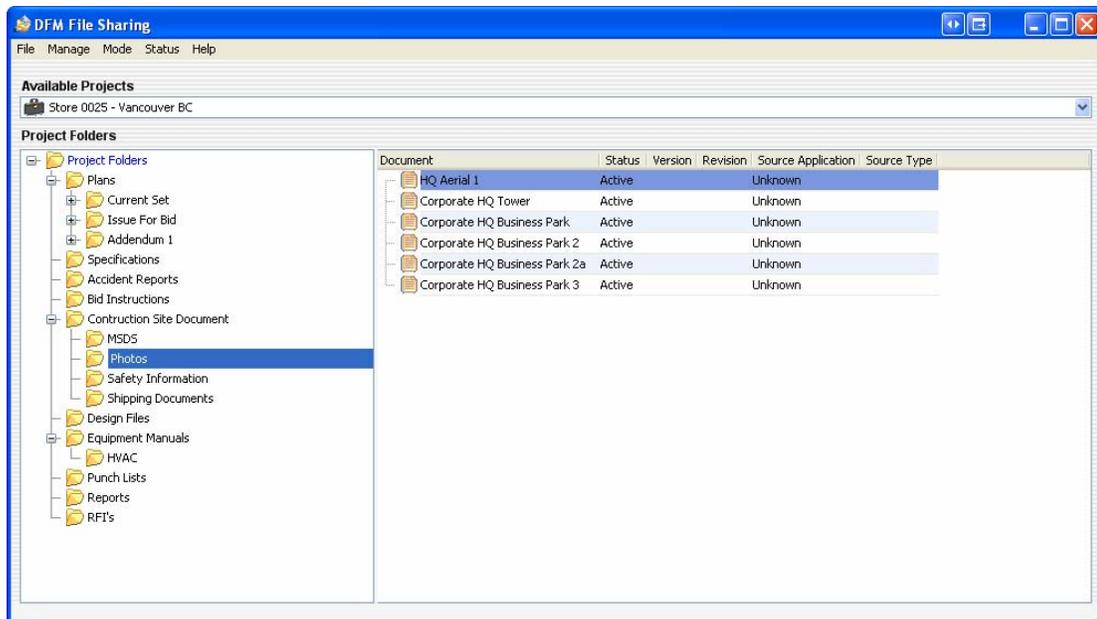
DFM FILE SHARING OVERVIEW

DFM (Design File Manager) was designed to help you manage and collaborate on design files and other project files. DFM File Sharing is an application that connects remotely to a 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 set up and operate File Sharing.



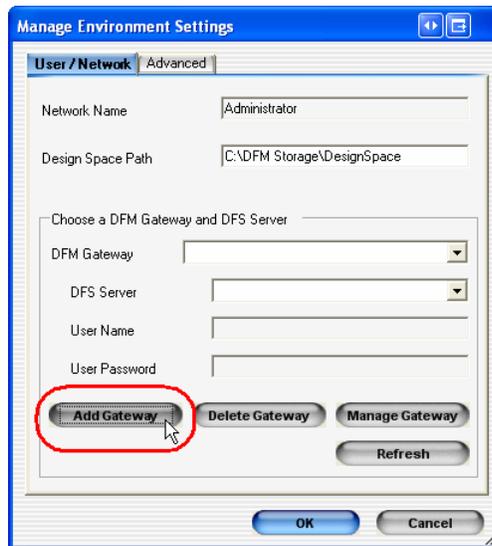
DFM FILE SHARING SETUP

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**.



The system administrator will provide you with the following information:

Display Name: _____

Server Address: _____

User Name: _____

User Password: _____

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

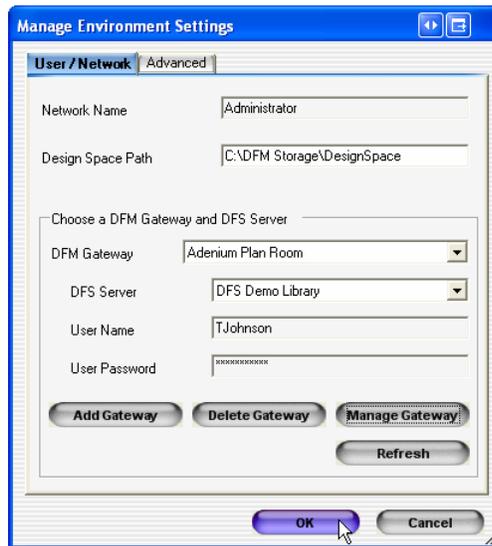


Click **Test Connection**. You should receive a message that the connection was successful. Click **OK**.

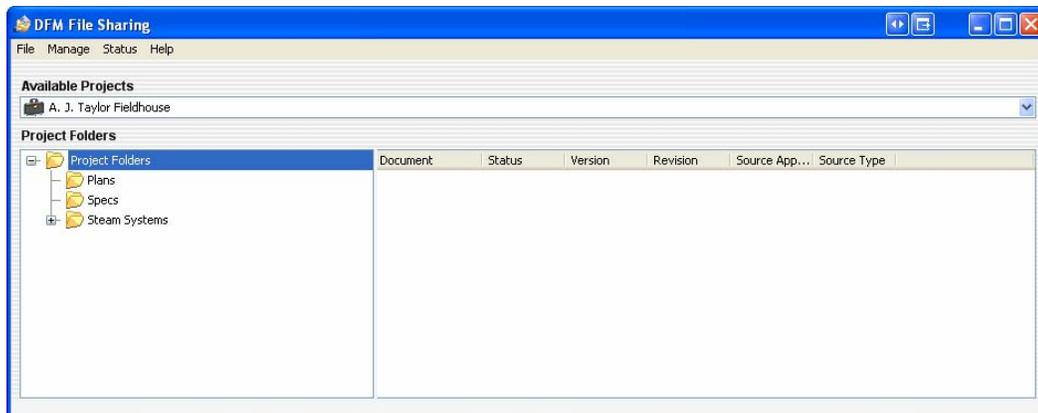
If the connection was not successful, carefully review your entries and retry the test. If it is still not successful, contact the system administrator.



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.



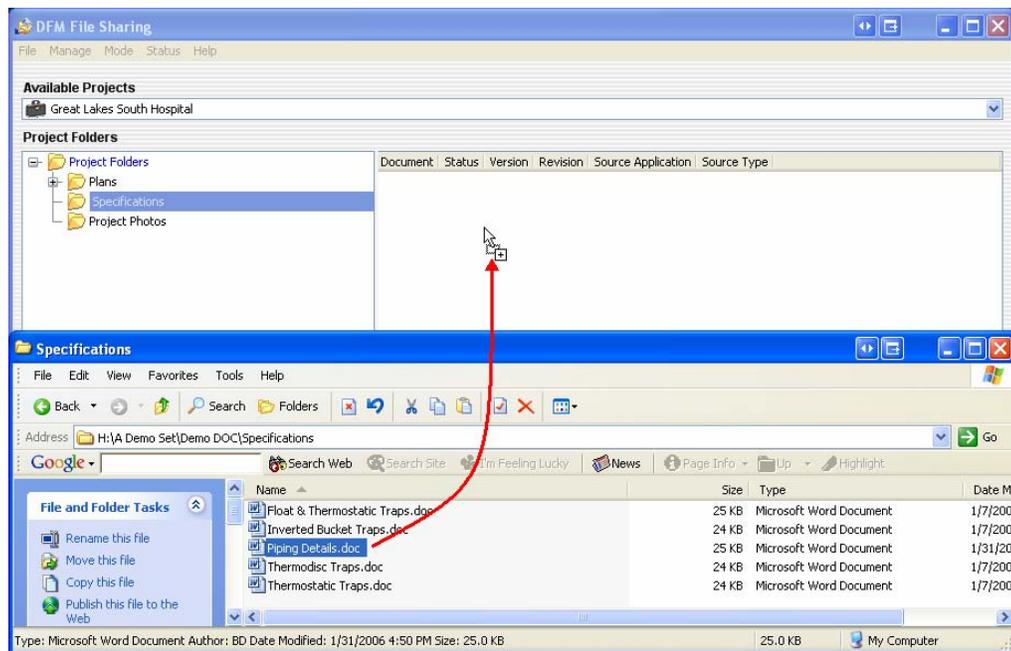
DFM FILE SHARING OPERATIONS

Adding Files

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

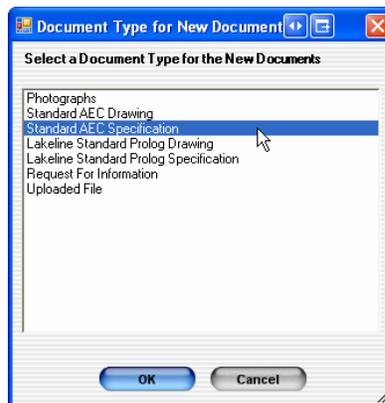
To add files to a folder, select the project under **Available Projects**. All the projects that you have access to are listed there. Under **Project Folders**, select the folder in which you want to add the files.

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.

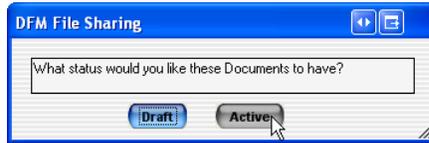


When you drop the files, the files may be uploaded immediately or you may be prompted to enter some further information. Some folders will require you enter information about the documents that you are adding before they are uploaded. If prompted, do the following (you may not be prompted for all of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

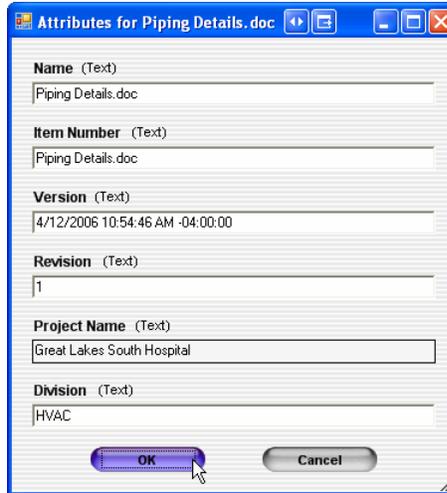
Select the type of document it is and click **OK**.



Select **Active** or **Draft** to set the status of the documents. Active documents are immediately available for viewing and ordering if this project is on a DFS web portal. Draft documents must go through an approval process before they are available on the DFS web portal.

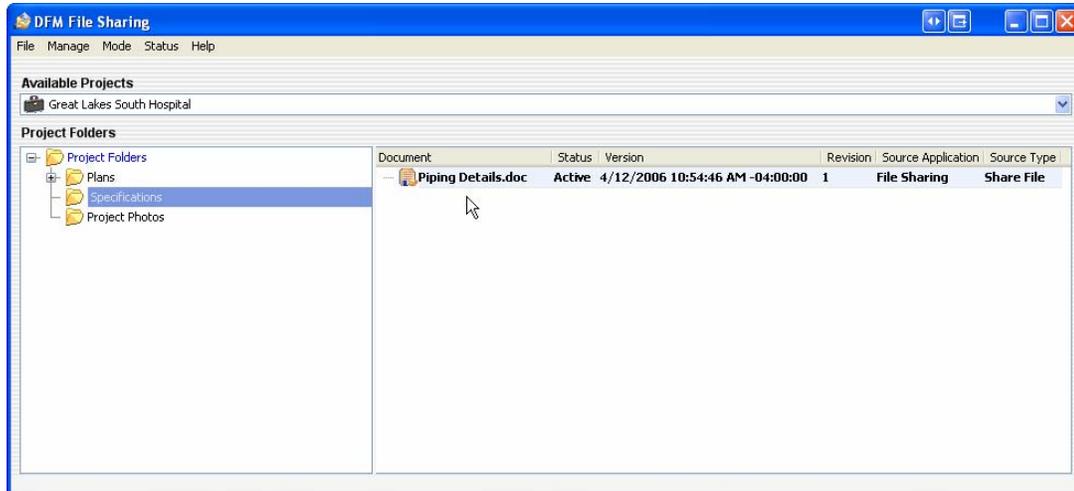


Enter the attributes for the documents and click **OK**. A red star next to a field indicates that the attribute is required.



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

If you added a file into a folder that already contains a file with the exact same name, then a new version of the existing document will be created. If the file name is unique, then the document will go in as the first revision.



Document Operations

There are many advantages of working with DFM File Sharing. DFM tracks all document activity. With the system's version control system, every document that comes into the system is versioned. If a duplicate document is added to DFS, it gets a new revision 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.

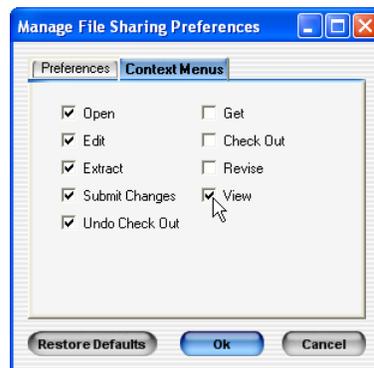
Opening a Document: When you open a document, you are opening the native “Design” format of the document in Read-Only mode.

