



Xerox DocuShare Connector for eCopy[™] ShareScan[®]

Installation & Administration Guide



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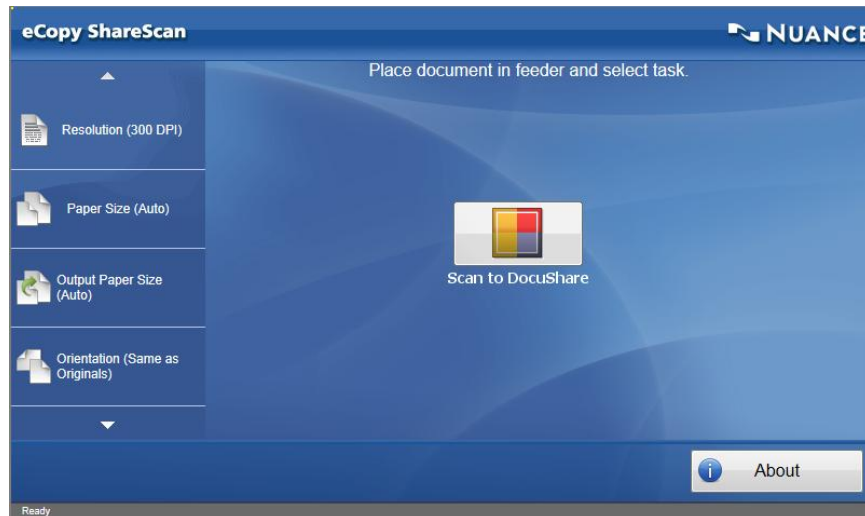
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1 Introduction



The DocuShare Connector for eCopy ShareScan allows documents to be scanned directly from a multifunction or dedicated scanner into the DocuShare Content & Document Management System using the eCopy ShareScan 5 frontend.

By using this connector users can authenticate with their existing DocuShare account credentials before selecting where in DocuShare they wish to upload a document to. The connector also allows for the setting of all Fields relating to a document.

The connector uses DocuShare's HTTP/XML interface, and therefore does not require the DocuShare Desktop client to be installed.

2 Supported Versions

DocuShare

- Version 6.0 and above

ShareScan

- Version 5.4 and above

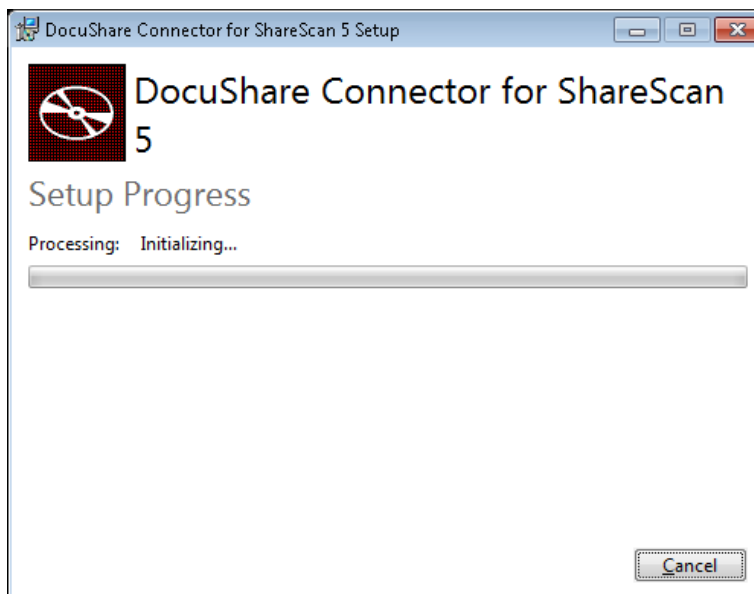
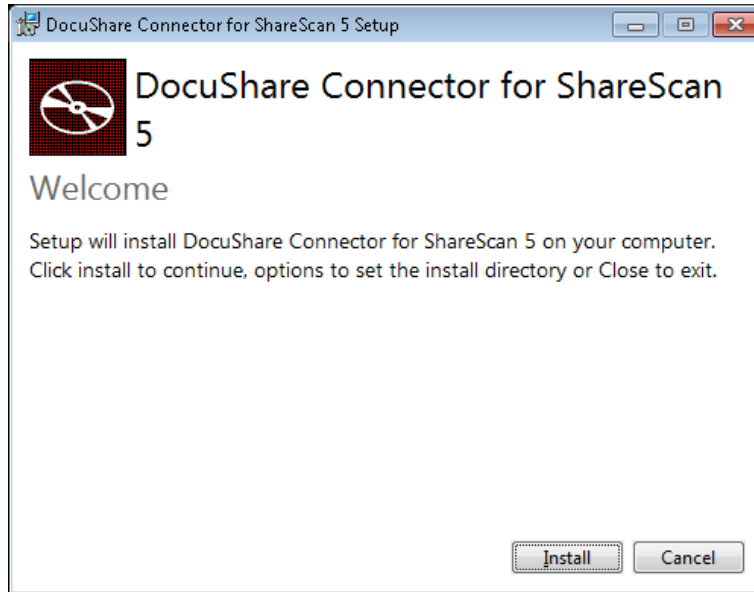
3 Pre-install checklist

- 1 Please ensure that eCopy has been installed, licensed and configured correctly before installing this connector.
- 2 Please install and configure the connector on the same computer as the ShareScan manager.
- 3 Microsoft .Net 3.5 and 4.5 must be installed on the ShareScan Manager Server.
- 4 The DocuShare Server must be reachable over the network from the ShareScan Manager Server.

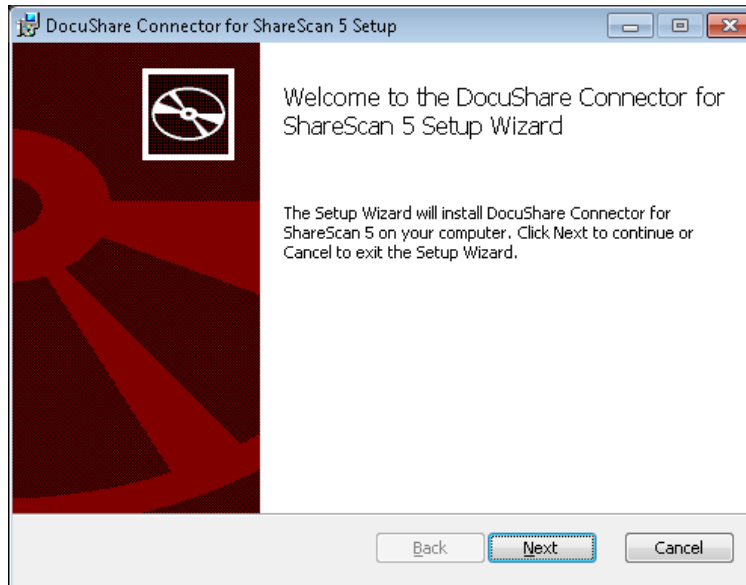
4 Installation Procedure

You will need to install the connector onto the same machine as the eCopy ShareScan Manager.

