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## File Share

File Share is the document collaboration system included in MRSware. File Share employs a check-in, check-out *revision control system* to coordinate changes to files by multiple users. This type of system is in common use in systems that are accessed by multiple users, especially when those users will be making changes to the same documents at different time. The advantages of a revision control system are in the ability to keep multiple versions of any given file, the ability to “roll-back” to a previous revision should an undesired change occur, and as a means to keep all users up-to-date with the most recent changes to documents (without deleting what they may have been working on).

We will quickly review a few of the most common procedures in a revision control system, before we get into the specifics of the user interface.

### Check-out

When you plan on making changes to a file that is in File Share, the first thing you should do is check the file out before you begin working on the file. A file can only be checked out to one user at a time. A checked out file indicates to other users in the system that the file is being worked on and that they should wait to make their changes until after you have completed yours and checked the file back in.

### Check-in

When you have completed your changes to a file, you need to check them in to make those changes available to other users in your system. Checking in a file also creates a recorded history of changes made to a document.

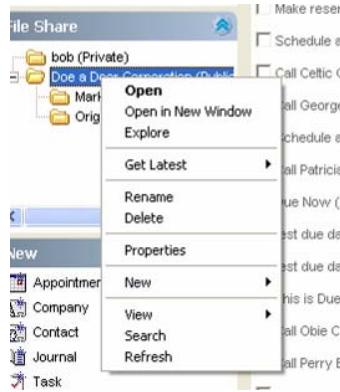
### Get Latest

As other users change files in File Share, the copies on your local file system will become out of date. Getting latest will update the local file with the most recent revision. You should get latest before you begin to work on a file to ensure you have any changes made by other users in your system.

### *File Share Tree Panel*



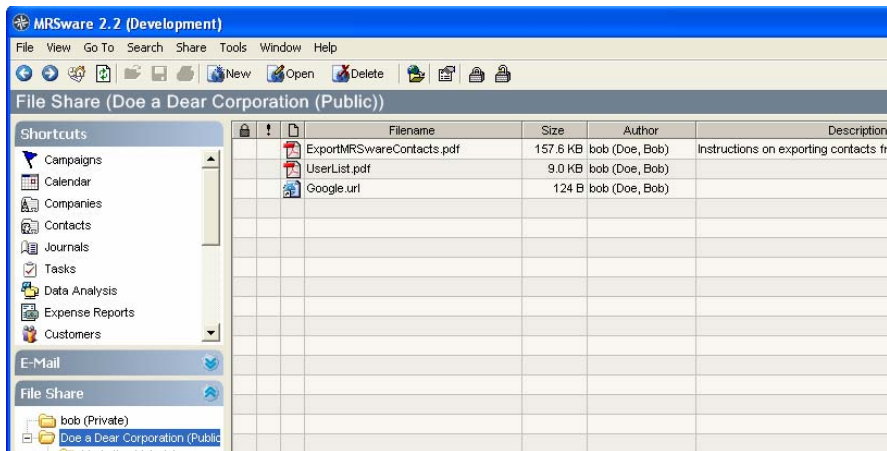
The File Share tree view appears in the panels' area on the left hand side of MRSware. Right clicking on the folder will give you a context menu of options that apply to this folder.



Menu	Description
Open	Same as left clicking on the folder. Navigates you to the files for this folder.
Open in New Window	Navigates to the files for this folder in a new window.
Explore	Opens up the folder on your local file system that contains the local copies of the files.
Get Latest	Opens up a sub menu for getting the latest version of all files in the folder.
Rename	Allows you to rename the folder.
Delete	Deletes the folder. The folder has to be empty for this operation to succeed.
Properties	Opens up the properties dialog for this folder. This is where you can adjust the folders description and permissions.
New	Opens up a sub menu for creating a new file, folder or top level folder.
View	Opens up a sub menu to expose options on how to view the folder tree.
Search	Opens up the file search dialog. Same as <i>Search</i> → <i>Files</i> .
Refresh	Refreshes the folder view.

Left clicking on a folder in this panel will navigate you to the files in this folder on the server.

### File Share List View



The File Share list view shows all the files contained within a selected folder, or that match a search made from *Search* → *Files*. The first three columns are the most important in this view.