Editing a Document: When you edit a document, you are checking out the “Design” format 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” format of the document. This might be the same as the design format or it might be in a different format. For example, if you view plans, the original may be a TIF file but the viewable format 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.

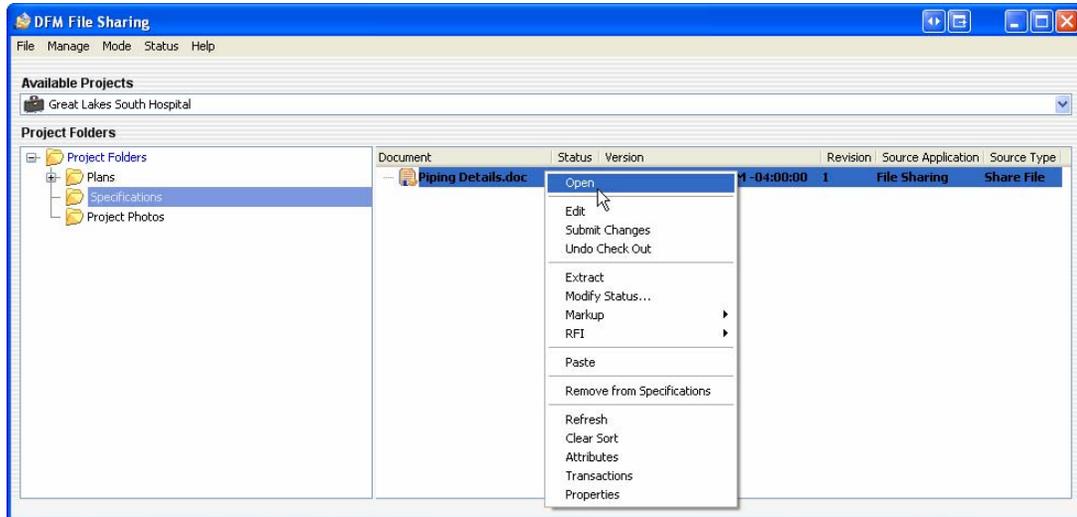
Note: If **Open**, **Edit**, or **View** do not appear in the right click menu, you need to turn them on by going to the **Manage** menu and selecting **Options**. Select **Open**, **Edit**, and **View** on the **Context Menus** tab and click **OK**.



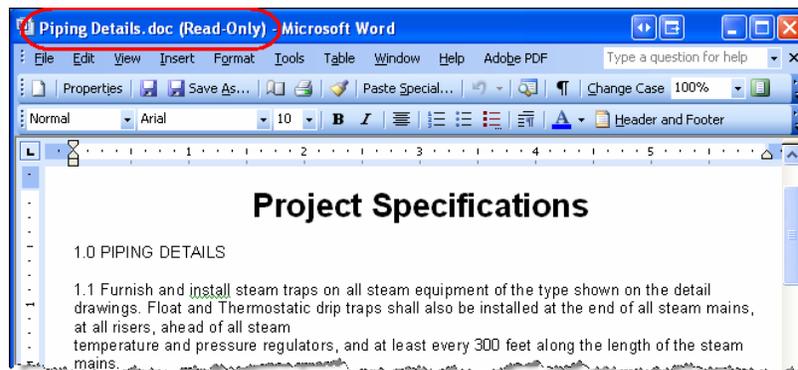
Opening a Document

Opening a document will open the native design format 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.

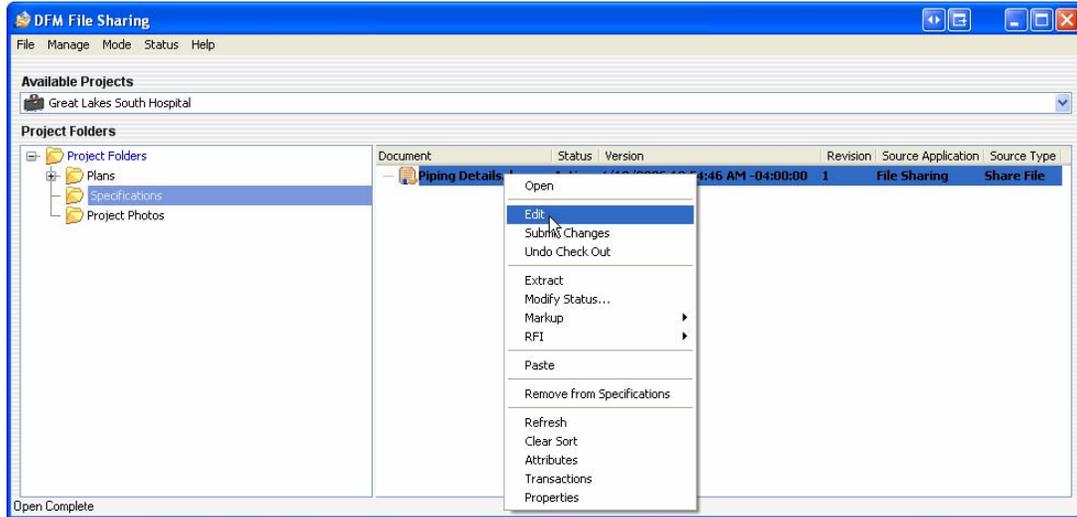


Close the document when you are finished. If you need to re-open it, repeat the steps to open the file in File Sharing. DFM will not need to download the document again unless it has been updated. In which case, it will download and open the current version.

Editing a Document

When you edit a document, you are checking out the “Design” format 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**.

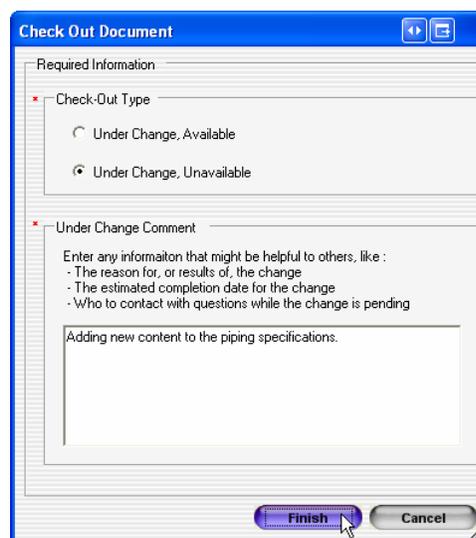


Do one of the following:

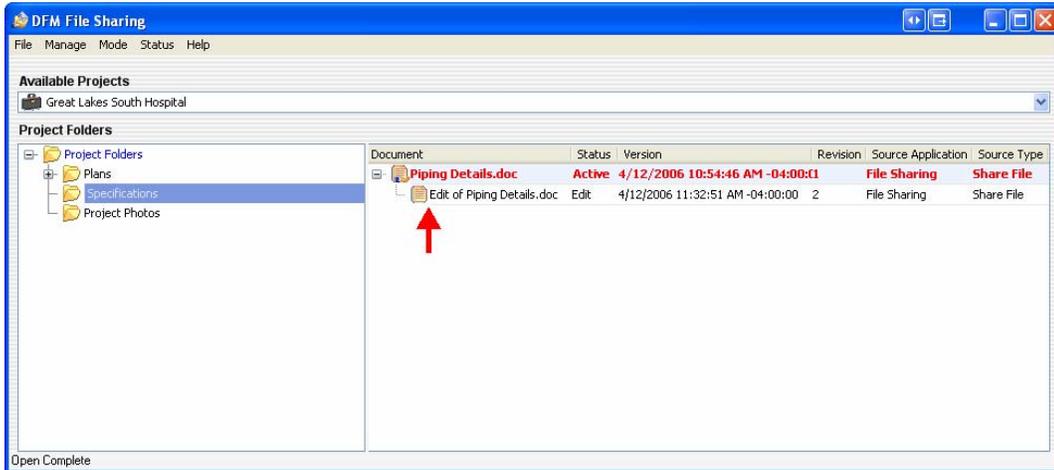
Select **Under Change, Available**. This will mark the document as “Under Change” and keep it available for other users to view the document while it is checked out.

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.

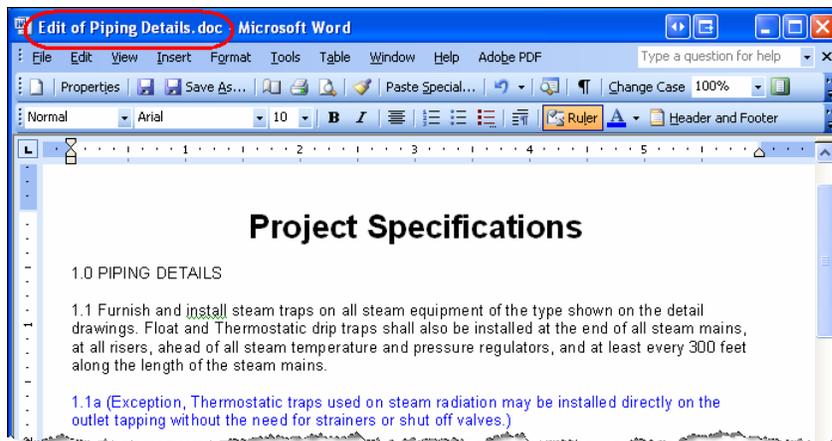
Enter a description of why you are editing the document for the **Under Change Comment**. Click **Finish**. This information will be displayed to others people who are using the system.



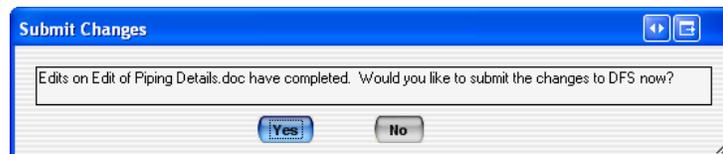
The document will be downloaded to your machine. In File Sharing, the document will be displayed in red, indicating that it is under change. It also displays the edited version of the document under the original.



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.

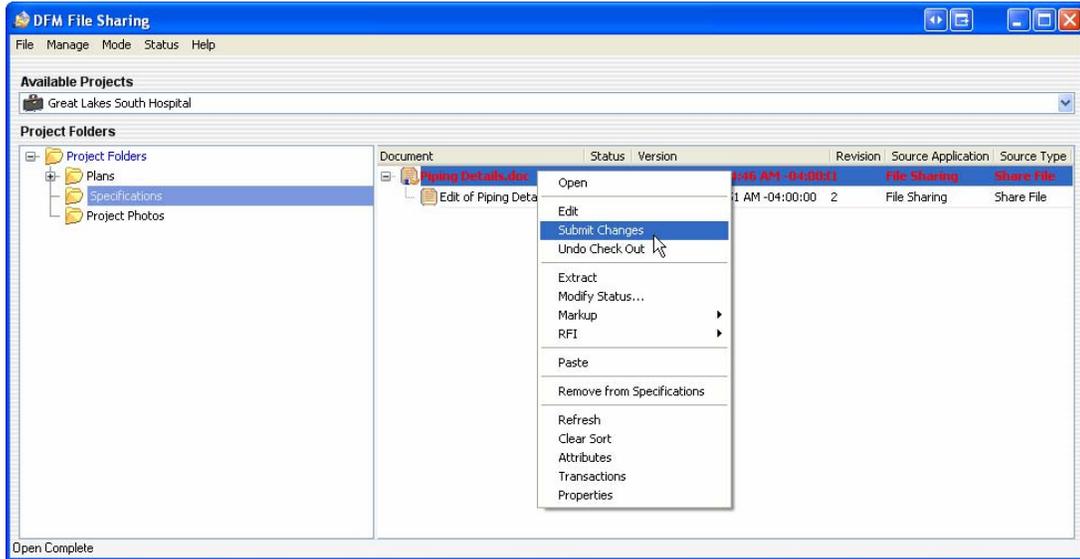


When complete, you can close the document and application. When you close the application used to edit the document, DFM will prompt you if you want to submit the changes now. Click **Yes** or **No**. If you click **Yes**, the document will be uploaded as a new version. If you click **No**, the document will remain checked out. (In order for this message to display, the application must have been opened by DFM and then completely closed. If the application was previously open or if you close the document only and leave the application open, this message will not display.)

