



DocFactory

SMARTSHARE

Quick Guide

Contents

GETTING STARTED	4
LOGGING IN FOR THE FIRST TIME	4
OPEN A FILE IN SMARTSHARE	4
ADD A FILE TO SMARTSHARE	5
UPDATE A FILE IN SMARTSHARE	6
UPDATING MULTIPLE FILES IN SMARTSHARE	6
SHARE A FILE WITH OTHER USERS	6
ORGANIZE FILES	7
ADD TAGS TO A FILE	7
GALLERY OR LIST VIEW	7
ADD OR CHANGE THE SUMMARY TEXT	8
CHANGE SMARTSHARE REPOSITORY IN THE WINDOWS CLIENT	8
UPDATE THE WINDOWS SMARTSHARE CLIENT	8
GETTING HELP	8
MY PROFILE	10
ACCESS THE PROFILE PAGE	10
SET THE PROFILE PICTURE AND YOUR DISPLAY NAME	10
E-MAIL SETTINGS	10
SHARING	11
SHARE A FILE WITH OTHER USERS	11
SHARE A FILE WITH ANONYMOUS USERS	11
SHARE A FILE WITH EVERYONE	12
STOP SHARING	12
REMOVE A USER OR GROUP FROM SHARING A FILE	12
CHANGE OWNER OF A FILE	12
WHAT DO I SHARE WITH ANOTHER USER OR GROUP?	13
TAGS	14
ADD TAGS TO A FILE	14
REMOVE TAGS FROM A FILE	14
FILTER USING TAGS	15
SEARCH FOR TAGS	15
ORGANIZE	16
OPEN THE ORGANIZER	16

ADD FACET VALUES TO A FILE	16
REMOVE FACET VALUES FROM A FILE	17
CREATE A NEW FACET	17
CREATE A NEW FACET VALUE	17
CHANGE ORDER OF FACETS	18
SPOTLIGHT FACET VALUES	18
DELETE FACETS	19
DELETE FACET VALUES	19
SET FACET SECURITY	19
SEARCH	22
SEARCH TEXT	22
SEARCH FACETS	22
SEARCH TAGS	23
HISTORY	24
ACCESS FILE HISTORY	24
ACCESS A HISTORY ENTRY	24
SPOTLIGHT	25
ADD A FILE TO THE SPOTLIGHT PAGE	25
REMOVE A FILE FROM THE SPOTLIGHT PAGE	25
SPOTLIGHT FACET VALUES	25
INSTANT MESSAGING	27
WINDOWS CLIENT ONLY	27
SEND AN INSTANT MESSAGE	27
RECEIVE AN INSTANT MESSAGE	27
DISCUSSIONS	29
CREATE A DISCUSSION ENTRY	29
PEOPLE	30
WINDOWS CLIENT ONLY	30
ACCESSING THE PEOPLE VIEW	30
ACCOUNT OPERATORS	30
DISPLAY USER OR GROUP DETAILS	30
CREATE A NEW USER	31
CREATE A NEW GROUP	32
ADD MEMBERS TO A GROUP	32
CONNECT A USER TO A GROUP	33

ASSIGN GROUP ADMINISTRATORS	33
ACTIVATE OR DEACTIVATE A USER OR GROUP	33
REMOVE A USER OR GROUP	34
FIND A USER OR A GROUP	34
FILTER USERS AND GROUPS	34
SHOW SHARED TOPICS	35
SEND AN INSTANT MESSAGE TO A USER	35
SEND AN E-MAIL TO A USER OR GROUP	35
INVITATIONS	36
<hr/>	
WINDOWS CLIENT ONLY	36
CREATE A USER INVITATION	36
REMOVE INVITATIONS	37
RE-SEND INVITATIONS	37
DISPLAY INVITATION STATUS	37
WEB ACCESS	38
<hr/>	
COPY WEB LINK	38
OPEN IN WEB BROWSER	38

Getting Started

Thank you for using SmartShare, a smarter way of information management and information sharing.

Logging in for the first time



When you start SmartShare, the SmartShare sign in window is displayed. To sign in to SmartShare:

1. Enter your user name in the **User name** text box.
2. Enter your password in the **Password** text box.
3. Click on the sign in arrow to the left of the **Password** text box or press **ENTER** on the keyboard.

You are signed in to SmartShare. The **Spotlight** Page is displayed showing information users has added to the Spotlight page and shared with you.

In the sign in window you may check the **Remember my password** check box to enable automatic signing in (only in the Windows client) when SmartShare is started.

When signed in to SmartShare you should update your profile page, see *My Profile*.