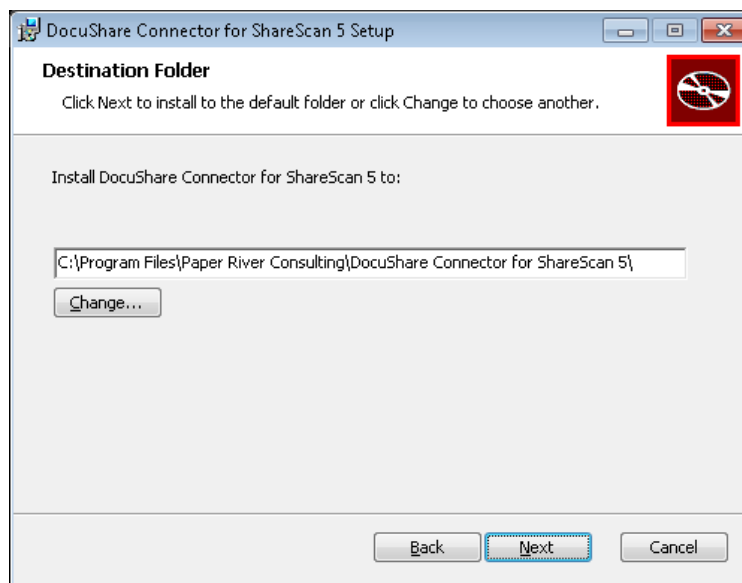
1.) Run the installer EXE, and click "Install". This will result in a progress bar being displayed.



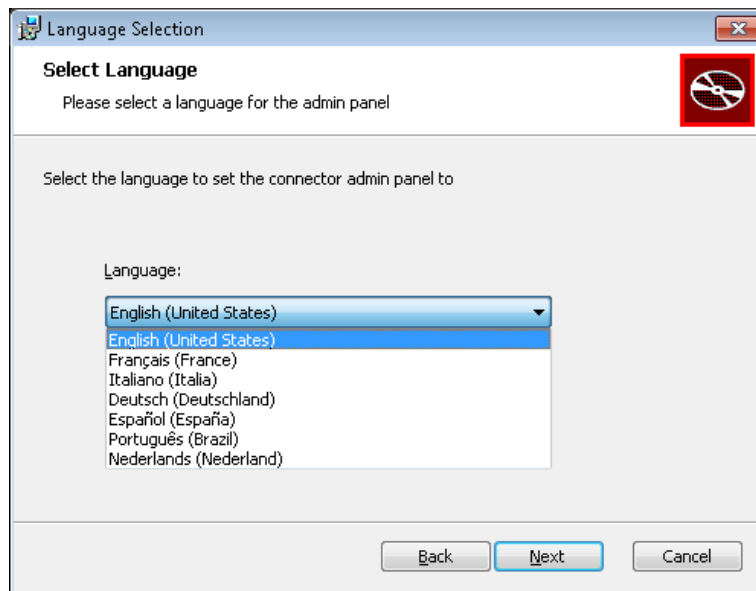
2.) In the new window that appears, select “Next” to proceed.



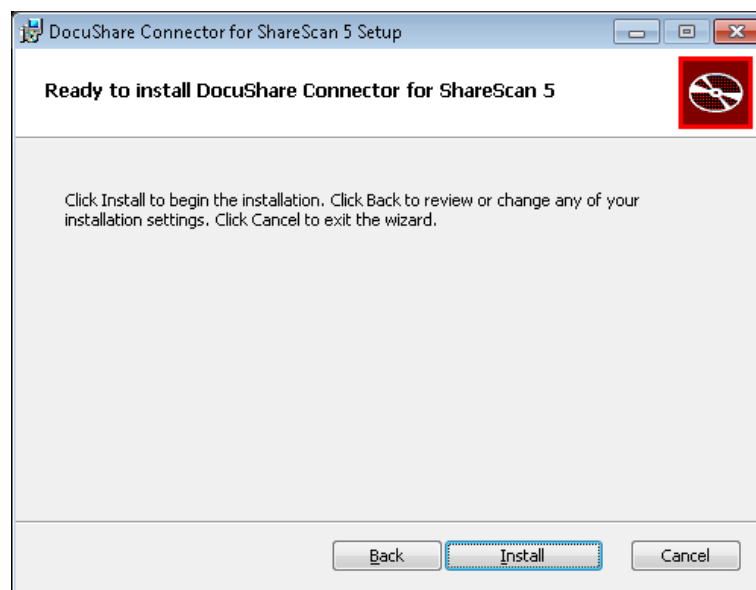
3.) On the following screen please choose an install location or use the default one before selecting “Next”.

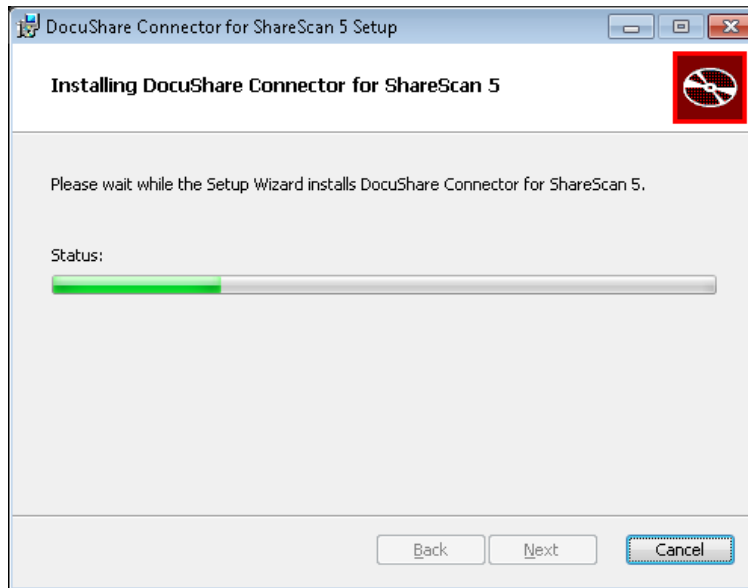


4.) Next, you must select a language for the connector administration panel controls. By clicking on the downwards facing arrow you may view the language options available. Having selected a language, click “Next”.