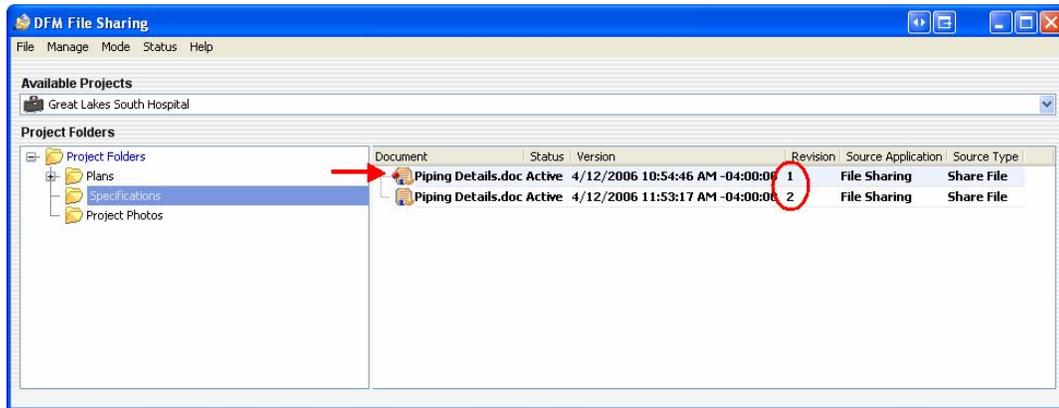


If you do not submit the changes now, you can reopen the “Edit of” document from File Sharing to make further edits. DFM will automatically access the checked out document that you have on your machine.

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.)

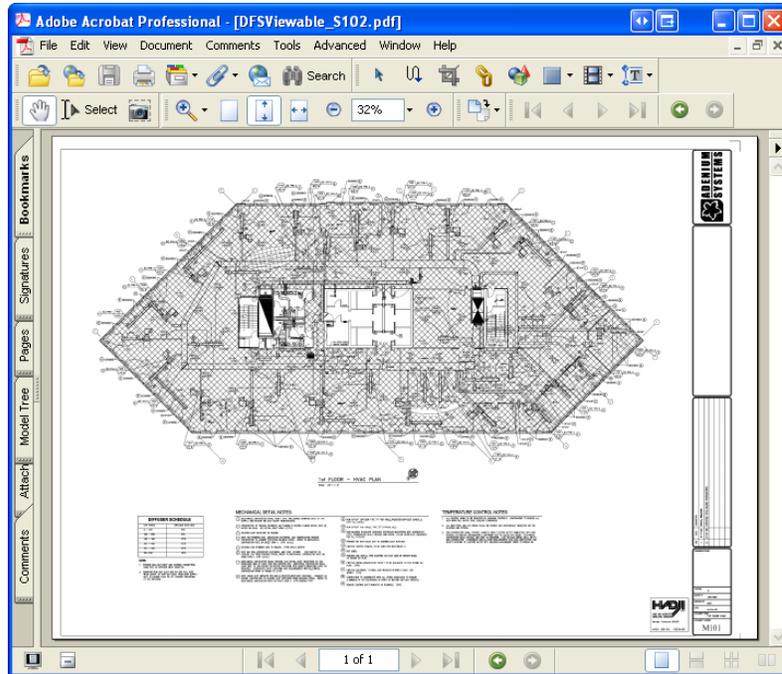


Viewing Documents

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

The viewable format of the document is opened.

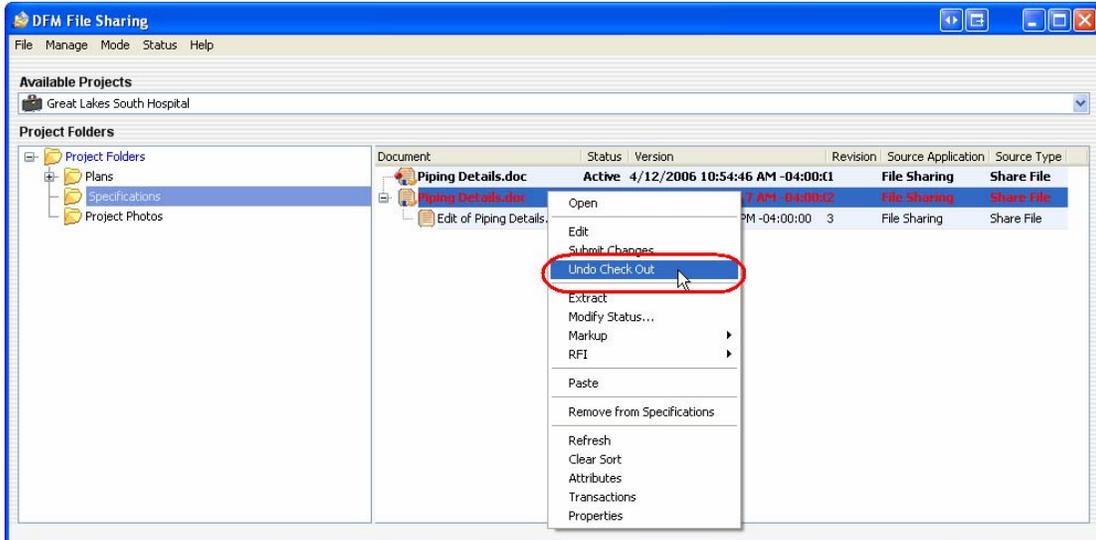


Close the document when finished.

Undoing a Checkout

You can undo a checkout if you decide that the checkout was not necessary.

To undo a checkout, right click on the document in red in File Sharing and select **Undo Checkout**.



If you made and saved changes to the document already, you will be asked if you want to delete the changes. Do one of the following:

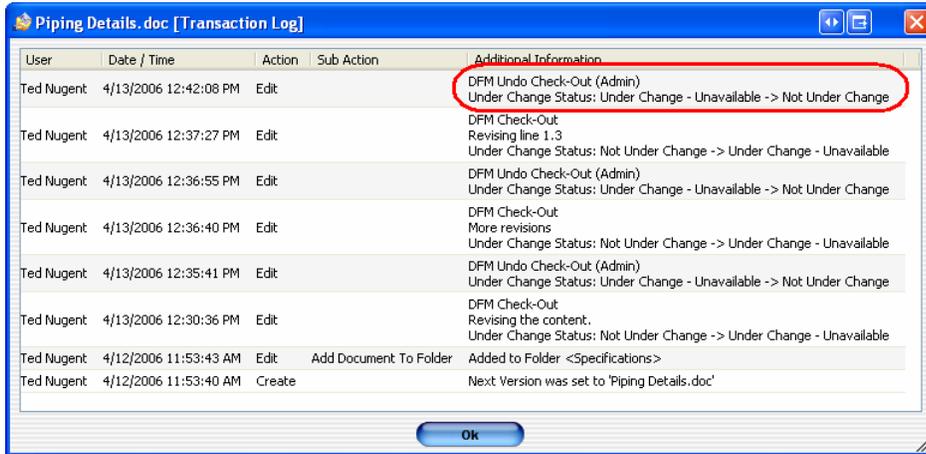
Click **Delete** to continue with the undo of the checkout and delete all of your changes. All changes that you made will be lost.

Click **Export** to continue with the undo of the checkout but save the changes in a different location on your machine. The document will lose its connection with DFM and be an independent entity.

Click **Cancel** to cancel the operation and keep the document checked out and under change.



If you clicked **Delete** or **Export**, the checkout is undone. The action will still be recorded in the transaction log. (For more information on the transaction log, see the “Viewing Document Transactions” section of this guide.)



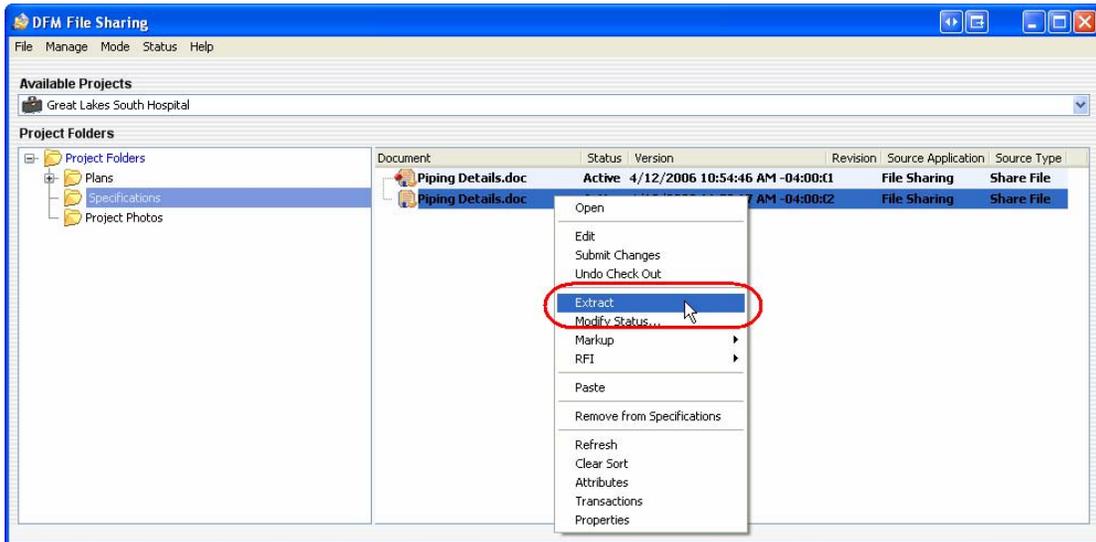
User	Date / Time	Action	Sub Action	Additional Information
Ted Nugent	4/13/2006 12:42:08 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:37:27 PM	Edit		DFM Check-Out Revising line 1.3 Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/13/2006 12:36:55 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:36:40 PM	Edit		DFM Check-Out More revisions Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/13/2006 12:35:41 PM	Edit		DFM Undo Check-Out (Admin) Under Change Status: Under Change - Unavailable -> Not Under Change
Ted Nugent	4/13/2006 12:30:36 PM	Edit		DFM Check-Out Revising the content. Under Change Status: Not Under Change -> Under Change - Unavailable
Ted Nugent	4/12/2006 11:53:43 AM	Edit	Add Document To Folder	Added to Folder <Specifications>
Ted Nugent	4/12/2006 11:53:40 AM	Create		Next Version was set to 'Piping Details.doc'

Ok

Extracting Documents

You can extract documents out of the DFS Vault and put in on a drive of your choice. In doing so, the document will lose its connection with DFM and be an independent entity. Consequently, it will lose all version control.

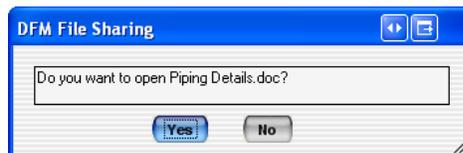
To extract a document, right click on the document and select **Extract**.



Select the location in which you want to place the document and click **OK**.



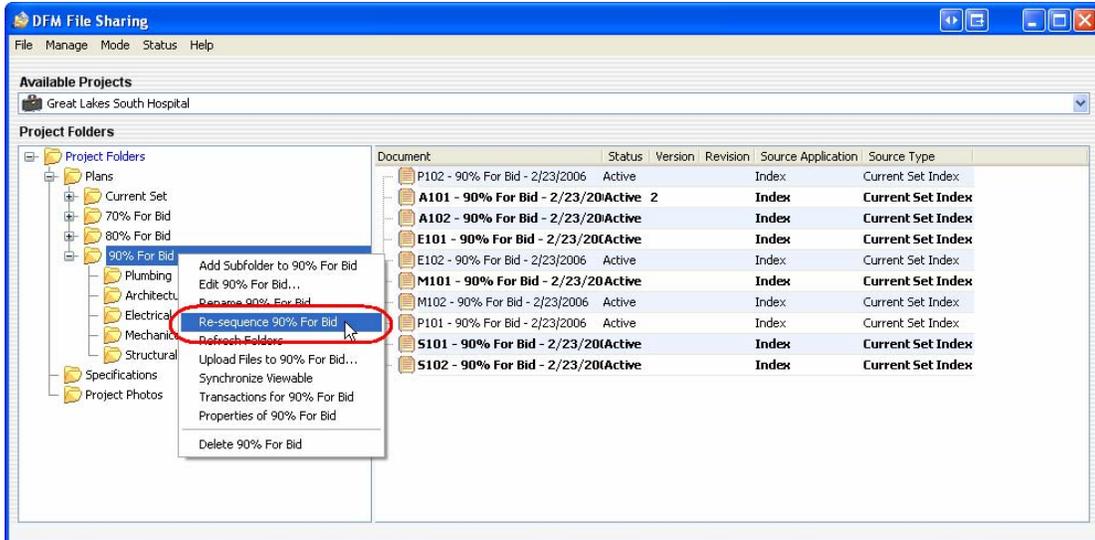
You will be asked if you want to open the document. Click **Yes** or **No**.



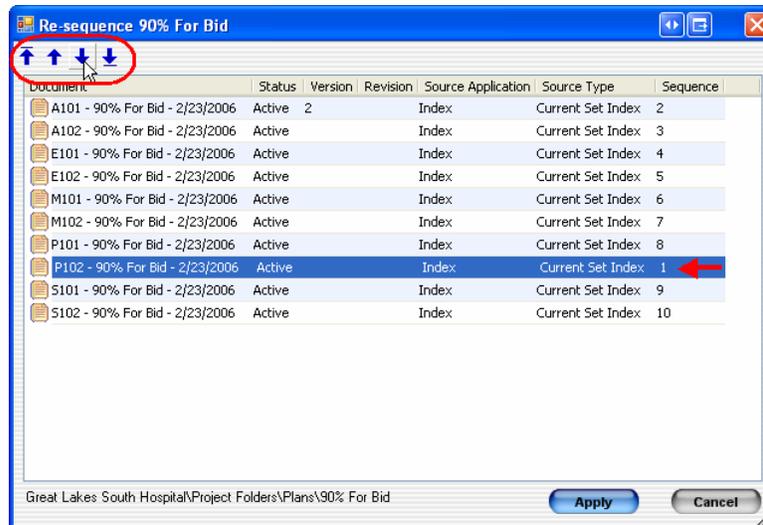
Resequencing Documents

You can set the sequence of documents if they need to be put in a different order. Sequencing is different than sorting. Sorting is a temporary order for viewing and is done by clicking on the column header. Sequencing is actually changing the order of the documents in the database and will affect how they are displayed on the web portal and in File Sharing for all users. It will also set the print order.