Open a file in SmartShare

To open a file in SmartShare:

1. In the Windows client, double-click on the file or select the file and press **Enter** on the keyboard. In the Web client, click on the right mouse button and select **Open** or double-click on the file. Click on the topic icon or the **Download** button to open the file.

The file is opened in the associated software on your computer.


Note: The file is opened in read-only mode. To change the file, save the file to your file system and make the desired changes. To import the changed file to SmartShare again, drag the saved file in your file system to SmartShare.

Add a file to SmartShare



To add a file to SmartShare:

Import via import topics

1. In the Windows client, select **File – Import topics**. In the Web client, click on the import button  in the Web interface.
2. Select the files you want to import to SmartShare.
3. Click on the **OK** button.
4. Set the desired facet values, tags, contributors or readers in the import dialog.
5. Click on the **OK** button.

The file is imported to SmartShare and you can now share the file with other SmartShare users.

Import via drag and drop

1. Select the file in your file system or network.
2. Drag the file to SmartShare and drop the file in SmartShare. In the Web client, drag and drop is supported if you are running Google Chrome or Safari.

Note: You cannot drop a file on the Spotlight page.

3. Set the desired facet values, tags, contributors or readers in the import dialog.
4. Click on the **OK** button.

The file is imported to SmartShare and you can now share the file with other SmartShare users.

Tip! The imported file will inherit any selected facet values, tags or sharing information already selected in SmartShare.

Update a file in SmartShare

To update a file in SmartShare:

1. Select the file in SmartShare.
2. In the Windows client, drag the file to your file system or your network. The file is saved at the location where you dropped the file. In the Web client, open the file and click on the Download button and save the file to your file system or your network.
3. Edit and save the file in the desired software.
4. Drag the file from the file system or the network to SmartShare and at the same time press the **CRTL** key on your keyboard and drop the file on the file in SmartShare you want to replace (only available in the Windows client). You can also use the **Replace** function by selecting the file you want to replace and click on the right mouse button and select **Replace**.

A new version of the file is imported to SmartShare. The **History** of the file is updated with a new entry indicating that the file has been updated.

Updating multiple files in SmartShare

In the Windows client, multiple files can be updated simultaneously. To update multiple file:

1. Select **File – Replace topics**.
2. Select the files to update in your file system or on the network.
3. Click on the **Open** button.
4. A dialog is displayed where the files are analysed. Files which are identified to already exist in SmartShare are identified as replacable.
5. Click on the **Replace** button.

A new version of the file is imported to SmartShare. The **History** of the file is updated with a new entry indicating that the file has been updated.

Share a file with other users

To share a file with other users in SmartShare:

1. Select the file you want to share. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Sharing – Add Reader** or **Sharing – Add contributor**.

3. In the **Reader** or **Contributor** dialog box, enter the names of the users or user groups you want to share the file with. When typing in the dialog box, matching names will appear in the popup window. Multiple names can be entered separated by ;
4. Press the **ENTER** key on the keyboard to share the file.

The file is shared with the users and will appear in their SmartShare client. The name of the user or the user group will be displayed in the **Sharing** area in SmartShare.

Note: Sharing as **Reader** means that the user only can read the file and add discussion entries on the file. Sharing as **Contributor** means that the user can change the file, add readers to the file and add discussion entries on the file.

Organize files

To organize files using facet values:

1. Select the file you want to organize. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Organize**. The Organize dialog is displayed.
3. Select the facet values which shall be connected to the file(s).
4. Click on the **OK** button.

The facets values are assigned to the file(s) and are available in the **Facets** area in SmartShare.

Add tags to a file

To add tags to a file:


1. Select the file you want to add tags to. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Add tag** or press **CRTL+T** on the keyboard.
3. In the **Tag** dialog box, enter the desired tags. When typing in the dialog box, already defined tags matching the expression will appear in a popup window. Multiple tags can be entered separated by ;
4. Press the **ENTER** key on the keyboard to assign the tags.

The tags are assigned to the file and are available in the **Popular Tags** area in SmartShare.


Gallery or List view

In SmartShare, the list of files can be displayed either in List view or in Gallery view.

To display files in Gallery view:

1. Click on the  button to the right in the SmartShare header bar.

To display files in List view:

1. Click on the  button to the right in the SmartShare header bar.

Add or change the summary text

To add or change the summary text connected to a file:

1. Select the file in SmartShare.
2. In the Windows client, click on the right mouse button and select **View Details** or press **ALT+RETURN** on the keyboard.
3. Select the **Overview** tab.
4. In the **Summary** section, click in the **Edit** link.
5. Enter your summary text in the text box.
6. Click on the **Save** button.
7. In the Web client, click on the right mouse button and select **Open** or double-click on the file.
8. Click on the **Edit summary** link.
9. Enter your summary text in the text box.
10. Click on the **Save** button.