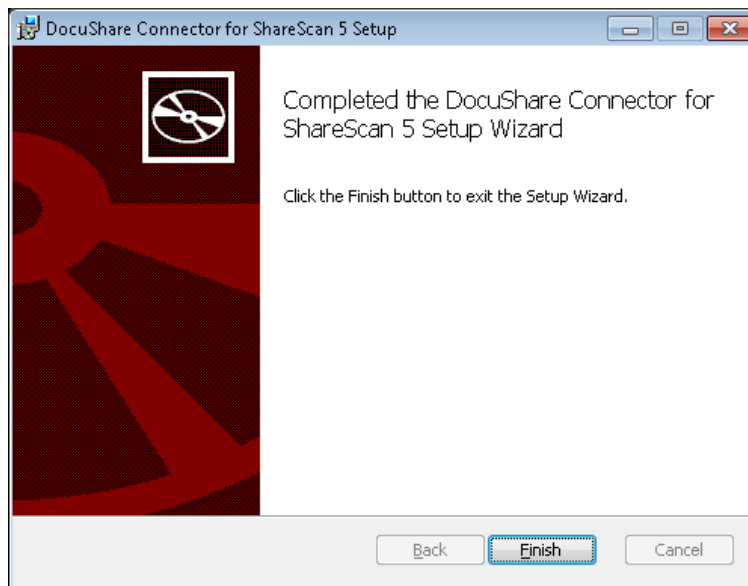


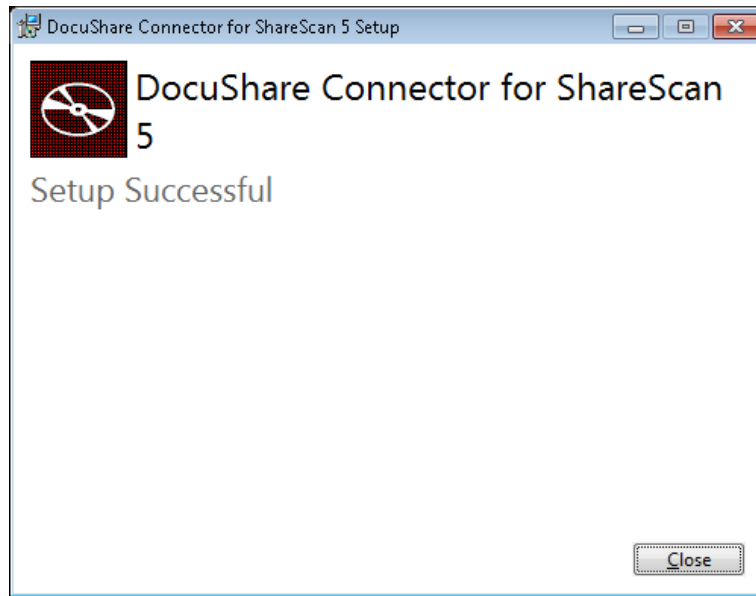
5) Finally, you must confirm the installation by clicking “Install”. This will result in a progress bar being displayed.



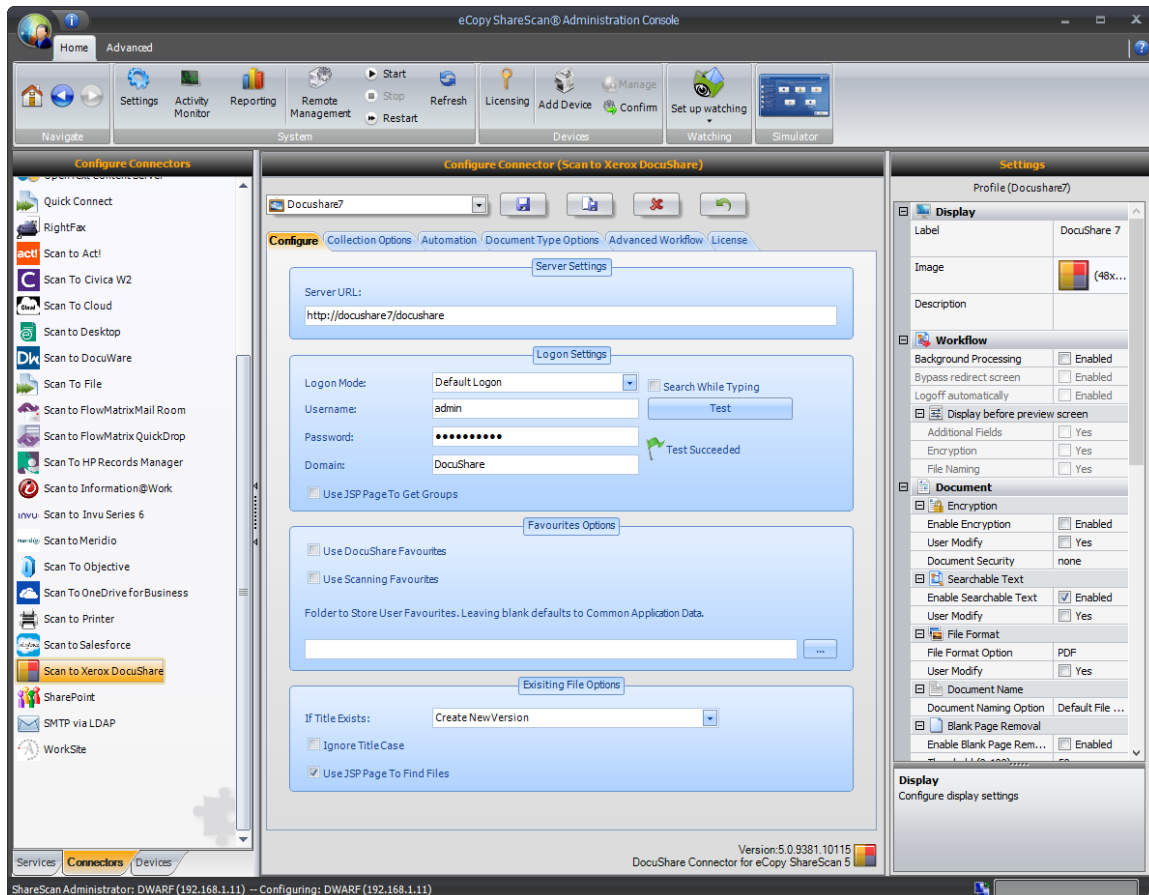


6.) The DocuShare Connector for eCopy ShareScan will now be installed. Once the installation has finished, an Installation Complete dialog will be displayed which you can then close. This will return you to the previous window, which can also now be closed.





7.) Run the eCopy ShareScan Administration Console, and select the Connectors Configuration Screen. If the connector, entitled 'Scan to DocuShare' does not appear in the left hand column, right click on the area listing the connectors, and select 'Refresh Connectors'.



