

Docushare Training

Log-In and Main Menu

Docushare can be found at
<http://Jlabdoc.jlab.org>

The screenshot shows the Xerox DocuShare website. At the top left is the logo "Xerox DocuShare®" and a search bar "Search the Entire Site". On the right, there are navigation links for "Advanced", "Guest", and "Login". Below the search bar is a navigation menu with "HOME" and "QUICK SEARCH". The main content area features a large image of a woman using a tablet, with the text "Publish & Share" overlaid. A blue callout box points to the login form, which includes fields for "Username", "Password", and "Domain: JLAB", along with a "LOGIN" button and a "Retain login for future" checkbox. Below the login form are links for "Forgot your password?" and "Contact your administrator.". To the left of the main content, there are sections for "COLLECTIONS" (listing "12 GeV Upgrade", "Facilities", and "Infrastructure") and "OTHER LINKS" (listing "Links to other content"). To the right, there is a "COMMUNITIES" section with "Workspaces", "Wikis", and "Weblogs".

Login using your
Jlab Username and
Password

Publish & Share

COLLECTIONS

Top level collections

12 GeV Upgrade

Documentation supporting CEBAF's 12 GeV Upgrade.

Facilities

Technology or research and development documentation and information generated by or related to the laboratory's major facilities.

Infrastructure

Documents related to the Laboratory's core administrative services.

OTHER LINKS

Links to other content

GETTING STARTED

Not sure what to do? [Take a Tutorial](#)

LOGIN

Username

Password

Domain: JLAB

LOGIN

Retain login for future

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

[Forgot your password?](#)

[Contact your administrator.](#)

COMMUNITIES

Explore our community areas

Workspaces

[See more](#)

Wikis

[See more](#)

Weblogs

[See more](#)



Main Menu After Login

Xerox DocuShare®

Search the Entire Site



Advanced



samuels

Logout

HOME

MY DOCUSHARE

MY TASKS

MY FAVORITES

QUICK SEARCH

RECENT

List of documents and collections on your network

List of documents routed by you or to you

List of documents favorited by you

Additional search options

Recently edited documents

GETTING STARTED

Not sure what to do? [Take a Tutorial](#)

COMMUNITIES

Explore our community areas

Workspaces

[See more](#)

Wikis

[See more](#)

Weblogs

[See more](#)

WHAT'S NEW

Lists all modified content. See what's new today!

Period...

COLLECTIONS

Top level collections

12 GeV Upgrade

Documentation supporting CEBAF's 12 GeV Upgrade.

Facilities

Technology or research and development documentation and information generated by or related to the laboratory's major facilities.

Infrastructure

Documents related to the Laboratory's core administrative services.

OTHER LINKS

Links to other content

My DocuShare

Your personalized DocuShare home page

Publish & Share

Document Upload and Editing



Document Upload

The screenshot shows the Xerox DocuShare interface. At the top left is the logo "Xerox DocuShare®" and a search bar "Search this Collection". Below this is a navigation bar with links: HOME, MY DOCUSHARE, MY TASKS, MY FAVORITES, QUICK SEARCH, and RECENT. A breadcrumb trail is highlighted with an orange box: "Location: Home \ ... \ SRF Institute \ 01 - SRF Projects \ 01 - Open \ 1.04.80.014 - P1 Refurbishment (Tony Reilly) \ 06 - Process Documents and Travelers (P1- refurb) \ Approvals Listing". Below the breadcrumb is a folder icon and the title "Approvals" with the subtitle "Place holder for documents going through approval". A "Edit Selected..." dropdown menu is open, showing options: Add..., Calendar, Collection, Discussion, Document (checked and highlighted with an orange box), Weblog, and Wiki. Two blue callout boxes provide instructions: one points to the breadcrumb trail with the text "Go to the collection the document is meant for", and another points to the "Document" option in the dropdown with the text "Use the Drop Down under 'Add' and select 'Document'".

Document Upload Cont.

Add Document

Add Document By: Uploading a document now

Uploading a document later

Filename: No file selected.