The new summary text is indexed and added to the file.

Change SmartShare repository in the Windows client

Your Windows SmartShare client may have access to more than one SmartShare repository. SmartShare can only be connected to one SmartShare repository simultaneously, but you can switch between SmartShare repositories.

To switch to another SmartShare repository:

1. If you are signed in, sign out of SmartShare. Select **File – Sign out**.
2. Click on the **Repository** pull down menu to select another SmartShare repository or enter the web address to the SmartShare repository you want to access in the **Repository** field.
3. Enter your user name and password and sign in to the selected SmartShare repository.

Update the Windows SmartShare client

SmartShare implements automatic updates. During the signing in process, SmartShare will identify if a new updated version is available. If a new updated version is available, SmartShare will inform you that a new updated version is available and you must upgrade SmartShare.

Follow the instructions in the SmartShare client to upgrade SmartShare.

Getting help

In the Windows client, you can access the SmartShare Web site by selecting **Help – SmartShare Help** or pressing **F1** on the keyboard. The SmartShare Web site is also available at <http://www.docfactory.com/smartshare>.

In the Web client, you can access the SmartShare Web site by clicking on the **Learn more** menu.

You can access the latest release notes by selecting **Help – Release notes**. The release notes are also available at <http://www.docfactory.com/smartshare/new.aspx>.

Support questions, bug reports or improvement suggestions are sent to support.docfactory@sigmakudos.com.

My Profile



Access the profile page

To access the profile page:

1. In the Windows client, select **View – My profile**. In the Web client, click on your **User name** located at the top-right in the user interface.

Your profile page is displayed in SmartShare.

Set the profile picture and your display name

To set your profile picture and your display name:

1. Open your profile page.
2. Click on the **Change picture** button.
3. Select your profile picture.
4. Enter your desired display name in the **Display name** text box.
5. Click on the **Save** button.

Your new profile picture and your display name are set in SmartShare.

E-mail settings

In **My Profile** you can configure e-mail setting. Configure your personal settings by checking or unchecking the e-mail settings check boxes.

Sharing



Share a file with other users

To share a file with other users in SmartShare:

1. Select the file you want to share. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Sharing – Add Reader** or **Sharing – Add contributor**.
3. In the **Reader** or **Contributor** dialog box, enter the names of the users or user groups you want to share the file with. When typing in the dialog box, matching names will appear in the popup window. Multiple names can be entered separated by ;
4. Press the **ENTER** key on the keyboard to share the file.

The file is shared with the users and will appear in their SmartShare client. The name of the user or the user group will be displayed in the **Sharing** area in SmartShare.

Note: Sharing as **Reader** means that the user only can read the file and add discussion entries on the file. Sharing as **Contributor** means that the user can change the file, add readers to the file and add discussion entries on the file.

Share a file with anonymous users

Activating the group **Anonymous** enables public access to all files shared with the group. Users do not need to login to SmartShare to access files shared with this group. This is handy if certain files shall be public available.

If you want to share files with anonymous users, share the file with the group **Anonymous**.

Note: The group Anonymous is default de-activated in SmartShare.

Share a file with everyone

If you want to share files with everyone, share the file with the group **Everyone**.

Note: The group **Everyone** can be de-activated to prevent sharing with everyone.

Note: If you share files with **Everyone**, you also share the files with the group **Anonymous** if the group is activated.

Stop sharing

To stop sharing a file:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Sharing – Stop Sharing** or in the Windows client, press **CTRL+SHIFT+S** on the keyboard.

The file is no longer shared and can only be accessed by you.

Note: You must be owner of the file to be able to stop sharing the file.

Remove a user or group from sharing a file

To remove a user or group from sharing a file:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Sharing – Remove Reader** or **Sharing – Remove Contributor**.
3. Select the user or group from the sharing list which shall be removed.

You do not share the file with the user or group any more.

Note: You must be owner of the file to be able to remove a contributing user from sharing. You must be owner or contributor to be able to remove a reader from sharing.

Change owner of a file

To change owner of a file:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Sharing – Change Owner** or in the Windows client, press **CTRL+SHIFT+O** on the keyboard.
3. Enter the user name of the new owner in the **Owner** dialog box.
4. Press **ENTER** on the keyboard.

The owner of the file is changed and you are set as contributor on the file.

Note: You must be owner of the file to change owner.

What do I share with another user or group?

In the **Sharing** area in SmartShare all users and groups which you share information with are listed. If you click on a user or a group in the list, all files you share with the user or group are displayed in SmartShare.