To sequence documents, right click on the folder that contains the documents you want to resequence and click **Resequence <Folder Name>**.

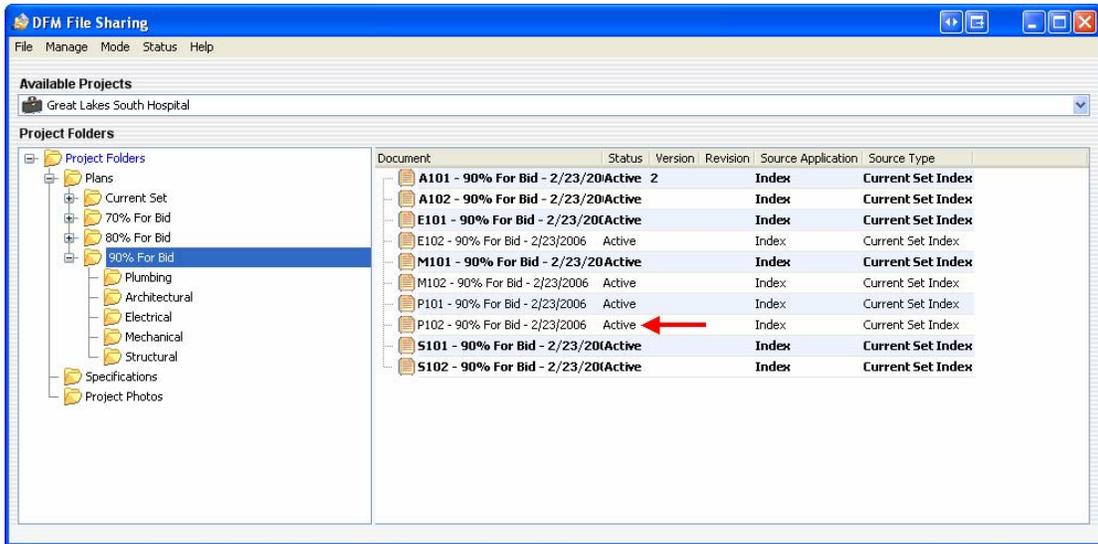


Drag the documents to the order in which you want them. You can also use the up and down arrow keys. To use a sort, click on a column header. Multiple documents can be selected at once by using the **Ctrl** and **Shift** keys while clicking.



Click **Apply** to save the changes.

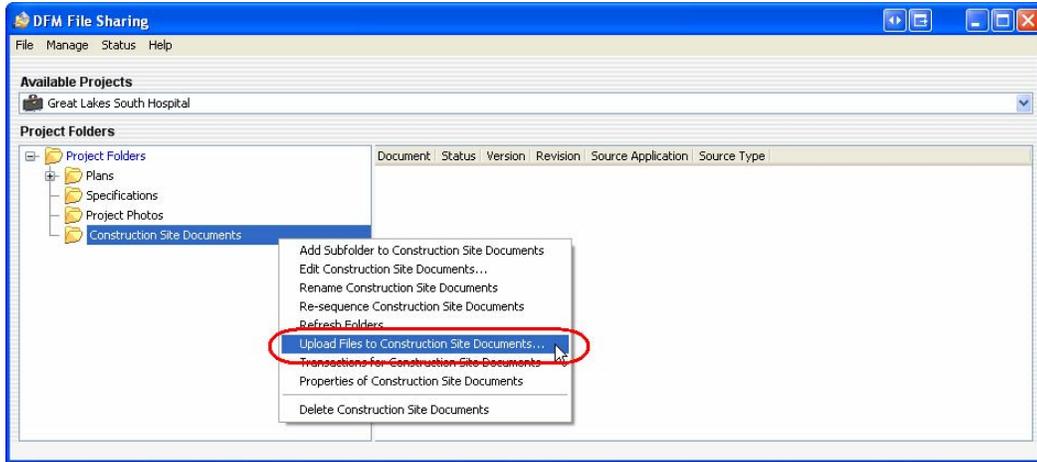
The documents display in File Sharing in the new sequence.



Uploading Folders and Documents by Browsing

You can upload a batch of documents into File Sharing. There are two ways to do so, you can use the Upload Files menu option or drag a folder or documents into the File Sharing window. If you drag a folder or documents, you get the additional option of compressing the files into one ZIP file.

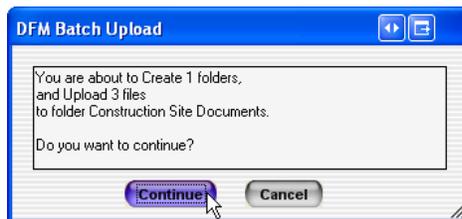
To upload a folder and all of its documents and subfolders, right click in File Sharing on the folder to which you want to upload the files and select **Upload Files To....**



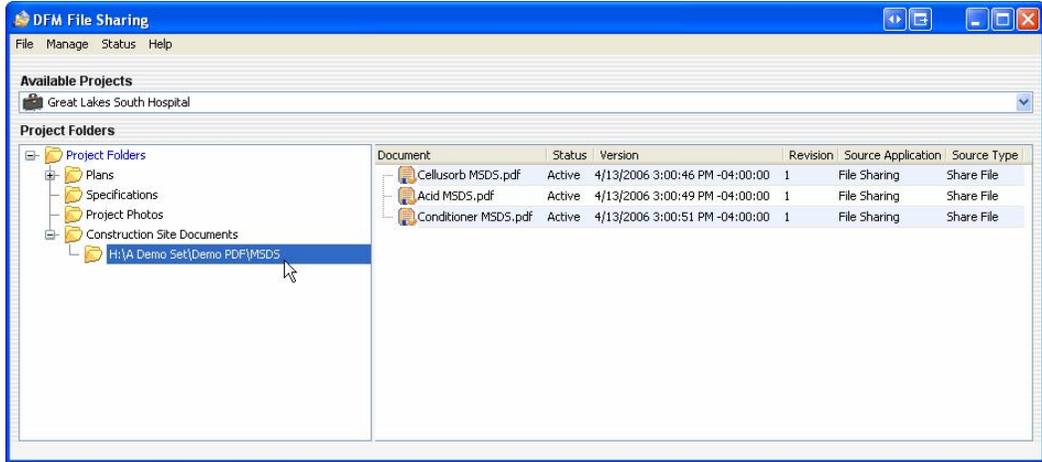
Select the folder that you want to upload and click **OK**.



A message displays to verify what you are about to upload. Click **Continue**.



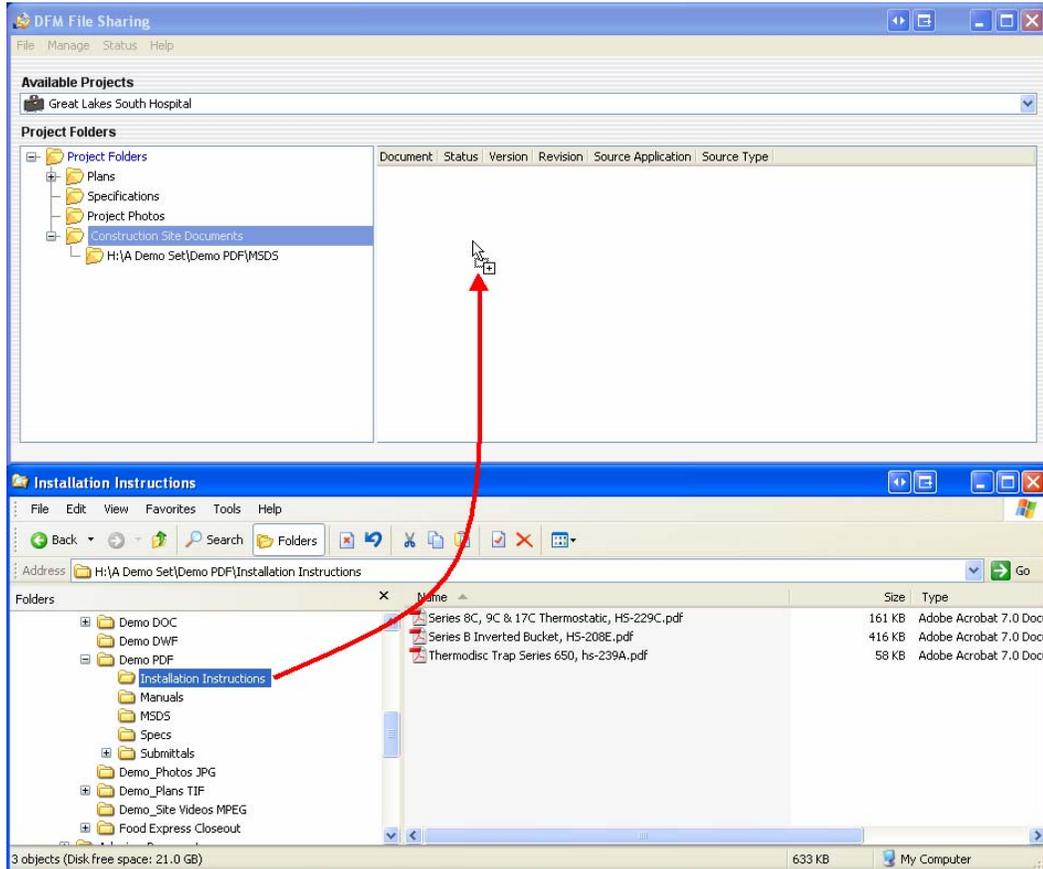
The folder is uploaded with all of its documents and subfolders. The File Sharing folder name is the original path of the folder. You can rename the folder if needed.



Uploading Folders and Documents by Dragging and Dropping

You can drag and drop a folder or a group of documents into a File Sharing folder. When you drag a folder into File Sharing, you can upload it as a single ZIP file or as individual files and folders.

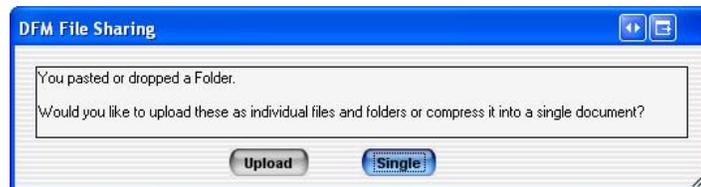
To upload folders or documents, select the folder in File Sharing in which you want to upload the files. Drag the folder or group of documents into the File Sharing window.



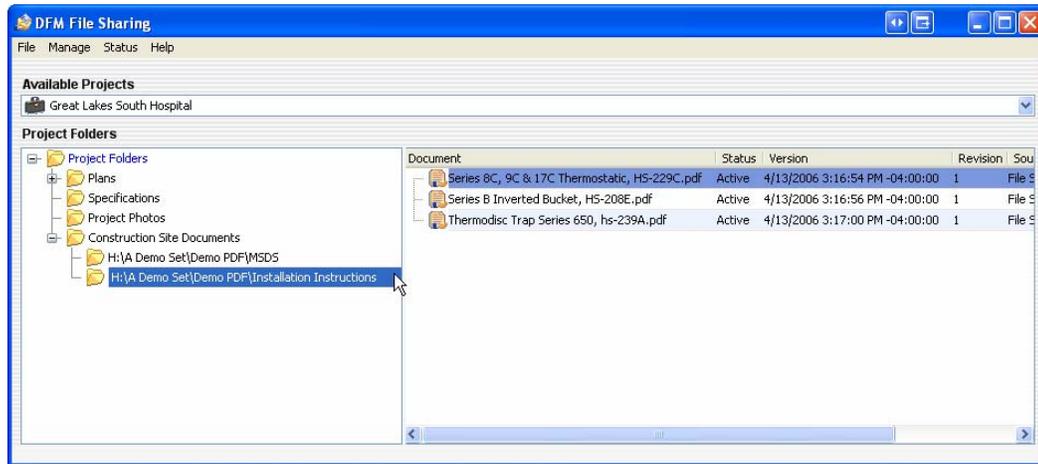
If you are uploading a folder, you are asked if you want to upload it as individual files and folders or if you want to compress them into a single ZIP file. Do one of the following:

Click **Upload** to upload the folder and all subfolders and documents as individual files.

Click **Single** to compress all of the files into a single ZIP file.