5 Upgrade and Removal Procedure

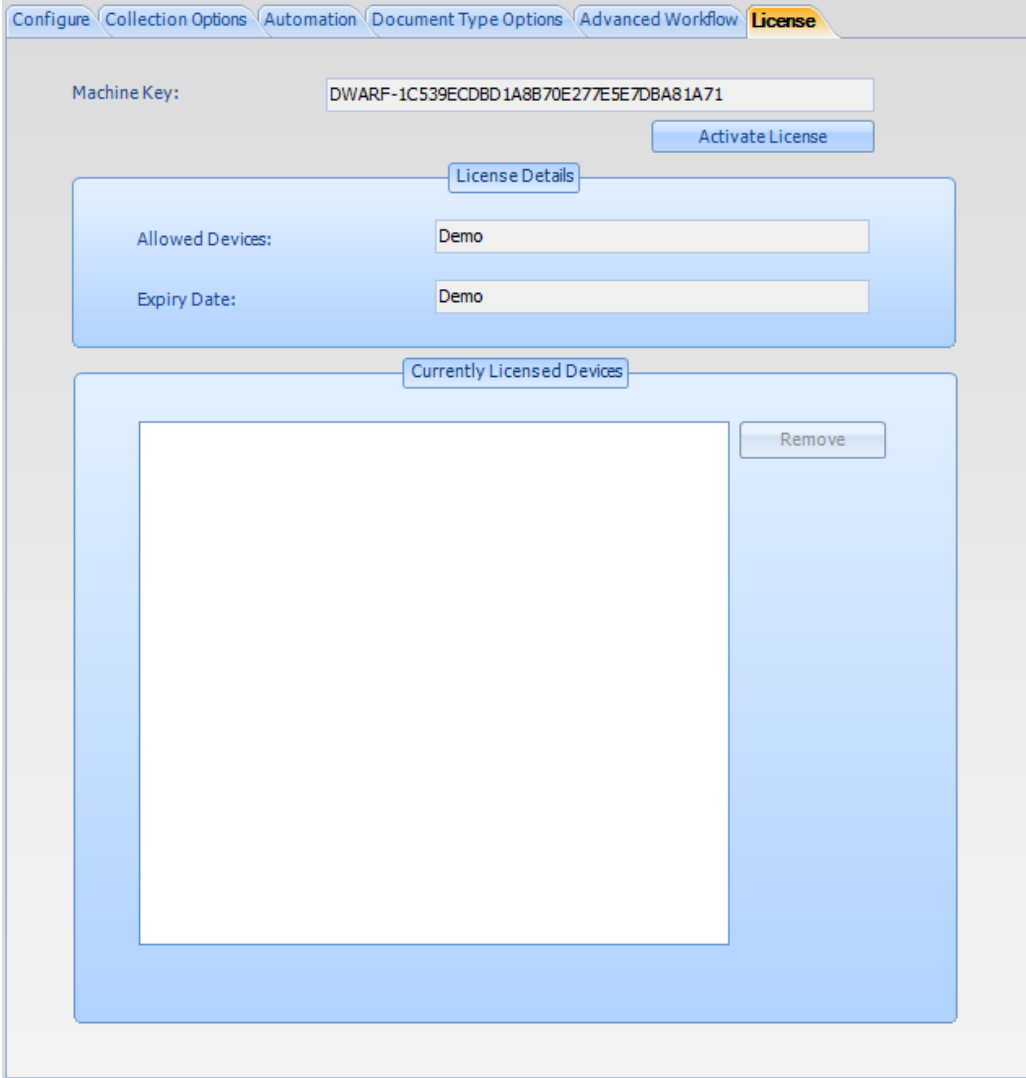
To upgrade from a previous version of this connector or to remove it completely we advise the following procedure:

Use “Add or Remove Programs” in control panel to remove the DocuShare Connector. Alternatively, re-run the installation EXE file and choose “Uninstall”.

If upgrading to a new version of the connector run the new installer after the computer has been rebooted.

6 Connector Licensing

After running the installer, the connector needs to be licensed with Paper River Consulting. To do this, run the eCopy ShareScan Administration Console. Select the 'Scan to Xerox DocuShare' connector. The last tab will be titled 'License', go to this tab.



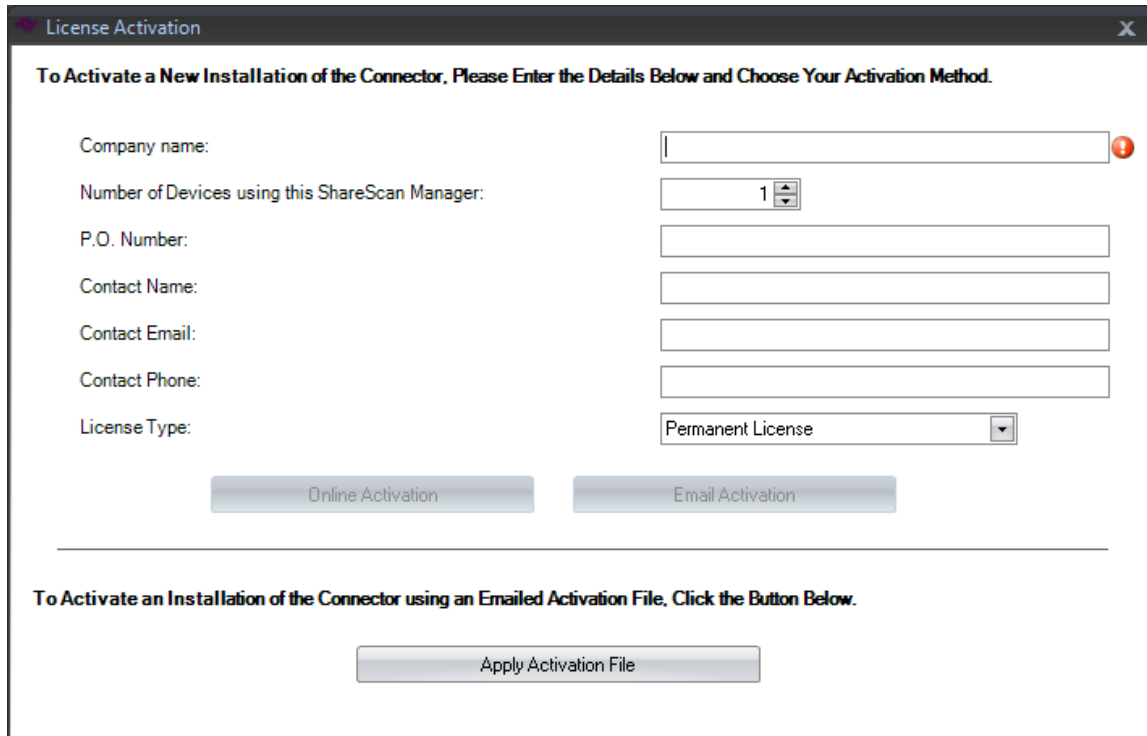
The screenshot displays the 'License' tab of the eCopy ShareScan Administration Console. At the top, there are navigation tabs: 'Configure', 'Collection Options', 'Automation', 'Document Type Options', 'Advanced Workflow', and 'License'. The 'License' tab is active. Below the tabs, there is a 'Machine Key' field containing the text 'DWARF-1C539ECDBD1A8B70E277E5E7DBA81A71' and an 'Activate License' button. Underneath is a 'License Details' section with two fields: 'Allowed Devices' and 'Expiry Date', both containing the text 'Demo'. At the bottom is a 'Currently Licensed Devices' section with a large empty box and a 'Remove' button.

When the connector has just been installed, and no license has been applied, the connector runs in Demo mode where calls to DocuShare are replaced with lookups to an xml file (See 'Demonstration Mode' later in this document for more on this). When the connector is running in Demo mode, both 'Allowed Devices' and 'Expiry Date' will display the word 'Demo'.