You can access detailed sharing information by turning on details in the Sharing area. To turn on details:

1. Navigate to the **Sharing** area.
2. In the heading bar of the Sharing area click on the **Details** icon.
3. Select **Show Details**.

Detailed sharing information is displayed in the **Sharing** area. You can now click on the detailed sharing information to filter the list of files further.

Tags



Add tags to a file

To add tags to a file:

1. Select the file you want to add tags to. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Add tag** or in the Windows client, press **CRTL+ALT+T** on the keyboard.
3. In the **Tag** dialog box, enter the desired tags. When typing in the dialog box, already defined tags matching the expression will appear in a popup window. Multiple tags can be entered separated by ;
4. Press the **ENTER** key on the keyboard to assign the tags.

The tags are assigned to the file and are available in the **Popular Tags** area in SmartShare.

Note: All users sharing the file can add tags to the file.

Remove tags from a file

To remove tags from a file:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Remove Tag**.
3. Select the tag to be removed.

The tag is removed from the file.

Filter using tags

In the **Popular Tags** area in SmartShare the most popular tags are displayed in a tag cloud. To filter information using tags, click on a tag in the tag cloud and the information displayed in SmartShare is filtered only displaying files connected to the selected tag.

Search for tags

To search for tags, enter the prefix **tag:** followed by the tag name in the search box in SmartShare.

Organize



Open the Organizer

To open the organizer:

1. Select the file you want to organize. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Organize**.

The Organizer user interface is displayed in SmartShare.

Add facet values to a file

To add facet values to a topic:

1. Select the file you want to connect facet values to. Multiple files can be selected by holding down the **CRTL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
3. Check the check boxes in front of the desired facet values.
4. Click on the **OK** button.

The selected facet values are connected to the file(s). In the **Facets** area, if you click on a facet value, the connected topics will be displayed in the topic list.

Note: Depending on facet security settings, different facets can be available in the the Organizer user interface.

Note: You must be assigned as contributor on a facet and either own or be a contributor on the file to be able to add facet values connected to the facet.

Remove facet values from a file

To remove facet values from a file:

1. Select the file you want to remove facet values from. Multiple files can be selected by holding down the **CTRL** or **SHIFT** key on the keyboard.
2. Click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
3. Un-check the check boxes in front of the facet values you want to remove.
4. Click on the OK button.


The facet values are removed from the files(s).

Note: You must be assigned as contributor on a facet and either own or be a contributor on the file to be able to remove facet values connected to the file(s).

Create a new facet

To create a new facet you must be a member of the group **Facet Operators** or the group **Administrators**. Only facet operators and administrators may create new facets.

To create a facet:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Click on the **Create Facet** button  in the toolbar.
3. Enter the new facet name.
4. Press the **OK** button on the keyboard.

The new facet is created.

Note: When a new facet is created you must set facet security. Otherwise, the facet will only be visible for facet operators and administrators.


Create a new facet value

To create a new facet value you must be a member of the group **Facet Operators** or the group **Administrators** or assigned as a facet manager to the facet. Only facet operators, administrators and facet managers may create new facet values.

To create a new facet value:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.



2. Select the facet to which a new facet values shall be added.

3. Click on the **Create Value** button  in the toolbar.
4. Enter the new facet value.
5. Click on the **OK** button.

The new facet value is created and users can start connecting the facet value to files.

Change order of facets

To change order of facets:


1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet which shall be re-ordered.
3. Click on the **Move Facet up** button  and the **Move Facet down** button  to re-order the facet.
4. Click on the **OK** button.

The facet is re-ordered.

Note: When re-ordering facets, the facets are re-ordered in the **Facets** area.

Spotlight facet values

To spotlight facets values:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet value which shall be added to the Spotlight page.
3. Click on the **Toggle Spotlight** button  in the toolbar.
4. Click on the **OK** button.

The facet value is added to the Spotlight page.


Note: Select the facet value which is spotlighted and click on the Toggle Spotlight button again to remove the facet value from the Spotlight page.

Note: Facet values which are added to the Spotlight pages are indicated by a small spotlight icon.

Note: You must be a member in the group Spotlight Editors to be able to spotlight a facet value.

Delete facets

To delete a facet:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet you want to delete.
3. Click on the **Delete** button  in the toolbar.
4. Click on the **OK** button.


The selected facet is removed from SmartShare.

Note: Only facet operators and administrators can remove a facet.

Note: If a facet is removed, all facet values are also removed.

Delete facet values

To delete a facet value:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet value you want to delete.
3. Click on the **Delete** button  in the toolbar.
4. Click on the **OK** button.

The facet value is removed from SmartShare.

Note: Only facet operators, administrators and facet managers can remove a facet.

Note: When removing a facet value, the facet value will be removed from all files connected to the facet value.