If you selected **Upload**, the folder is uploaded with all of its documents and subfolders. The File Sharing folder name is the original path of the folder. You can rename the folder if needed.

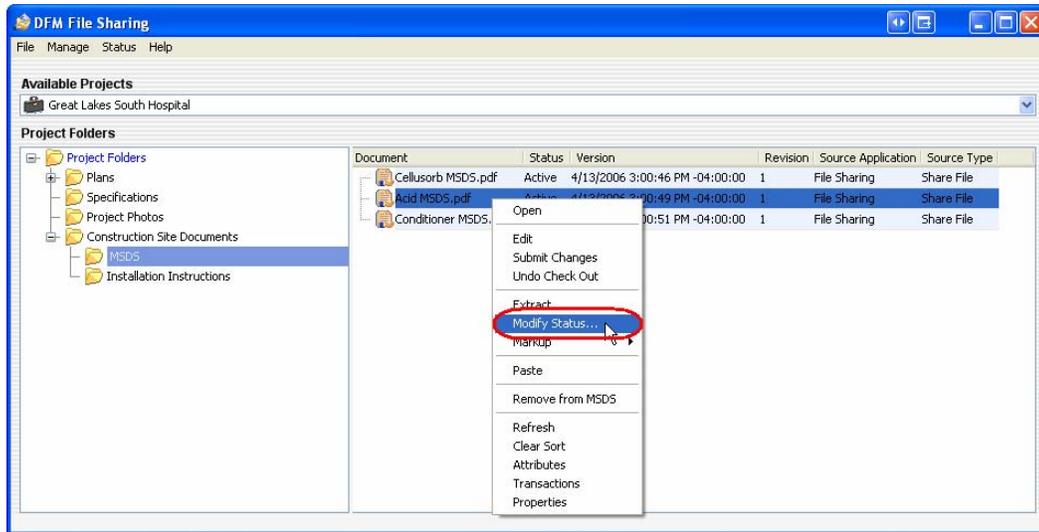


If you selected **Single**, a single ZIP file is uploaded into the folder you selected.

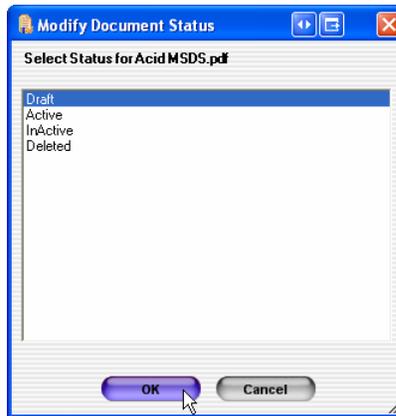
Modifying Document Statuses

You can modify the status of a document if you need to make a document **Active**, **Draft**, **Inactive**, or **Deleted**. (Depending on the DFS server, Inactive and Deleted may not be available.) You can modify multiple files at one time. Only Active documents are displayed on a web portal.

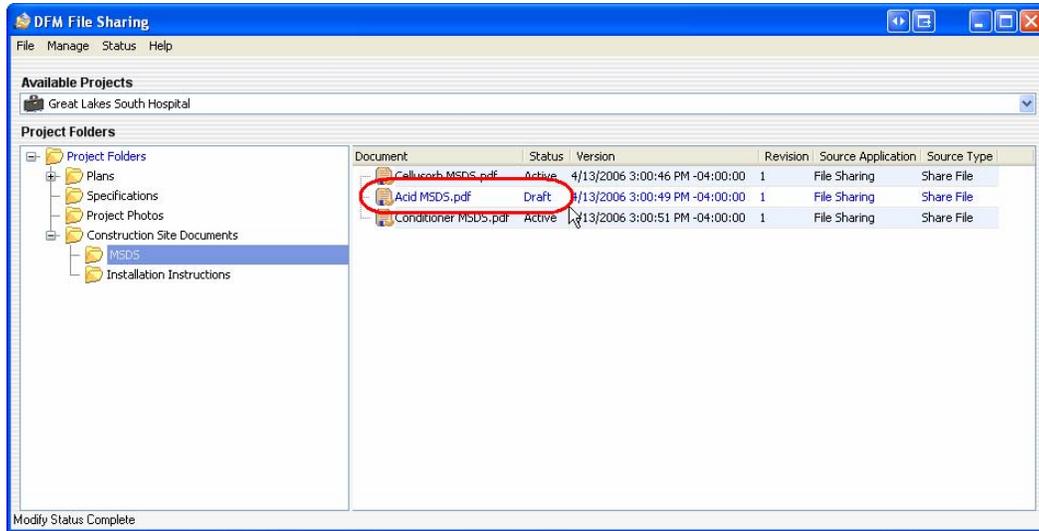
To modify the status of a document, right click on one or more documents and select **Modify Status**.



Select the **Status** that you want the document to be and click **OK**.



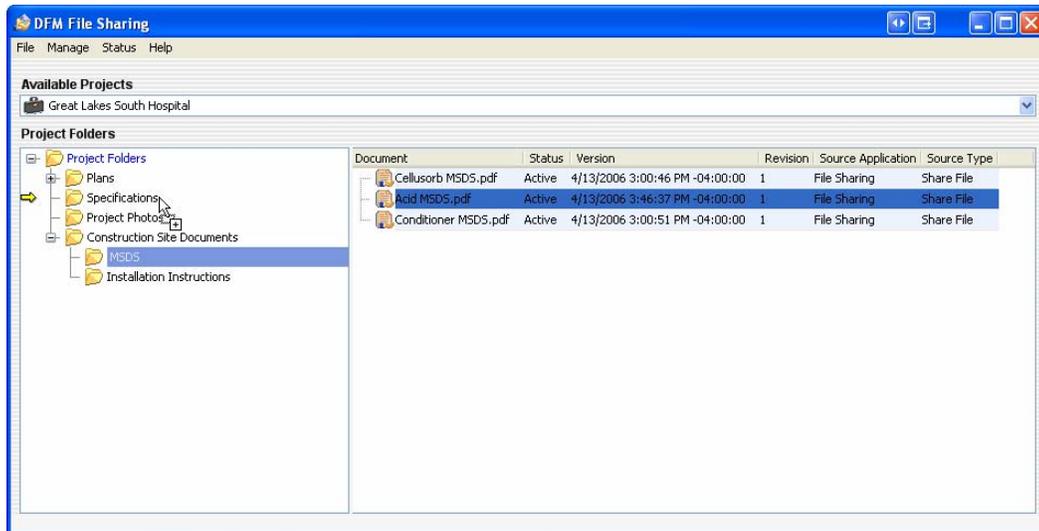
The document status is changed. **Draft** documents display in blue. **Inactive** and **Deleted** documents display in gray (or they may not display at all).



Copying Documents

You can copy documents from one folder to another. An important concept to know is that the same document can exist in multiple folders (although it really only exists once in the DFS Vault). If you make a change to a version of the document, the changes will be reflected in all folders in which that same version resides. For example, if you change version 1 of a document from Draft to Active, the change will be reflected in all the other folders that contain version 1 of the document.

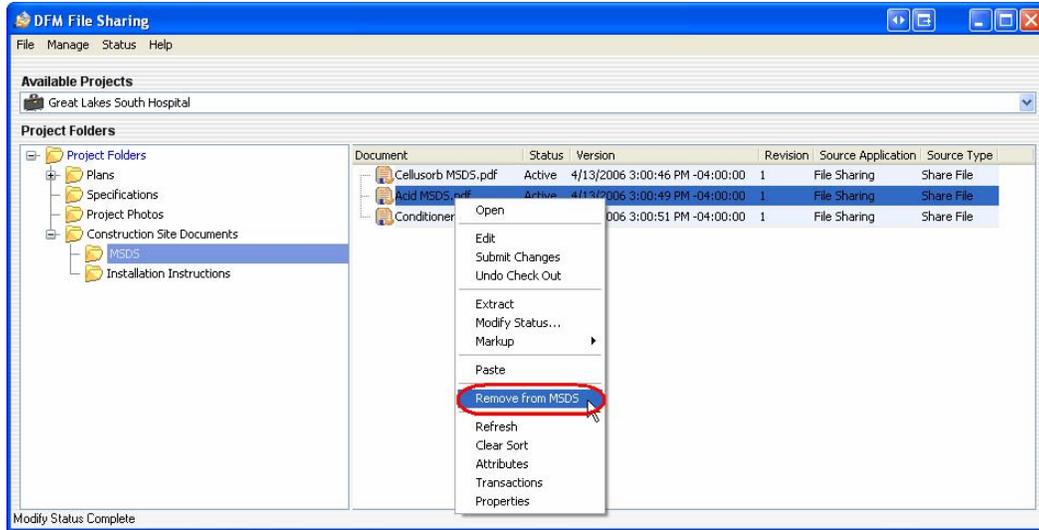
To copy a document from one folder to another, drag it to the new folder. A yellow arrow displays to show you the folder to which it will be copied.



Removing Documents

If you no longer need a file in a folder, you can remove it. Removing a document from a folder does not delete the document out of the DFS Vault; it simply removes it from the folder. If you remove a document that is only contained in one folder, you will not be able to access it with DFM File Sharing. The system administrator can restore the document using the administrator tools.

To remove a file or multiple files from a folder, right click on the file(s) and select **Remove From ...**

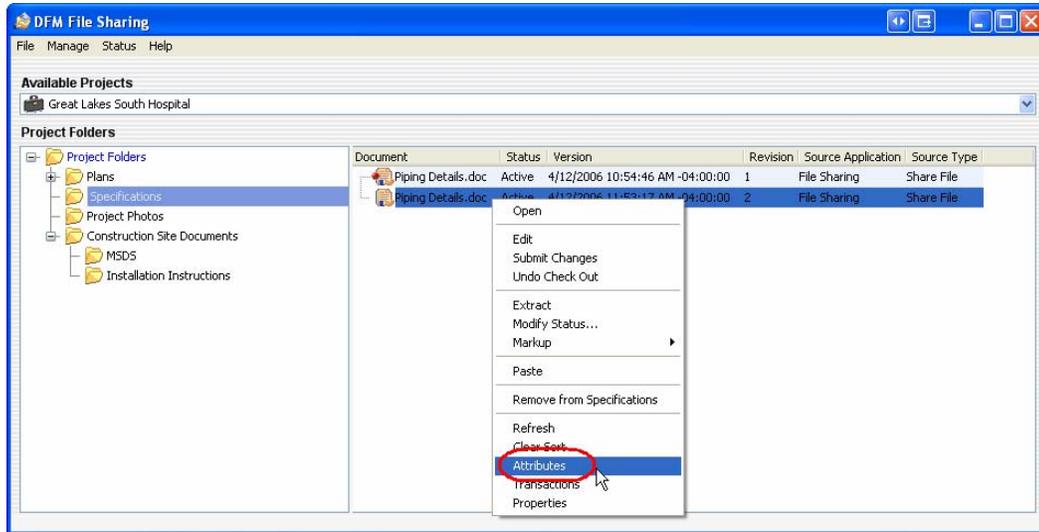


The document is removed from the folder.

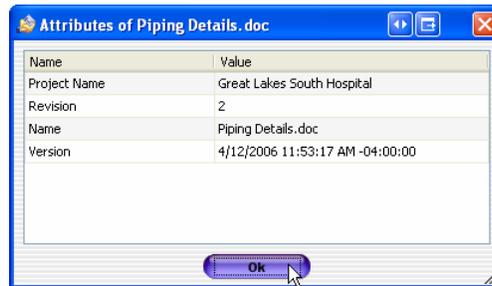
Viewing Document Attributes

You can view the attributes of a document.

To view a document's attributes, right click on the document and select **Attributes**.



The **Attributes** window displays all of the document's attributes.

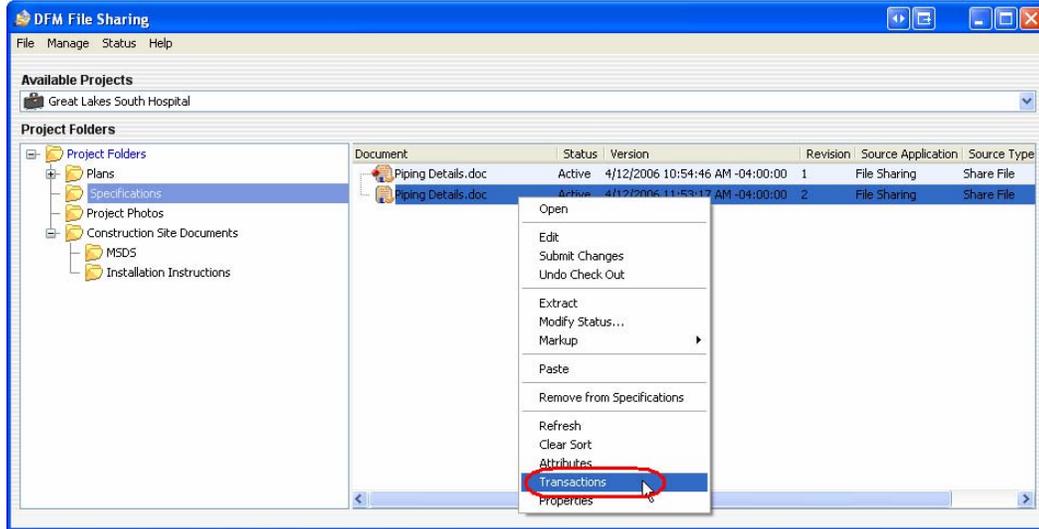


Click **OK** when finished.