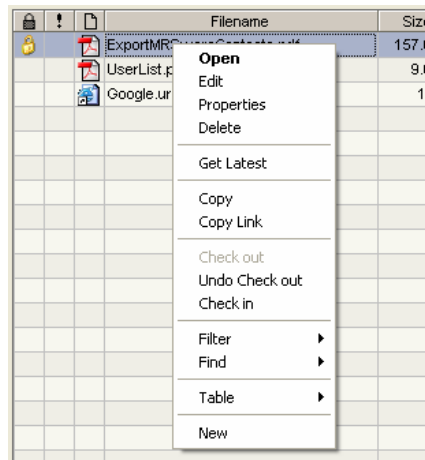
The first column indicates the checked-out status of the file. If a file has been checked out by a user, you will see a lock icon 🗝️ in this column.

The second column indicates the status of the file:

	A blank column indicates the file is either not present, or you have the most recent version of the file on your local file system.
🔄	The refresh icon indicates the copy on your local file system is an older version of the file, and that a newer revision is available.
!	The exclamation mark indicates that the file on your local file system does not match any of the revisions in File Share. This usually indicates that you have made changes to the file that are not presently available to everyone else.

The third column is the name of the file.

The default action when you double click on a file in the list is to open the file. If you right click on a file in this list, you will see the full range of available options.



Menu	Description
Open	Opens the file in the default viewing application. If the file does not exist on the local file system, it will get the latest revision.
Edit	Opens the file in the default editing application. If the file does not exist on the local file system, it will get the latest revision.
Properties	Opens up the properties dialog for this file. This is where you can adjust the files description, permissions and revision information.
Delete	Deletes the file from File Share.
Get Latest	Gets the latest version of this file regardless of what is on your local file system.
Copy	Copies the file onto the clipboard for pasting into other applications. If the file does not exist on the local file system, it will get the latest revision.

Copy Link	Copies a link to the file onto the clipboard. This link can be sent to other individuals with in your company as a way to refer to the file in File Share. This saves on the overhead of actually sending out multiple copies of a file that others in your company already have access to.
Check-out	Checks the file out to your user account for editing.
Undo Check-out	Releases the check-out lock placed on a file by your user account.
Check-in	Uploads your changes to File Share as a new revision then releases the check-out lock.
New	Uploads new files to the File Share.

### Folder and File Security

The security tab of the Folder and File Properties dialog are identical. They indicate who can access the folder or file, and what they can do with it.

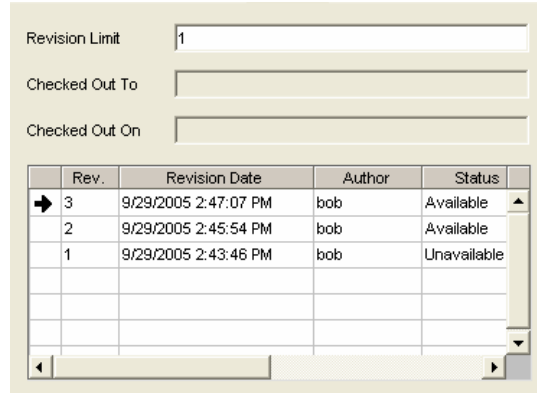
Name	Read	Write	Delete	Control	Full
(Everyone)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Business Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service Rep	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Rep	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
bob (Doe, Bob)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
eyond	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
jenny (Doe, Jenny)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When the system looks to identify what permissions a user has to a folder or a file in File Share, it starts by seeing if there are any permission for that user specifically. If no matches are found, it looks for a role that has the appropriate permission that the user belongs to. If no match is found, it then defaults to the permissions under *Everyone*. The permissions are described below:

Permission	Description
Read	This permission allows the user to open the file or folder.
Write	For a folder, this allows a user to add files to the folder. For a file, it allows a user to check-out the file and upload new revisions.
Delete	This permission allows the user to delete the file or folder from File Share.
Control	This permission allows the user to change what permissions other users and roles have to the file or folder.
Full	A shortcut for turning on or off all of the other four permissions at once.

### File Revisions

The Revision Tab is the last tab on the File Properties dialog.