Set facet security

When creating a facet in SmartShare you must assign facet security to the facet. If no facet security is assigned, only users which are member of the groups **Facet Operators** and **Administrators** can access the facet. The facet will be invisible for all other users.

Facet security is set on user account or group account level and each security setting can be assigned the following levels of security:

- ✓ **No setting:** Only facet operators and administrators can see the facet and facet values. No other users or group can see or use the facet and facet values.
- ✓ **Reader:** If a user account or a group account is assigned the security level **Reader**, the user may see the facet and facet values but cannot assign facet values to files. This setting is used when you

want users to be able to filter information using the facet but do not allow users to connect facet values to files.

- ✓ **Contributor:** If a user account or a group account is assigned the security level **Contributor**, the user may use the facet and facet values, both for filtering and for assigning facet values to files. This setting is used when you want users to organize the information using this facet and facet values.
- ✓ **Manager:** If a user account or a group account is assigned the security level **Manager**, the user may use the facet and facet values, both for filtering and for assigning facet values to files and also create new facet values connected to the facet. The user may also rename the facet and add or remove security settings on the facet. This setting is used when you want to distribute the management of the facet to other users.

It is not only the security settings on facets which determines if a user may organize a file using facets and facet values, also sharing permissions are important. A file must be owned or shared as contributor with a user for the user to have permission to assign a facet value to a file.


To be able to organize a file using facet values, the following must be true:

1. The user owns the file or someone else has shared the file with the user as contributor.
2. The user has Contributor or Manager security permissions on the facet, either directly via the user account or indirect via a membership in a group having Contributor or Manager permissions.

Or


The user is a member of the Facet Operators or Administrator group.

To add facet security:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet where security settings shall be added.
3. Click on the **Edit Facet Security** button  in the toolbar. The security settings dialog is displayed.
4. Click on the **Add user or Group** link.
5. Enter the user or group name in the **Identity** text box. Matching user or group names are displayed as suggestions.
6. Press the **ENTER** key on the keyboard. The user or group name is added in the list.
7. Select the desired security setting in the drop down menu to the right of the user or group name.
8. Click on the **OK** button.

The user or group is assigned with the set facet security settings.

To remove facet security:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.
2. Select the facet where security settings shall be removed.
3. Click on the **Edit Facet Security** button  in the toolbar. The security settings dialog is displayed.
4. Click on the **Delete** icon (X) to the right of the user or group name to remove the security setting.
5. Click on the **OK** button.

The user's or group's security setting is removed.

Search



Search text

To search text in files stored in SmartShare:

1. Place the cursor in the search box. Start writing the search expression.
2. SmartShare will display all matching words in an intellisense text box when you are typing.
3. Select the search expression you want to search.
4. Press the **ENTER** key on the keyboard.

Matching files will be displayed in the topic list.

Note: When typing an expression in the search box, matching facet values, tags and text will be displayed in the intellisense text box.

Search facets

To search facets and facet values:

1. Place the cursor in the search box.
2. Write an expression as **facet:facet value**, i.e. the name of the facet and the facet value separated by a colon:
3. Press the **ENTER** key on the keyboard.

Matching files will be displayed in the topic list.

Search tags

To search tags:

1. Place the cursor in the search box.
2. Enter **tag:** followed by the tag name.
3. Press the **ENTER** key on the keyboard.

Matching files will be displayed in the topic list.

History



Access file history

To access history of a file:

1. Select the file in SmartShare.
2. In the Windows client, click on the right mouse button and select **View Details** or press **ALT+RETURN** on your keyboard. The details pane is displayed in SmartShare. In the Web client, click on the right mouse button and select **Open** or double-click on the file.
3. Select the **History** tab in the details pane.

The history of the file is displayed where each entry represents a change to the file. The history entries are divided into 3 columns; date when the changes was made, user who made the change and action performed.

Access history entry

To access a history entry of a file:

1. Display the file history.
2. Select a history entry in the history list.
3. In the Windows client, double click on the entry to open it in the associated software or drag the entry from SmartShare to your file system or network. In the Web client, click on the **Download this version** link to the right of the history entry.

Spotlight



Add a file to the Spotlight page

To add a file to the Spotlight page:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Spotlight**. The **Spotlight** menu item will be selected.

The file is added to the Spotlight page and will be visible for all users sharing the file. The Spotlight page displays the latest 20 spotlighted files.

Note: Only users which are member of the **Spotlight Editor** group have the permission to add files to the Spotlight page.

Remove a file from the Spotlight page

To remove a file from the Spotlight page:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Spotlight**. The **Spotlight** menu item will be de-selected.


The file is removed from the Spotlight page.