Title: UPDATE WITH FILENAME

Summary:

Description:

B I U S A

Keywords:

Expiration Date: mm/dd/yyyy hh mm

Max Versions: (required)

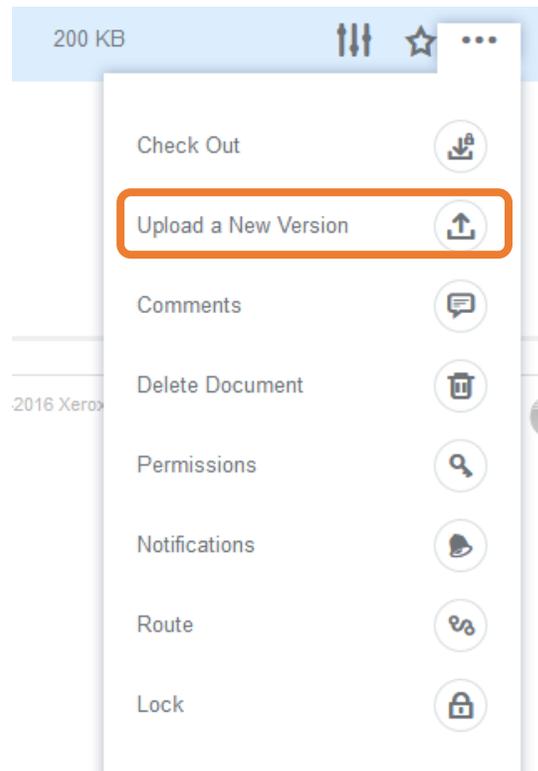
Author (enter usernames):

Browse to select a document to upload

- Document title automatically created from filename
- Use Traveler/Procedure title for the Document Summary

Upload a New Version

**From the More Actions Section, select
Upload a New Version**



Add Version

Filename: No file selected.
(required)

Title:
(required)

Change the title of the document to this title

Version Comments:

Add comments on
the new version, if
applicable

APPLY



More Actions

Select More Actions to open the drop-down

Navigation bar showing document title **P1-TRAIN-STUFF-R1.docx**, user **samuels**, date **09/17/21**, size **200 KB**, and icons for list view, star, and a highlighted drop-down menu.

P1-TRAIN-STUFF-R1.docx
Version 1

- View
- Edit
- Permissions
- Notifications
- Locations
- Version History
- Comments (0)
- Routing
- Change History

View Properties

Title: **P1-TRAIN-STUFF-R1.docx**
Summary:
Description:
Keywords:
Handle: Document-248214
Owner: **Allen Samuels (User-2008, samuels:JLAB) DS**
Create Date: Friday, September 17, 2021 11:36:43 AM EDT
Modified Date: Friday, September 17, 2021 11:36:43 AM EDT
Modified By:
Expiration Date: Monday, September 20, 2021 12:00:00 AM EDT
Locked By:
Abstract:
Add Versions: Allowed
Author (enter usernames):
Content Type: Microsoft Word (.docx) - application/vnd.openxmlformats-officedocument.wordprocessingml.document
Document Classification: Other
File name: P1-TRAIN-STUFF-R1.docx
Is Placeholder: No
Keyword1:
Keyword2:
Keyword3:
Lessons Learned:

- Temporarily lock document from edits until you check a new version back in
- Uploading does not overwrite old version. A record is kept
- Deletes the document
- Adds the item to your favorites page
- Routes the document for approval
- Locks the document from others using it (not necessary to select when checking out)
- Views the document in browser without downloading

- Check Out
- Upload a New Version
- Delete Document
- Add to Favorites
- Route
- Lock
- View in HTML

IMPORTANT
Only authorized persons should be routing documents for approval

Select Properties to view Document Information

Document Properties

  **P1-TRAIN-STUFF-R1.docx** NEW samuels 09/17/21 200 KB  ☆ ...

- View the document details
- Edit document details
- Edit permissions to view and edit document
- Add or remove notifications for documents
- Document locations
- Version history
- Document comments
- View routing status
- View and change document history

 **P1-TRAIN-STUFF-R1.docx**
Version 1

- View
- Edit
- Permissions
- Notifications
- Locations
- Version History
- Comments (0)
- Routing
- Change History