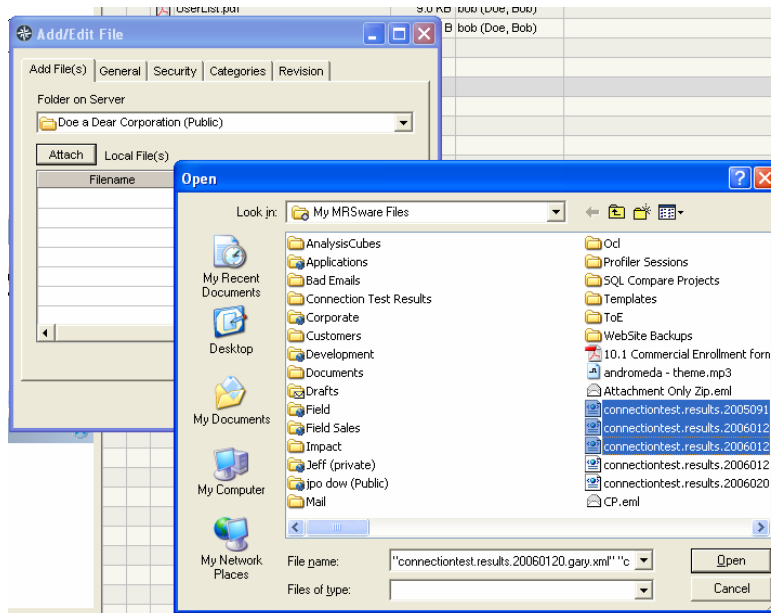


The revision limit indicates how many previous revisions of this file to keep. The number of copies that will be available from File Share is always 1 + Revision Limit, since the current revision is always kept in the system.

The checked out to and checked out on boxes indicate if the file is currently checked out and if so who has the checkout.

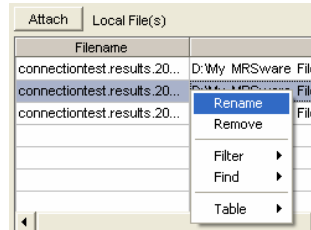
The revision list shows all the revisions made to a document, and is sorted newest to oldest. If a copy of the revision exists on the local file system, an arrow will appear in the first column indicating which revision the local file matches. The list also shows when the revision was added and by who. The status column indicates if the revision is available for download. If the status is Available, you will be able to go back to that revision if you need to. This allows you to recover sections of a file that may have been lost during editing. The last column is comments. When a file is checked in, the user is prompted for comments. This should reflect the actual changes made to the document. The system will take care of by who and when. The entire revision history of the document is kept regardless of the revision limit, so you can see a complete history of changes to the document.

### Adding New Files to File Share



When you select New from the File Share List View, you get the Add/Edit File dialog with an addition Add File(s) tab. When this dialog opens, it will also open up the Windows Open File Dialog for you to select files from your local file system. You can select more than one file at a time to add. If you want to choose additional files from another directory, just press the Attach button again to reopen the Windows Open File dialog.

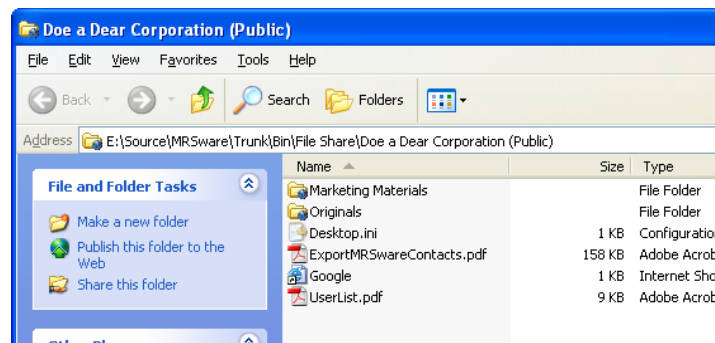
Once you selected a set of files to add to File Share, you will see them in your Local File(s) list. Right clicking on this list will reveal some additional options.



Rename will allow you to change the name of the file so it appears differently in File Share than the name of the file that was on your local file system. Remove will remove the file from the list and it will not be added to File Share.

The remaining tabs in this dialog work exactly the same as they would normally, except that the properties apply to all the files that have been selected. This allows you to quickly add a set of files with the same permissions and revision properties to the system.