Viewing Document Transactions

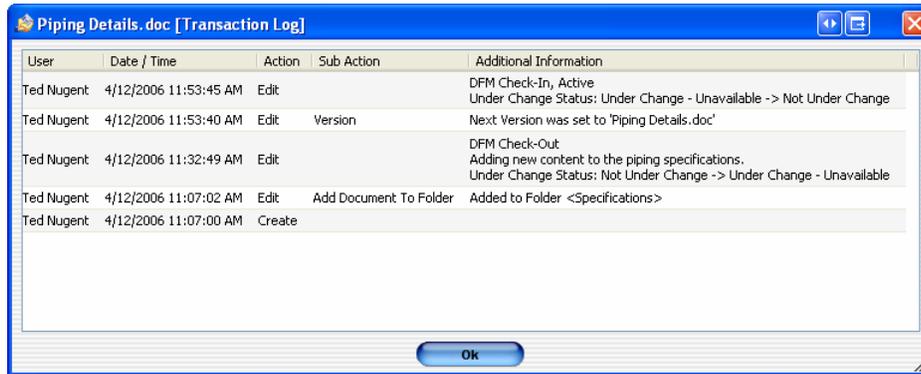
You are able to view all of the transactions that were made to a document, such as when it was added, when it was checked out, and under change comments. It will also tell you who performed the actions.

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



The **Transaction Log** displays all of the actions performed on the document.

Note: Transactions are stored for each version of the document.

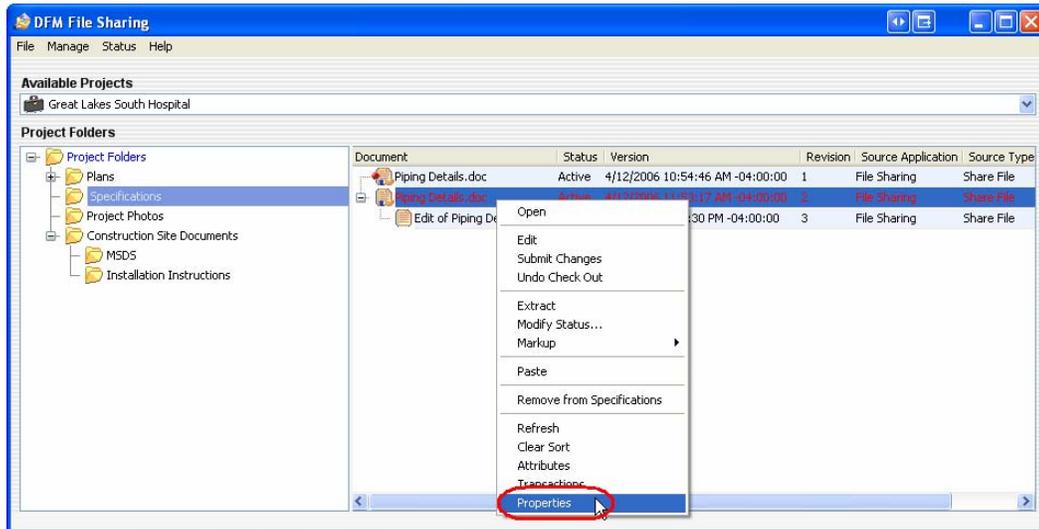


Click **OK** when finished.

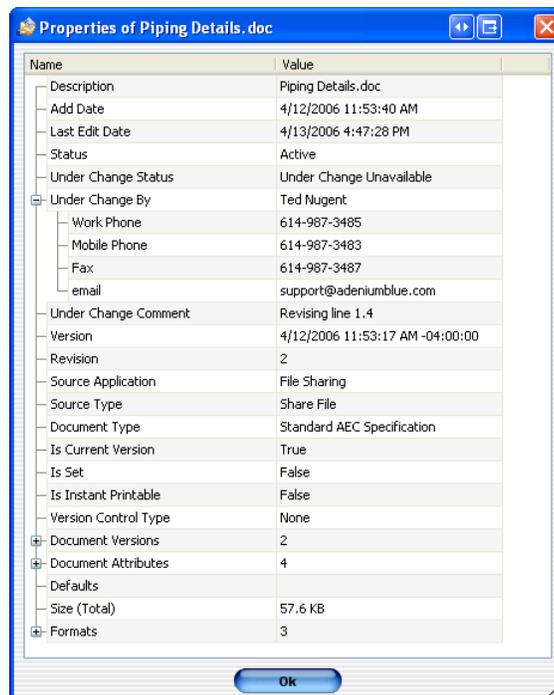
Viewing Document Properties

You can view detailed information about a document by viewing its properties. If you select a document that is under change (displayed in red), you can see who has it checked out. The **Last Edit Date** will tell you the date and time that person checked the document out.

To view a document's properties, right click on the document and select **Properties**.



The **Properties** window displays all of the detailed information about the document.



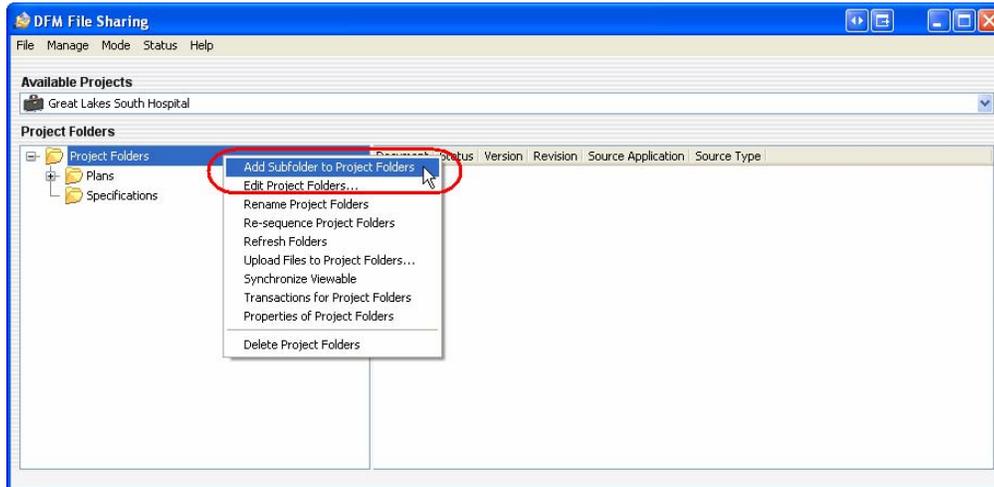
Click **OK** when finished.

FOLDER OPERATIONS

Adding a Subfolder

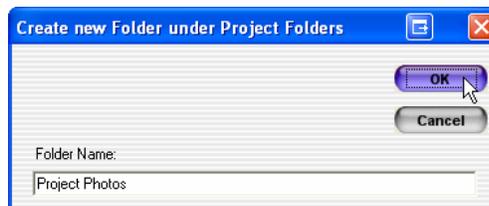
You can add subfolders to any folder in the folder tree.

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

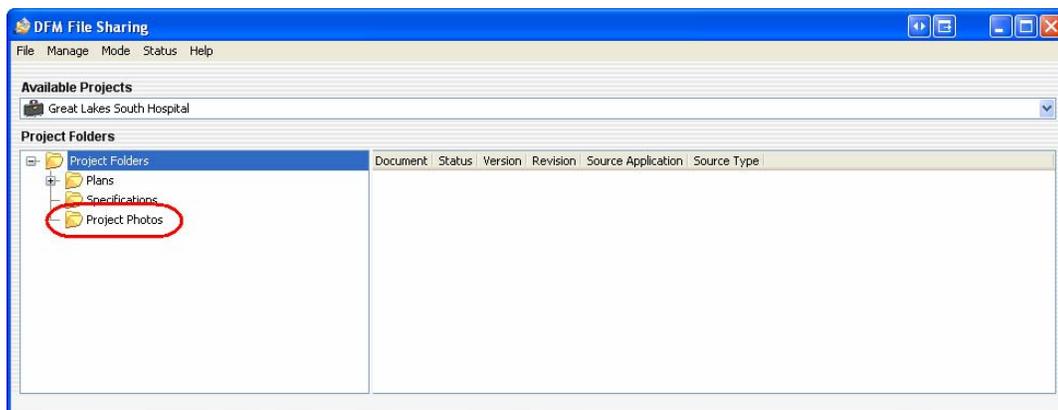


Enter the name of the folder in the **Folder Name** field and click **OK**.

Note: You cannot have multiple folders with the same name. This includes inactive and deleted folders that may not be displayed.



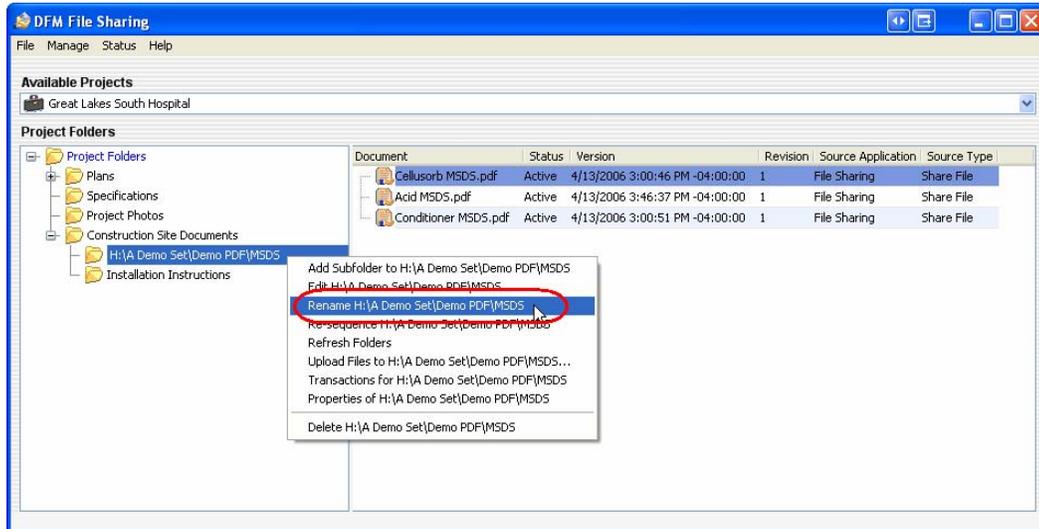
The folder is added.



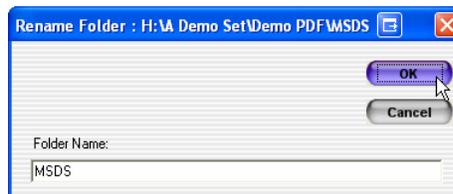
Renaming a Folder

You can rename folders. This is especially useful if you uploaded a folder and it has the original path as the name.

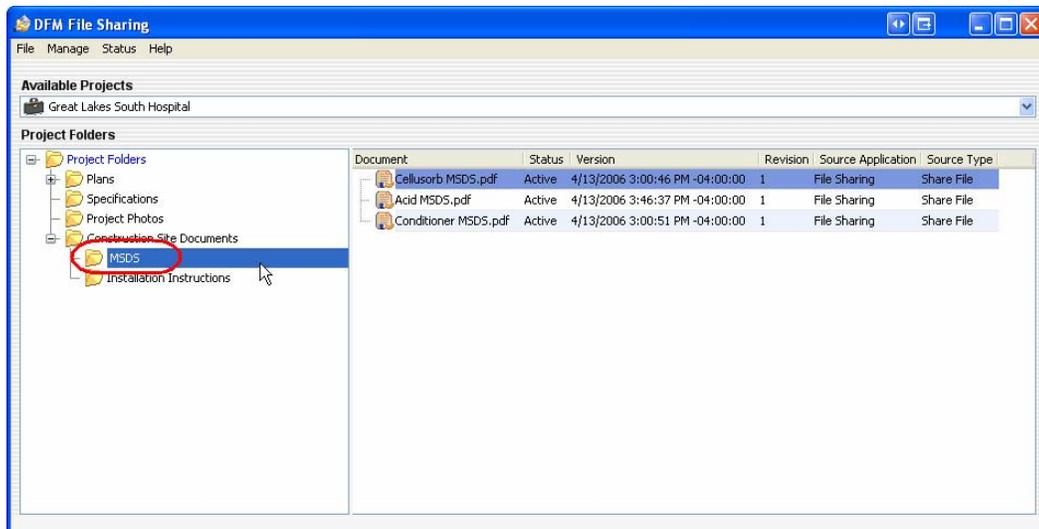
To rename a folder, right click on the folder and select **Rename <Folder Name>**. You can also select the folder and press **F2** on the keyboard.