To activate the license, click the Activate License button. You will be presented with the License Activation screen. You have three options from this screen:

1. Fill in the required information, and activate online

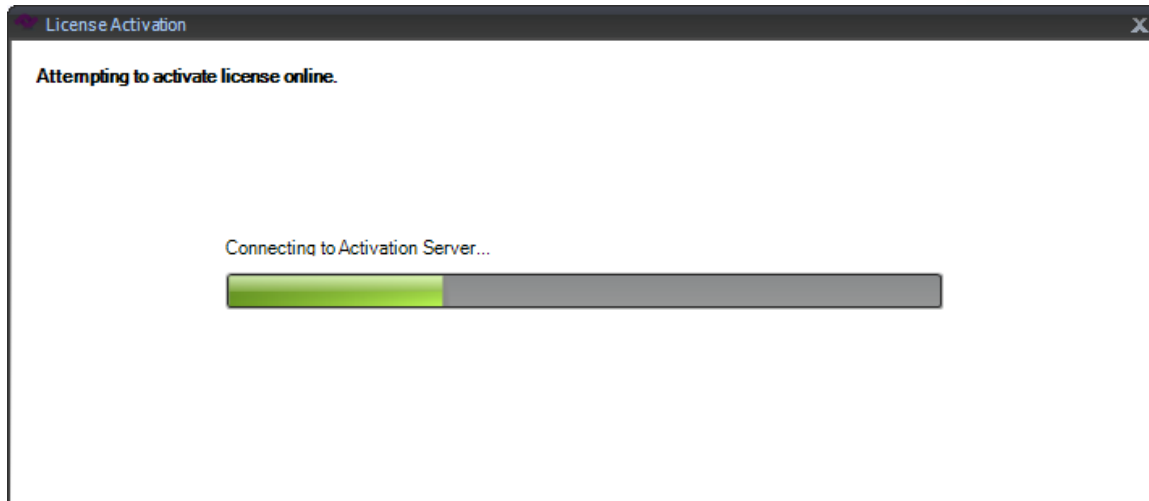
2. Fill in the required information, and activate by email (For servers without Internet access)
3. Use an activation file received by email to activate your license.



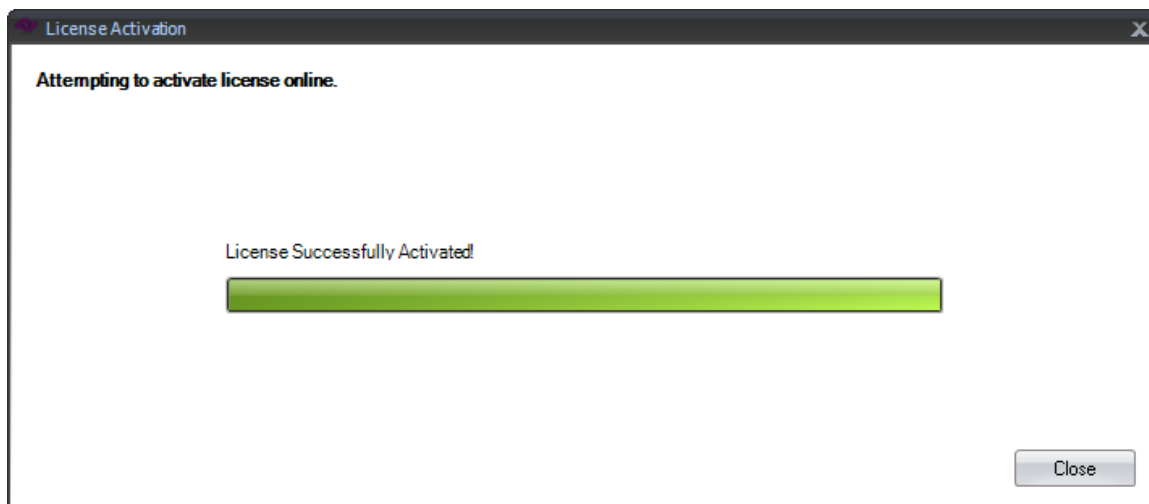
For Online and Email Activation, all fields must be populated, with the exception of P.O. Number if requesting a trial license. You will be unable to continue until all fields have been completed.

Trial Licenses are for 45 days. If you have previously requested a trial license for the current installation, you will be unable to request another one.

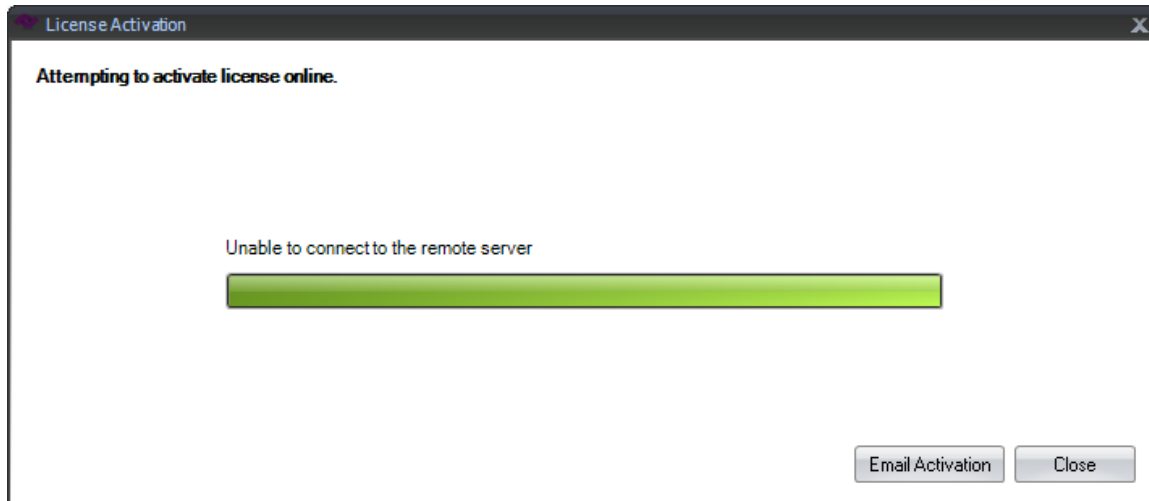
After clicking the Online Activation button, the connector will attempt to connect to our Licensing Server.