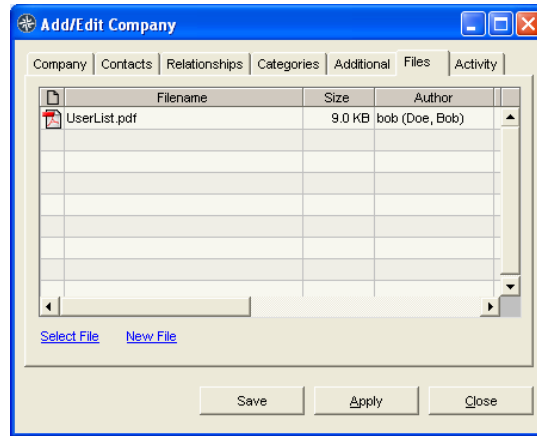
### Files on your Local File System



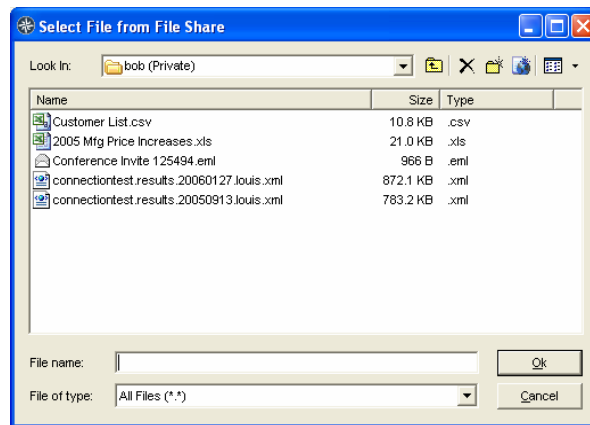
When you explore the directory structure on your local file system that corresponds to the File Share folders you will see what has actually been downloaded to your computer. You may see files that have not been uploaded to File Share as well. Folders in these directories that correspond to folders in File Share are given a different icon to help recognize them as File Share folders.

### File Tabs

Files in File Share can link to a number of other items in the system. Companies, Contacts, Tasks, Appointments and Journals, can all reference files in File Share. When a file is referenced by another item in the system, it cannot be deleted from File Share until the reference has been removed.



You reference a file from these tabs by either using the Select File option, or New File option. Select File will let you select an existing file by opening the Select a File from File Share Dialog.



This Dialog is very similar to the Windows dialog for selecting files, except you will be browsing the File Share file system instead of your local file system.

New File will let you add a new file to File Share, and then reference that file after it has been added.

All users in the system can see what files have been referenced, but they will only be able to open the files if they have Read permission to the file.

You can remove a reference by right clicking on the file in the tab, and selecting Remove.

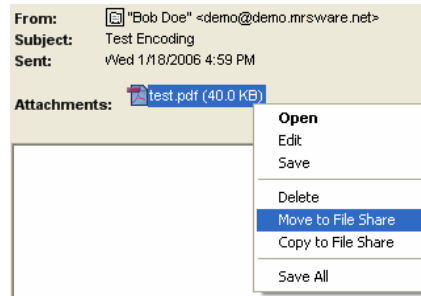
### *File Share and MRSware E-Mail*

If you are using the MRSware email client, you will notice a number of integration points with File Share, revolving around email attachments.

### **Attachment options from the Mail Viewer**

When you right click on an attachment in the mail viewer, you will see two options that apply to File Share.

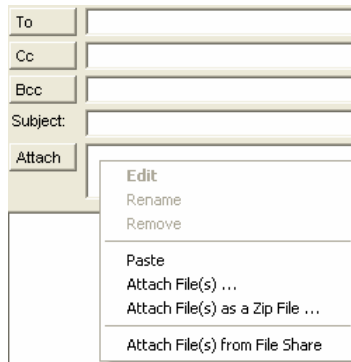




Move to File Share, will put the attachment in File Share and then remove the attachment data from the email. This makes the file available to other users and conserves on file storage space. Copy to File Share will also put the attachment in File Share, but will not remove it from the email.

### Attachment options from the Mail Editor

When you right click in the attachments area of the mail editor, you will see one option that applies to File Share.



Attach File(s) from File Share will open up the Select File from File Share dialog allowing you to directly attach server files to an outgoing email. This is useful for attaching a File Share file for someone outside of your company.