Spotlight facet values

To spotlight facets values:

1. Open the facet organizer by selecting a file and click on the right mouse button and select **Organize**. The Organizer user interface is displayed.

2. Select the facet value which shall be added to the Spotlight page.

3. Click on the **Toggle Spotlight** button  in the toolbar.

4. Click on the **OK** button.

The facet value is added to the Spotlight page.

Note: Select the facet value which is spotlighted and click on the **Toggle Spotlight** button again to remove the facet value from the Spotlight page.

Note: Facet values which are added to the Spotlight pages are indicated by a small spotlight icon.

Instant Messaging



Windows client only

This feature is only available in the SmartShare Windows client.

Send an instant message

To send an instant message to a SmartShare user:

1. Hover the mouse over the user name or user icon. The user's contact card is displayed.
2. Click on the **Message** icon in the lower right corner in the contact card.
3. Enter your message in the message text box and press **RETURN** on the keyboard.

The message is sent to the SmartShare user.

Note: Instant messages can only be sent to users which are online.

Receive an instant message

When an instant message is received in SmartShare, the **Message** icon appears to the right in the status bar in SmartShare. The SmartShare icon in the task bar is also blinking.

To read an instant message:

1. Click on the **Message** icon in the status bar. All received messages are displayed.
2. Click on a message.

The contact card of the users which sent the message is opened and the message conversation is displayed.

Tip! You can pin the contact card by clicking on the pin icon in the contact card.

Discussions



Create a discussion entry

To create a discussion entry:

1. Select the file in SmartShare to which the discussion entry shall be connected.
2. In the Windows client, click on the right mouse button and select **View Details** or press **ALT+RETURN** on the keyboard. The details pane is displayed. In the Web client, click on the right mouse button and select **Open**.
3. Click on the **Discuss** tab.
4. In the Windows client, enter your discussion entry in the text box. In the Web client, click on the **Add comment** link and enter your discussion entry in the text box.

The discussion entry will be attached to the selected file.

Note: All SmartShare users sharing the file can add discussion entries.

Note: Discussion entries can not be deleted.

People



Windows client only

This feature is only available in the SmartShare Windows client.

Accessing the People view

To access the people view:

1. Select **View – People** or click on the  button to the left of the search field.

The people view is displayed in SmartShare and you can start browsing all SmartShare users in the repository you have signed in to.

You can switch between Gallery and List view by clicking on the  button or the  button.

In the Gallery view, the number of topics you share with another user is indicated by the number displayed in bottom left corner of the thumbnail.

Account operators

Only users which are members in the **Account Operators** or the **Administrators** group have the permission to administrate users and groups in SmartShare.

Display user or group details

To display user or group details:

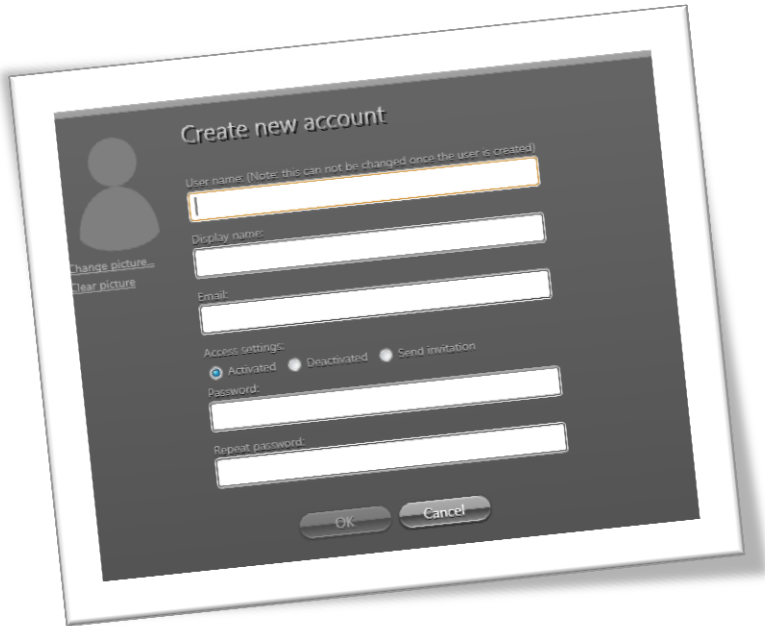
1. In People view, select a user or a group.

2. Click on the right mouse button and select **View Details** or press **ALT + RETURN** on the keyboard.

The user or group details pane is displayed in SmartShare.

Note: The detail pane is default displayed when the people view is opened.