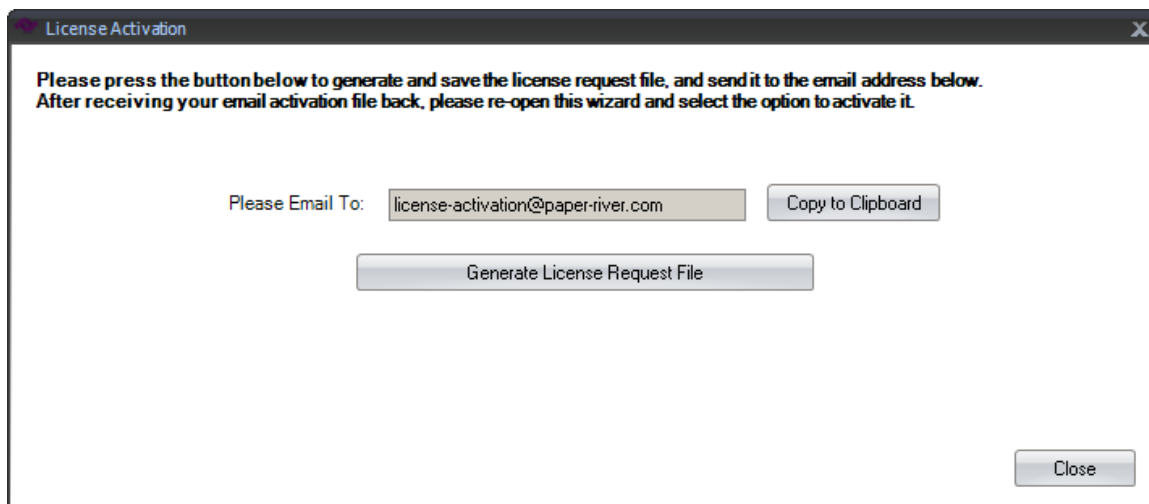
Once the license has been successfully activated, a close button will appear.



If it is unable to connect, an error message will be displayed, and along with the Close button, a button labeled 'Email Activation' will also appear. You can use this button to access the email activation screen.

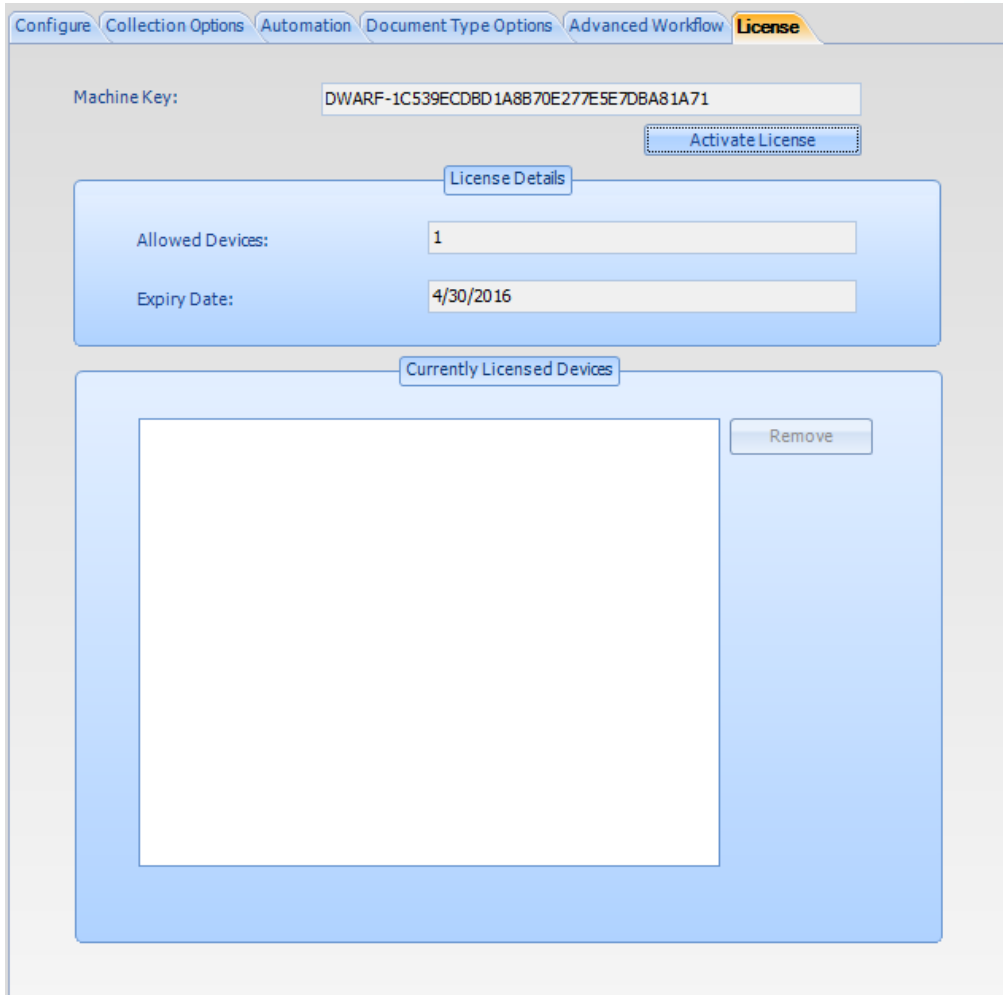


After selecting 'Email Activation', either from the first screen, or as a result of a failed online activation attempt, you will be taken to a screen with instructions on how to email the license request to Paper River.



You will need to compose an email to the email address specified. Clicking on the 'Generate License Request File' button will ask you where you want to save the license request file. Save it, and then attach it to your email. The license activation file will then be emailed back to you.

To use a license activation file, click on the 'Apply Activation File' button. This will prompt you for the location of the activation file sent back to you by email. Select the correct file, and it will be applied.



Configure Collection Options Automation Document Type Options Advanced Workflow License

Machine Key: DWARF-1C539ECDBD1A8B70E277E5E7DBA81A71

License Details

Allowed Devices: 1

Expiry Date: 4/30/2016

Currently Licensed Devices

Back on the main License tab, 'Allowed Devices' shows how many devices are allowed by the license to be running with the connector enabled at any one time. 'Expiry Date' will show the expiry date of a trial license. For a permanent license, it will display Never.

'Currently Licensed Devices' shows the current devices that are running the DocuShare connector that are licensed. To remove the license allocation for a particular device, select it in the list, and click Remove. This will allow the license slot to be taken by another device.