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



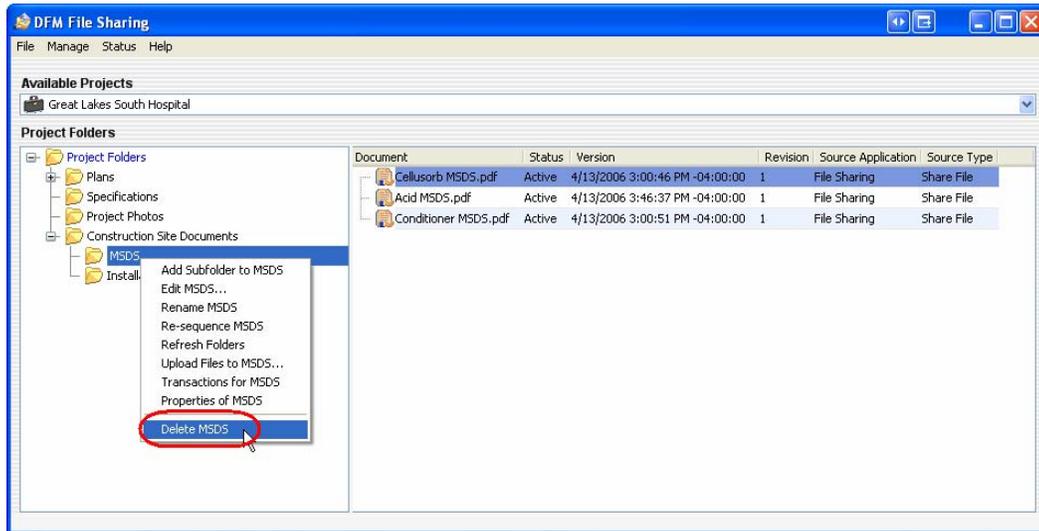
The folder is renamed.



Deleting a Folder

You can delete folders. By doing so, you are setting the Status to Deleted. The folder and its contents are not removed from the DFS Vault, but they are removed from File Sharing. If you accidentally delete a folder, it can be restored by a system administrator.

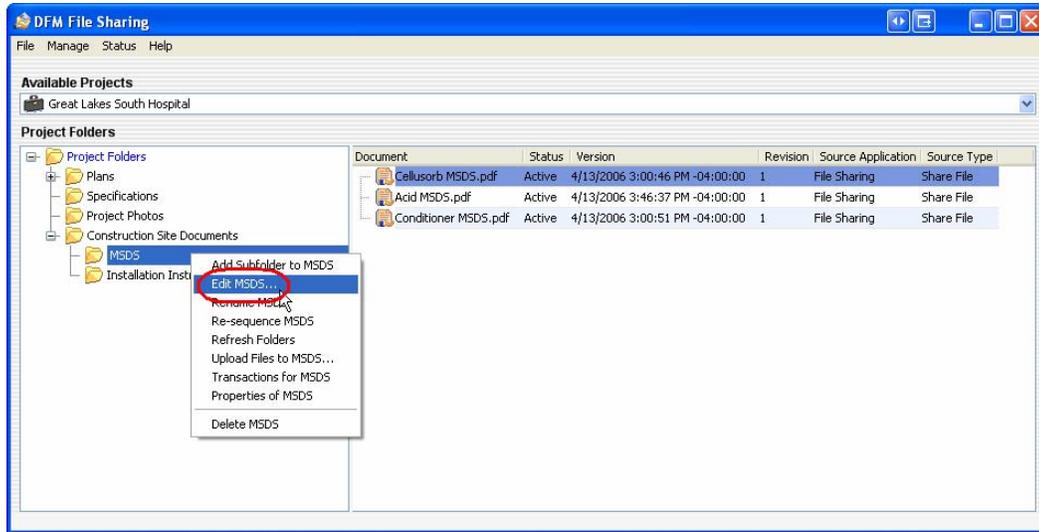
To delete a folder, right click on the folder and select **Delete <Folder Name>**.



Editing a Folder

You can edit a folder's Display Name, Status, and Content Change Style.

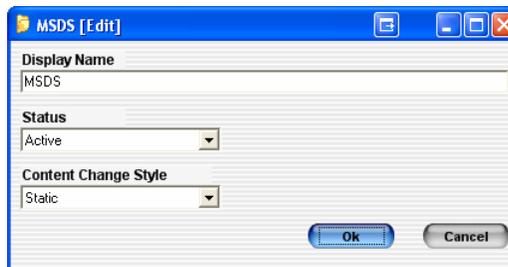
To edit a folder, right click on the folder and select **Edit <Folder Name>**.



You can change the name of the folder by entering a new **Display Name**.

You can change the **Status** to **Draft**, **Active**, **Under Change_Available**, **Under Change_Unavailable**, **Inactive**, or **Deleted**.

There are three possibilities for the **Content Change Style**: **Static**, **All Versions**, and **Current Version**. **Static** works like a normal windows folder. Only the documents you put in the folder are displayed. **All Versions** displays all versions of the document, both old versions and the current version. **Current Version** only displays the current version of a document.

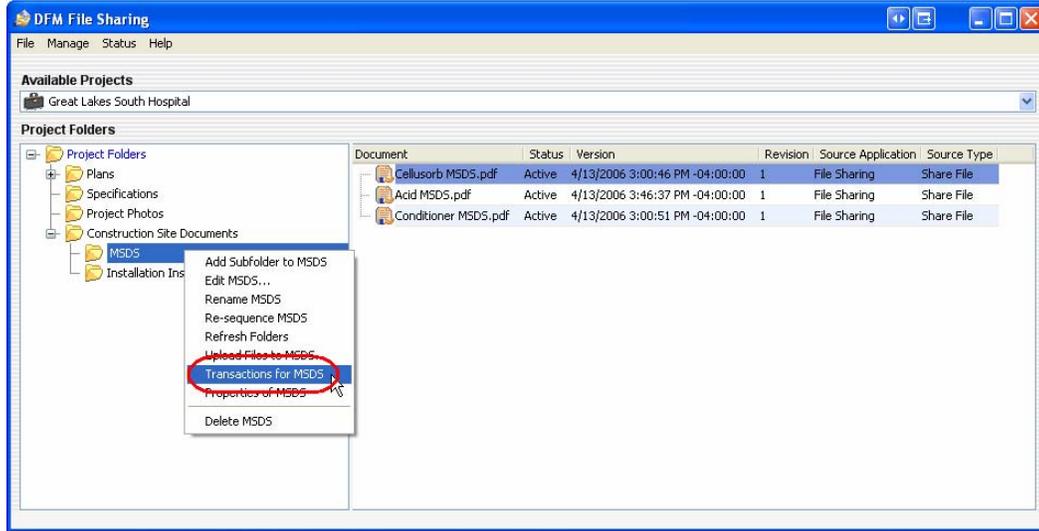


Click **OK** to save the changes.

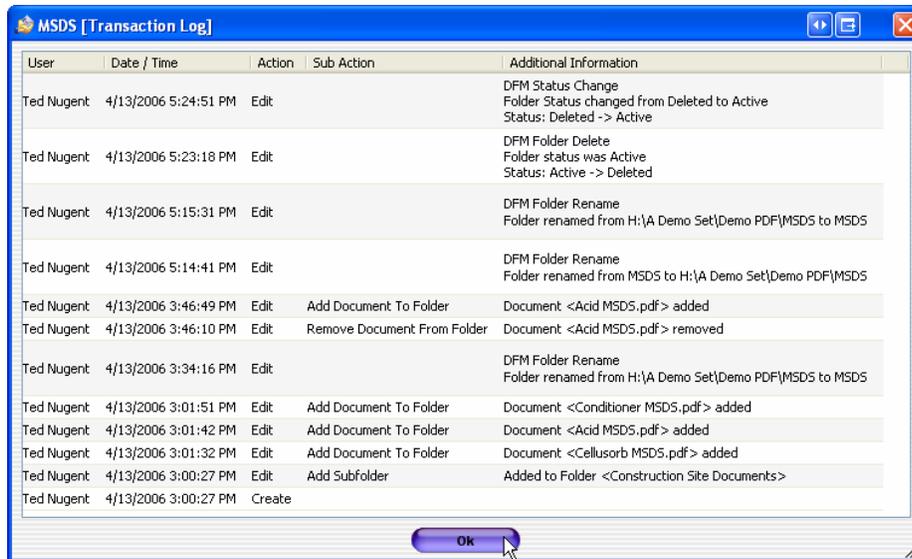
Viewing Folder Transactions

All actions performed on a folder are tracked. You can view all of the activity of a folder by viewing the transactions. It will display when it was created, if it was renamed, anything that was added to the folder, and who performed the action and when.

To view a folder's transactions, right click on the folder and select **Transactions for <Folder Name>**.



The **Transaction Log** displays all of the folder's activity.

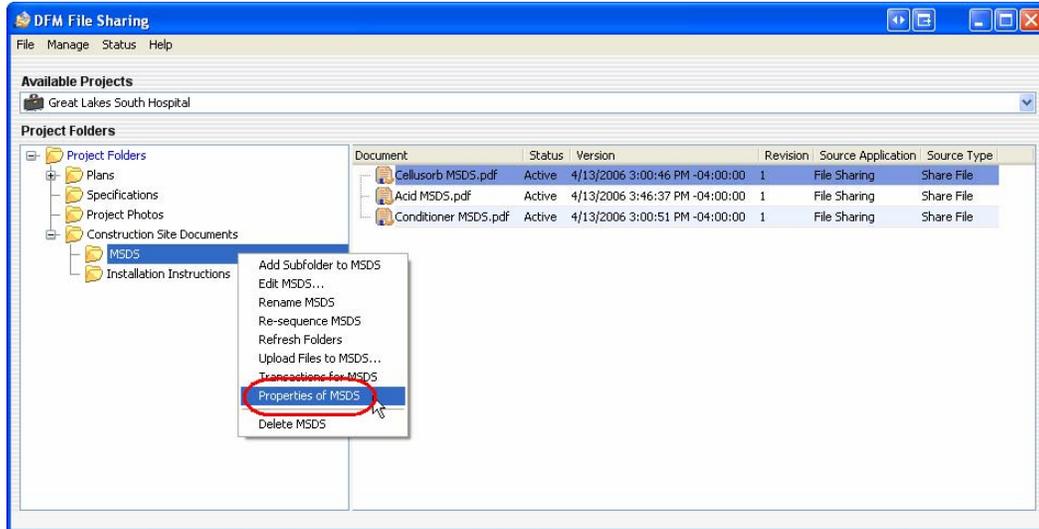


Click **OK** when finished.

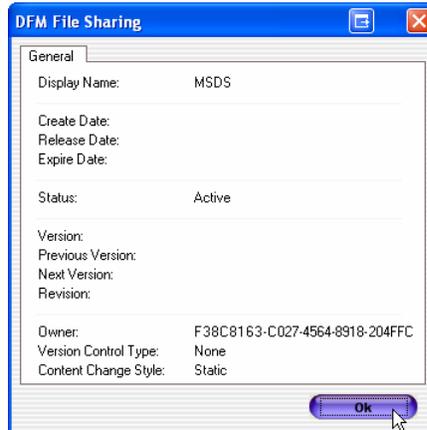
Viewing Folder Properties

You can view basic information about a folder by viewing its properties.

To view a folder's properties, right click on the folder and select **Properties of <Folder Name>**.



The properties window opens.



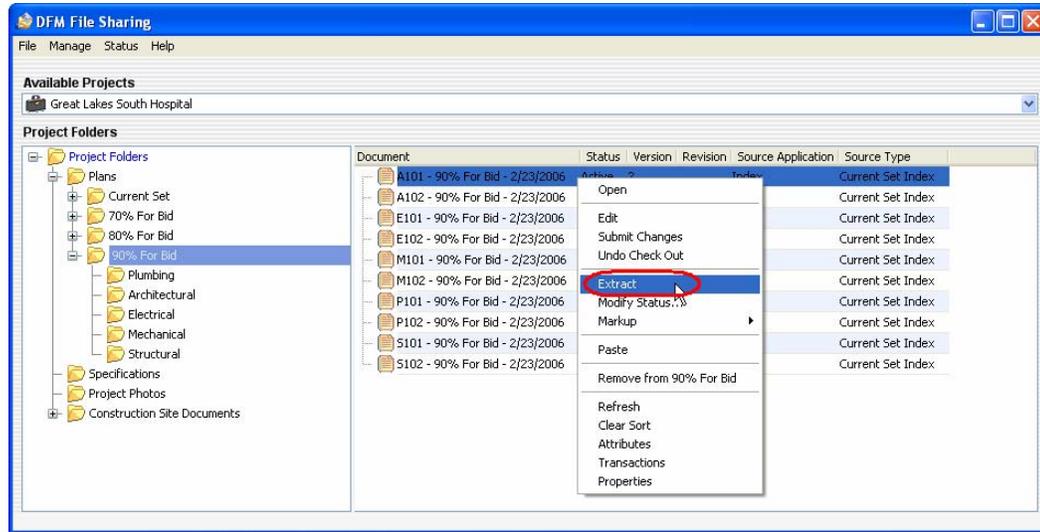
Click **OK** when finished.