Create a new user



To create a new user:

1. In the People view, click on the right mouse button and select **Administrative Tools – Create User** or press **CTRL+U** on the keyboard. The **Create new account** dialog box is displayed.
2. In the **User name** text box, enter the user name of the new user.
3. In the **Display name** text box, enter the display name of the new user.
4. In the **Email** text box, enter the e-mail address to the new user.
5. Click on the **Change picture...** link to set a profile picture for the new user.
6. Decide if the new user shall be activated or deactivated by checking the **Activated** or **Deactivated** check box. Default, the new user is set to be activated.
7. If you want SmartShare to send an invitation to the user by e-mail, check the **Send invitation** checkbox. The user will get an e-mail invitation and can choose his/hers own password and activate the account using the SmartShare account activation service. If you decide to send an invitation, you can not specify any password for the user. The user selects his/hers own password.
8. If you have chosen not to send an invitation, in the **Password** text box, enter the password for the new user.

Note: The password must be at least 6 characters and contain at least one digit and one special character (not a digit or letter).

9. If you have chosen not to send an invitation, in the **Repeat password** text box, re-enter the password for the new user.
10. Click on the **OK** button.

A new SmartShare user is created and can now sign in to SmartShare and start accessing and sharing information with other SmartShare users.

Tip! You can also create user invitations to SmartShare by using the invitation service, see *Invitations*.

Create a new group



To create a new group:

1. In the People view, click on the right mouse button and select **Administrative Tools - Create Group** or press **CTRL+G** on the keyboard. The **Create new group** dialog box is displayed.
2. In the group name text box, enter the name of the new group.
3. In the Display name text box, enter the display name of the new group.
4. In the Email text box, enter the e-mail to the new group.
5. Click on the **Change picture...** link to set a profile picture for the new group.
6. Decide if the new group shall be activated by checking the **Activated** or **Deactivated** check box. Default, the new group is set to be activated.
7. Click on the **OK** button.

A new SmartShare group is created. Members can now be added to the group and users can start sharing information with the group members.

Add members to a group

To add members to a group:

1. In the People view, select the group to which members shall be added.

2. Display group details. Click on the right mouse button and select **View details** or press **ALT+ENTER** on the keyboard.
3. Pin the group details by clicking on the pin icon in the upper right corner of the details pane.
4. Select the **Members** tab in the details pane.
5. Drag and drop the desired users from the people view to the Group member's area in the details pane.

The selected users are now members of the group.

Tip! You can add multiple users as group members simultaneously by selecting multiple users in the people view by holding down the **CTRL** or **SHIFT** key on the keyboard.

Connect a user to a group

To connect a user to a group:

1. In the People view, select the user.
2. Display user details. Click on the right mouse button and select **View details** or press **ALT+ENTER** on the keyboard.
3. Pin the user details by clicking on the pin icon in the upper right corner of the details pane.
4. In the People view, select the group which shall be connected to the group and drag the group to the **Group** area in the details pane.

The group is connected to the user and the user is now a member of the group.

Assign group administrators

To assign group administrators:

1. In the People view, select the group to which an administrator shall be added.
2. Display group details. Click on the right mouse button and select **View details** or press **ALT+ENTER** on the keyboard.
3. Pin the group details by clicking on the pin icon in the upper right corner of the details pane.
4. Click on the **Members** tab in the details pane.
5. Drag and drop the desired users or groups which shall be assigned as group administrators to the Manager area in the details pane.

The selected users or groups are now assigned as group managers of the selected group.

Activate or deactivate a user or group

To activate a user or group:

1. In the People view, select the user or the group.
2. Click on the right mouse button and select **Administrative Tools - Activate**.
3. Click on the **OK** button.

The user or the group is now activated.

To deactivate a user or group:

1. In the People view, select the user or the group.
2. Click on the right mouse button and select **Administrative Tools - Deactivate**.
3. Click on the **OK** button.

The user or the group is now deactivated.

Remove a user or group

To remove a user or group:

1. In the People view, select the user or the group.
2. Click on the right mouse button and select **Administrative Tools - Delete** or press the **Del** button on the keyboard.
3. Click on the **OK** button.

The selected user or group is removed from SmartShare.

Note: It is not possible to delete users or groups which have shared information. To delete a user or a group which has shared information, remove all sharing with the user or the group. You can also deactivate the user or group instead of deleting it.

Find a user or a group

To find a user or a group:

1. In the People view, enter the name of the user or group in the search box.
2. Press the **ENTER** key on the keyboard.



The list of users and groups are filtered towards the entered search expression.

Note: You can enter any number of letters or numbers in the search box when searching for a user or a group. For example, searching for **a**, will list all users and groups starting with the letter **a** in the user or group name.

Filter users and groups

All users and user groups are default displayed in the People view.