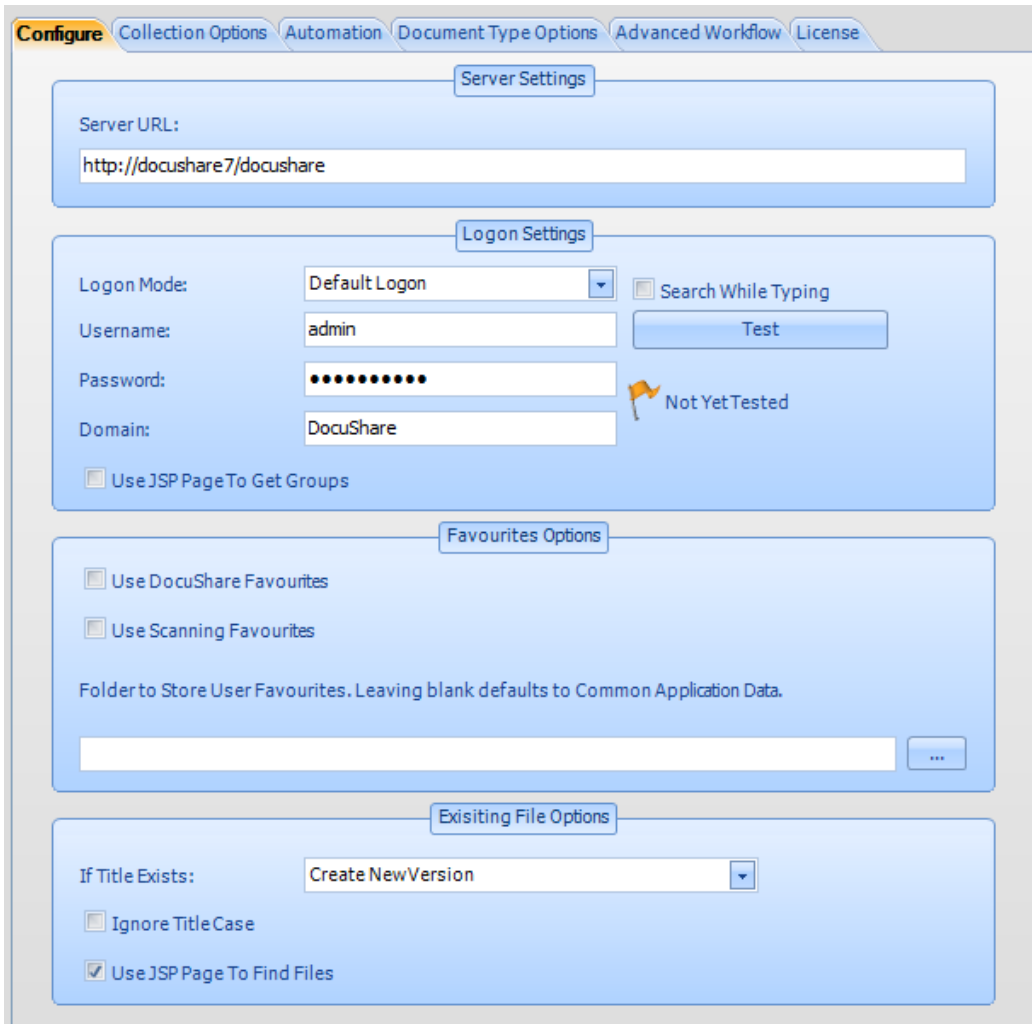
Licensing is done on a 'first come, first served' basis, per actual device, as they connect to the service manager. i.e. If you have 10 devices that are setup with the DocuShare connector to be served by a single licensed service manager, but only have a 9 device license, then the first 9 to use the connector will take up the license allocation. You can have as many DocuShare connector profiles as you wish.

Opening the Licensing Tab after devices have used the connector will refresh which devices are currently licensed.

7 Configuration

7.1 Configure tab

All basic administration can be done on the 'Configure' tab.



The screenshot shows the 'Configure' tab with the following settings:

- Server Settings:** Server URL: `http://docushare7/docushare`
- Logon Settings:** Logon Mode: Default Logon; Username: admin; Password: [masked]; Domain: DocuShare; Search While Typing: [unchecked]; Test button; Not Yet Tested message; Use JSP Page To Get Groups: [unchecked]
- Favourites Options:** Use DocuShare Favourites: [unchecked]; Use Scanning Favourites: [unchecked]; Folder to Store User Favourites: [text field];
- Existing File Options:** If Title Exists: Create NewVersion; Ignore Title Case: [unchecked]; Use JSP Page To Find Files: [checked]

As a minimum, the Server URL must be set.

You can test that the connector can connect to DocuShare by entering a username, password and domain in the relevant boxes, and clicking the Test button. The connector will then attempt to connect to DocuShare, before indicating whether it was successful or not. If it was unsuccessful, a message box will display the error reported.

N.B.: If DocuShare is only setup to have native DocuShare users, it is likely that the Domain will be 'DocuShare'.

Also under the 'Logon Settings' heading are three additional options:

- Logon mode
 - This can be set to either 'Runtime' or 'Default Logon'
 - When set to runtime, on entering the connector, it will first attempt to logon with any ShareScan Session Credentials. If there are none, or that fails, it will display a logon screen for the user to enter their credentials.
 - When set to Default Logon, on entering the connector, the credentials set in the username/password/domain textboxes in the administration console are used. If these fail, the logon screen is displayed to the user.
 - This allows a generic scanning account to be set for all users to use whilst scanning.
- Search while Typing
 - If this option is set, and the username, password and domain values are set in the administration console, then at the user logon screen, as the user types their username, the connector will look up all the usernames in DocuShare which begin with what the user is typing. It will then display any usernames found, allowing the user to quickly select one to populate the username and domain text boxes on the logon screen.
- Use JSP Page To Get Groups
 - If your DocuShare server has a large number of groups and or users, then this can cause the connector to run slowly when logging on. To speed this up, install the PRGetUserGroups.jsp page onto your DocuShare server (See section 7.3.1), and enable this option. (Note this is an optional setting, which requires making changes to your DocuShare server. The connector will still work without it enabled, but performance is likely to be affected.)

Next, there are some options under the 'Favourites options' heading:

- Use DocuShare Favourites
 - When the user is browsing in the connector for the Workspace or Collection they want to save the scanned document in, setting this option will display a button, which when pressed, allows the user to browse the Workspaces and Collections that they have added to their favourites within DocuShare.
- Use Scanning Favourites
 - When the user is browsing in the connector for the Workspace or Collection they want to save the scanned document in, setting this option will display an extra Scanning Favourites button. It will also cause a button to be displayed next to the currently selected workspace/collections name, allowing the user to add it to their scanning favourites. Pressing the scanning favourites button, allows the user to browse through the Workspaces and Collections that they have previously added to their scanning favourites.
 - This enables the user to save collections they commonly scan to so they can select the destination more quickly and easily in the future.
 - The scanning favourites exist outside of DocuShare, and are only for use at the eCopy Enabled Device.
- Folder to Store User Favourites