MARKUP OPERATIONS

With DFM's markup capabilities, it is very easy to collaborate on documents. You can take a document and mark it up and then link it to the original as a markup version of the document. Then others can view the markup and make any necessary changes to the original file or make further comments.

Marking up a Document

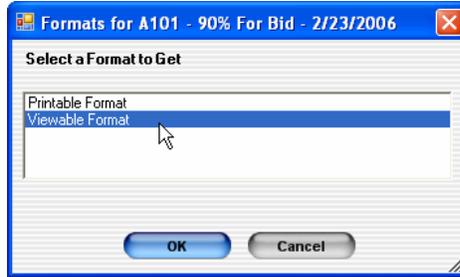
To create a markup, right click on the document that you want to markup and select **Extract**.



Select the location in which you want to place the document and click **OK**.



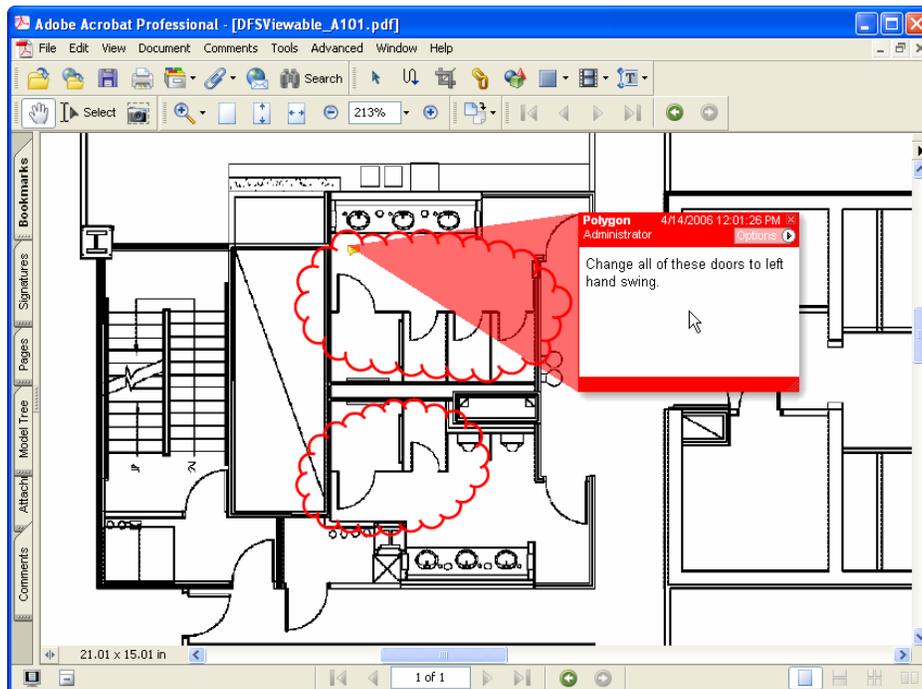
You may be asked which format of the document you would like to open. Select the format and click **OK**. (If the document was brought into the system through File Sharing, you will *not* receive this message. You only receive this message if the document was imported by a system administrator on the backend using advanced indexing tools.)



Click **Yes** to open the document.

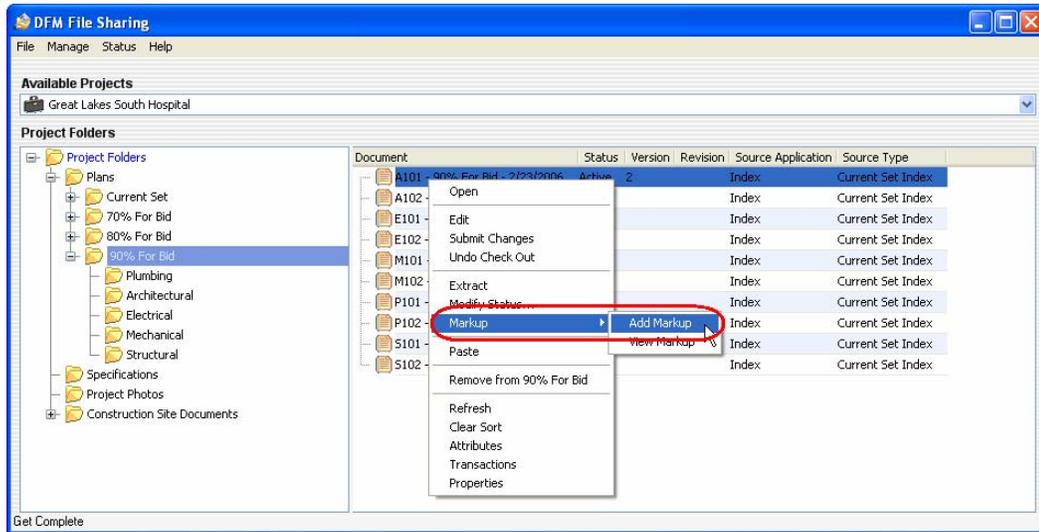


The document will open in the application that reads that particular file type. Markup the document using the tools in the application

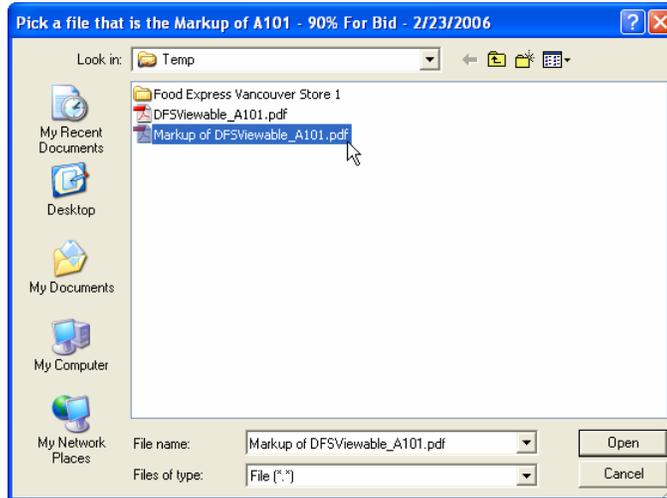


Save the document under a different name, such as "*Markup of <Document Name>*". Close the document.

In File Sharing, right click on the document and select **Markup > Add Markup**.



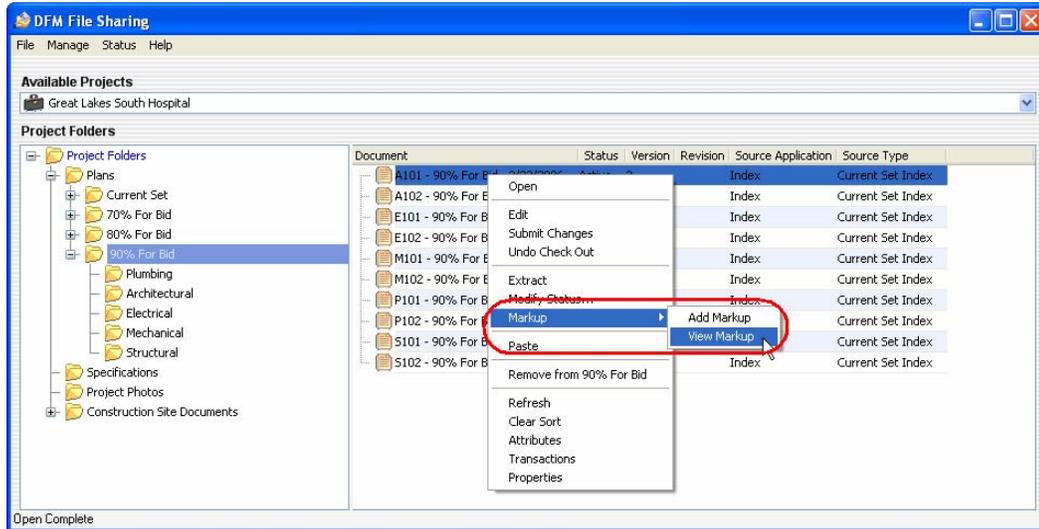
Browse to the marked up version of the document. Select it and click **Open**.



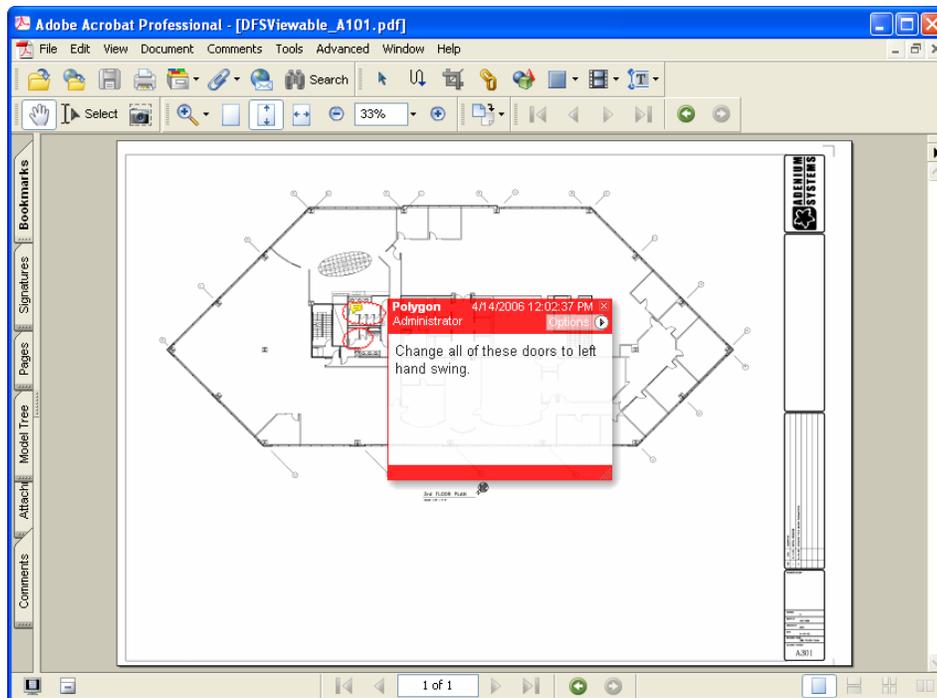
The markup is added.

Viewing a Markup

To view a marked up document, right click and select **Markup > View Markup**.



The marked up document opens.



ADVANCED CONFIGURATION

Setting Options

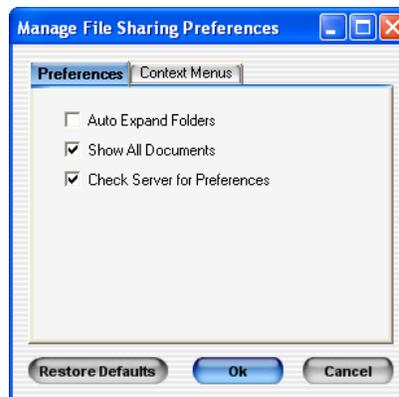
You can configure your File Sharing by setting the options.

To set the options, click the **Manage** menu and select **Options**. On the **Preferences** tab, do any of the following:

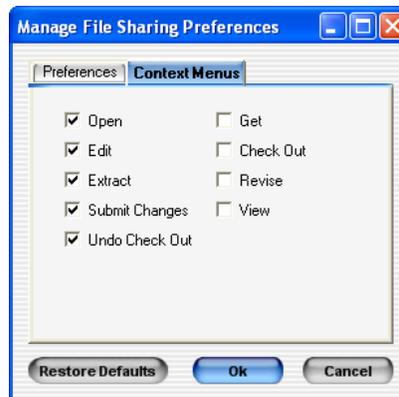
Click **Auto Expand Folders** to automatically expand all the folders in the folder tree. This is only recommended if your projects contain a small number of folders.

Click **Show All Documents** to show documents that were brought into the system with applications other than DFM, such as an administrator using an advanced indexing tool.

Click **Check Server for Preferences** to use the settings set by the system administrator on the server.



On the **Context Menus** tab, select the options that you want to display in the right click menu. The options are **Open**, **Edit**, **Extract**, **Submit Changes**, **Undo Check Out**, **Get**, **Check Out**, **Revise**, and **View**.



Click **OK** to save the changes.

APPENDIX

Keyboard Shortcuts

This is a list of keyboard shortcuts that are available in File Sharing.

Ctrl +A	Select All
Ctrl + V	Paste
F2	Rename Selected Folder
F5	Refresh
Esc	Clear Selection

Text Colors

This is a list of colors and what they represent in File Sharing.

Black	A document with a status of Active.
Green	A document with the status of Pending. These have been uploaded and are awaiting processing on the DFS Server.
Red	A document that is checked out and Under Change.
Blue	A document with a status of Draft. These are not available on a DFS web portal.
Gray	A document with a status of Inactive or Deleted.
Bold	A document that has been cached locally.



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