To filter users and groups:

1. Toggle the  button to display users in the People view.
2. Toggle the  button to display groups in the People view.

Show shared topics

To display all files you are sharing with a user or a user group:

1. In the People view, select a user or a group.
2. Click on the right mouse button and select **Show Shared Topics**.

SmartShare will switch to the main view and display all files you are sharing with the selected user or user group.

Send an instant message to a user

To send an instant message:

1. Select the user in the People view.
2. Click on the right mouse button and select **Send an Instant Message**.

The users contact card is displayed and you can enter the instant message in the message box.

Note: Instant messages can only be sent to online users.

Send an e-mail to a user or group

To send an e-mail to a user or group:

1. Select the user or group in the People view.
2. Click on the right mouse button and select **Send an E-mail message**.

A new e-mail is addressed to the select user or group is opened.

Tip! You can select multiple users or groups when sending an e-mail message.

Invitations



SmartShare invitation service allows you the invite users to your SmartShare repository via e-mail. Each user will receive an e-mail with a registration link allowing the user to register a SmartShare account and choose his/hers own user name and password.

Windows client only

This feature is only available in the SmartShare Windows client.

Create a user invitation

To create an invitation:

1. Select **View – People**.
2. Click on the right mouse button and select **Administrative Tools - Create user invitations**. The **Create user invitations** dialog box is displayed.
3. Enter the e-mail addresses to the users you want to invite to your SmartShare repository.

Note: E-mail addresses shall be separated by newline, comma or semicolon.

4. Click on the **Send** button.

The users will receive an invitation to the SmartShare repository in their e-mail inbox. When the user has registered a user account, the user will be displayed in the Peoples view in SmartShare.

Note: All invitations are stored in SmartShare and are accessed by selecting **View – Invitations**.

Remove invitations

To remove user invitations:

1. Select **View – Invitations**. The invitations pane is displayed.
2. Select the invitation you want to remove.
3. Click on the right mouse button and select **Remove** or press the **DEL** button on the keyboard.
4. Click on the **OK** button.

The user invitation is removed from SmartShare.

Re-send invitations

To re-send user invitations:

1. Select **View – Other - Invitations**. The invitations pane is displayed.
2. Select the invitation you want to re-send.
3. Click on the right mouse button and select **Resend**.

SmartShare will re-send the user invitation.

Display invitation status

To display invitation status:

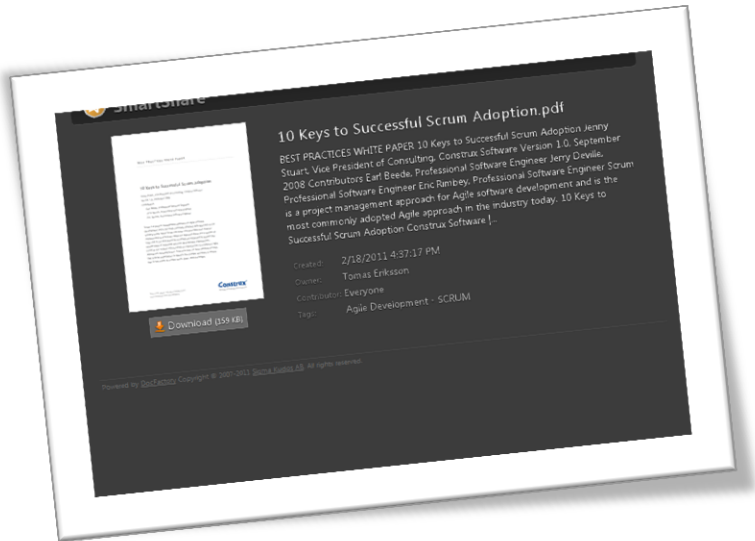
1. Select **View – Invitations**.

The invitation pane is displayed and all active invitations are displayed.

There are different types of invitations:

- **User invitation:** True invitations, where the invited user must define his/hers own user name and password.
- **Activate invitation:** Invitations to already created users where the invited users can define his/hers password.
- **Reset password invitation:** Is used when the user has forgotten his/hers password. Can only be created via SmartShare Web access.

Web access



SmartShare implements Web access to files managed by SmartShare. When sharing files in SmartShare with other SmartShare users, user may get a sharing notification by mail containing a Web link to the file. Clicking on the link will launch the SmartShare Web application and the shared file will be available via the Web.

Copy Web link

To copy a Web link:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Copy Web Link**.

The Web link is placed on the clip board and can be pasted at the desired location.

Open in Web browser

To open a file in a Web browser:

1. Select the file in SmartShare.
2. Click on the right mouse button and select **Open in Web browser**.

The selected file will be opened in SmartShare Web Access in your default Web browser.