View Properties

Title: [P1-TRAIN-STUFF-R1.docx](#)
Summary:
Description:
Keywords:
Handle: Document-248214
Owner: [Allen Samuels \(User-2008, samuels:JLAB\)](#) 
Create Date: Friday, September 17, 2021 11:36:43 AM EDT
Modified Date: Friday, September 17, 2021 11:36:43 AM EDT
Modified By:
Expiration Date: Monday, September 20, 2021 12:00:00 AM EDT
Locked By:
Abstract:
Add Versions: Allowed
Author (enter usernames):
Content Type: Microsoft Word (.docx) - *application/vnd.openxmlformats-officedocument.wordprocessingml.document*
Document Classification: Other
File name: P1-TRAIN-STUFF-R1.docx
Is Placeholder: No
Keyword1:
Keyword2:
Keyword3:
Lessons Learned:

Document Approval



Approval Email

If a Document is sent to you for approval, you will receive an email

You have a new DocuShare document routing task:

Subject: P1-TRAIN-STUFF-R1.docx

Date: 09/17/2021 15:26:48

To view your pending document routing tasks, click on the link below to login to DocuShare:

https://jlabdoc.jlab.org/docushare/dsweb/routing/routing_email.jsp?url=request_base.jsp&routingSlipRequestID=21667&workFlowJobName=21662

Link to the approval



Approving a Document

For Your Approval

From: Allen Samuels
Subject: P1-TRAIN-STUFF-R1.docx
Date: Friday, September 17, 2021 03:26:48 PM EDT

Download and view routed documents

Type	Title	Actions
	P1-TRAIN-STUFF-R1.docx	  

Comments:

B I U    

Comments on the document go here

Save as private

Save comments **Approve or Disapprove**

ViewRouting

General Routing Status

Date of last action on routing

Routing

Description
P1-TRAIN-STUFF-R1.docx

Owner
samuels

Status
Approved

Date
09/17/21

View detailed routing status

My Tasks

Report on Routing for Approval

From: DocuShare Document Routing Service
Subject: Re: P1-TRAIN-STUFF-R1.docx
Date: Friday, September 17, 2021 03:26:48 PM EDT

Type	Title	Actions
	P1-TRAIN-STUFF-R1.docx	

Status: Approved

Recipient	Response	Date	Added Versions	Response Versions
Step 1: Approval, 100% respond				
Allen Samuels	Approved	09/17/21	-	1 (Version-136256)

Approver

Response and response date

Delete/terminate routing (if you created it)

Keep for Later

Delete This Job

Overdue Documents and What Happens

- When a Traveler or Procedure is overdue, an email will be sent to the approvers and routers if the options are selected.

You have a new DocuShare document routing task:

Subject: C100R-CAV-RFIN-R2.docx

Date: 10/14/2021 00:00:07

Step 1 OVERDUE: 10/13/2021

To view your pending document routing tasks, click on the link below to login to DocuShare:

https://jlabdoc.jlab.org/docushare/dsweb/routing/routing_email.jsp?url=report_base.jsp&reportType=ForApprovalOverdue&routingSlipRequestID=21808¬ifyID=21822&workFlowJobName=21808

My Tasks

Xerox DocuShare®

Search the Entire Site

- HOME
- MY DOCUSHARE
- MY TASKS**
- MY FAVORITES
- QUICK SEARCH
- RECENT

My Tasks

View Page 1 of 25

Tasks Assigned to Me

Description	Type	Date
L2HE-PR-CLNRM-NEG-PREP-R1.docx	Step 1 Completion	12/09/21
L2HE-PR-CLNRM-GV2SA-ASSY_R1.docx	Step 1 Completion	12/09/21
L2HE-PR-CLNRM-GV2SA-ASSY_R1.docx	Step 1 OVERDUE	12/08/21
L2HE-PR-CLNRM-NEG-PREP-R1.docx	Step 1 OVERDUE	12/08/21
L2HE-PR-CLNRM-GV1SA-ASSY-R1.docx	Step 1 Completion	12/07/21
L2HE-INSP-CAV-R4.docx	Step 1 Completion	12/06/21
L2HE-INSP-CAV-R4.docx	Step 1 OVERDUE	12/04/21
C50R-CM-CMTF-ACTS-R2.docx	Step 1 Completion	12/03/21
L2HE-CLNRM-CAV-ASSY1-R3.docx	Step 1 Completion	12/03/21

Name of documents routed

Date modified and status

Thank You For Listening

Questions?

Additional questions or concerns can be directed to pansophy@jlab.org