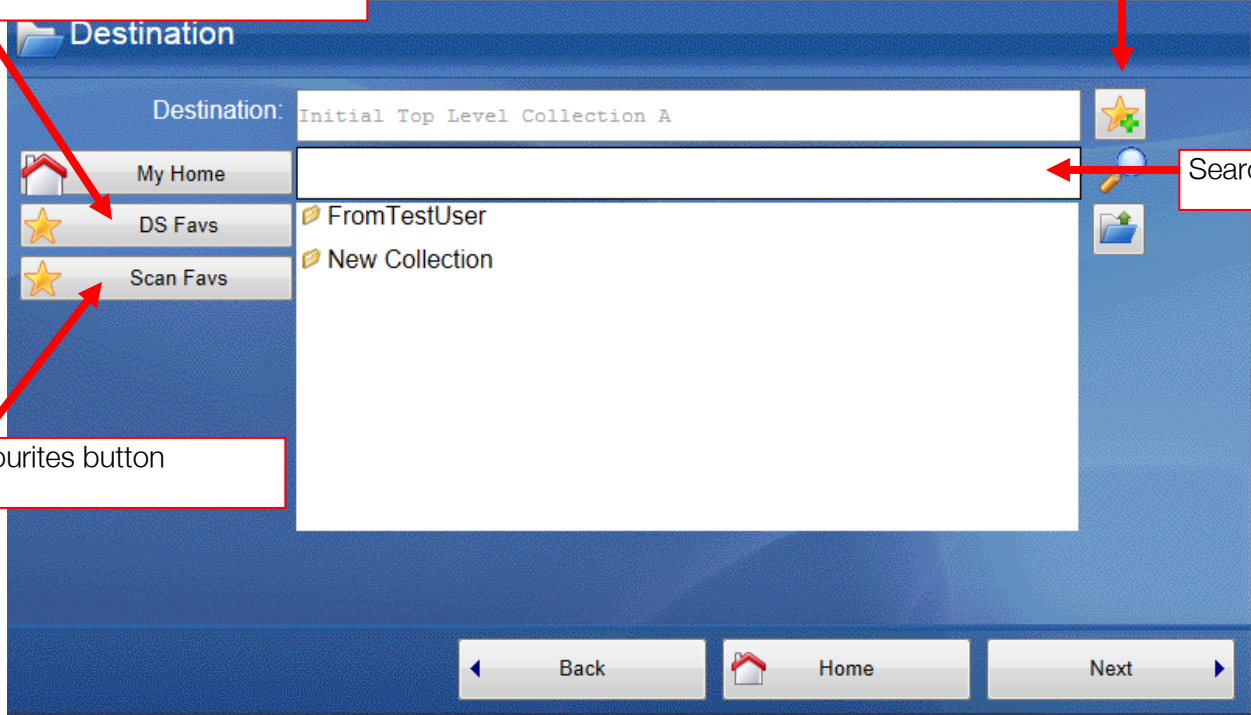
- Linked to the above 'Use Scanning Favourites' option, this textbox allows the administrator to set where the files that store all user scanning favourites are stored. By default, they are stored in the Common Application Data folder, and can be accessed by any device using the same ShareScan Manager.
- If you wish to allow the favourites to be shared amongst devices and scan stations that use separate ShareScan Managers, then this value can be set to be a network share.
- *N.B. If the same user logs onto more than one machine using eCopy at once, they may lose any favourites added / removed in that session, as the last session to log off will overwrite the stored favourites.*

Finally there are some options under the 'Existing File Options' heading:

- If Title Exists
 - If a file with the given title already exists, then the administrator can set what should happen:
 - Add Document With Same Title
 - A second document will be added with the same title
 - Add Number to Title
 - The title of the document will have a sequential number added to the end of it.
 - Overwrite Existing File
 - The existing file will be deleted, and the new document will be added in its place
 - Prepend to Existing Document
 - The scanned pages will be prepended to the existing document
 - Append to Existing Document
 - The scanned pages will be appended to the existing document
 - Create New Version
 - The scanned document will be added as a new version of the existing document
 - Error
 - An error will be shown to the user
- Ignore Title Case
 - When checking for an existing file, this option chooses if the check should be case sensitive or not.
- Use JSP Page To Find Files
 - As DocuShare can take some time to index existing documents, sometimes the search will not find a document with the same title, even though one does exist.
 - To use this feature, install the PRFindFile.jsp page onto your DocuShare server (See section 7.3.1).

DocuShare Favourites button

Scanning Favourites Add/Remove button

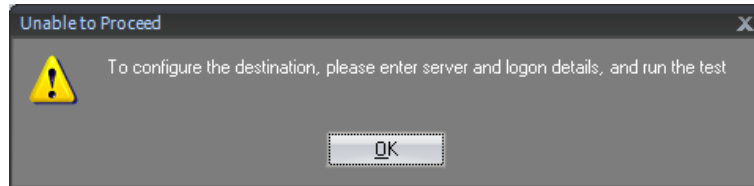


Search box

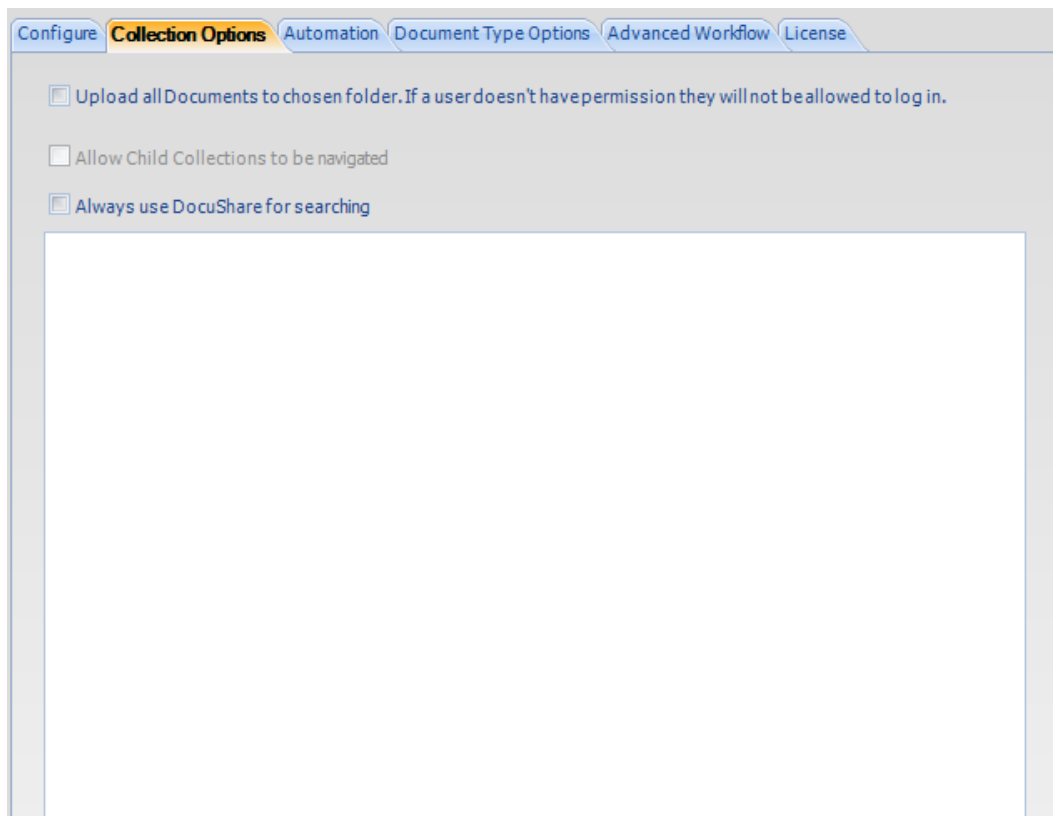
Scanning Favourites button

7.2 Collection Options tab

You may only select the Collection Options tab once you have entered logon credentials on the Configure tab, and have run a successful Test. This is because the connector needs to be able to connect to DocuShare to populate information used on this tab. If you have not done this, you will receive the following message when clicking on the tab:

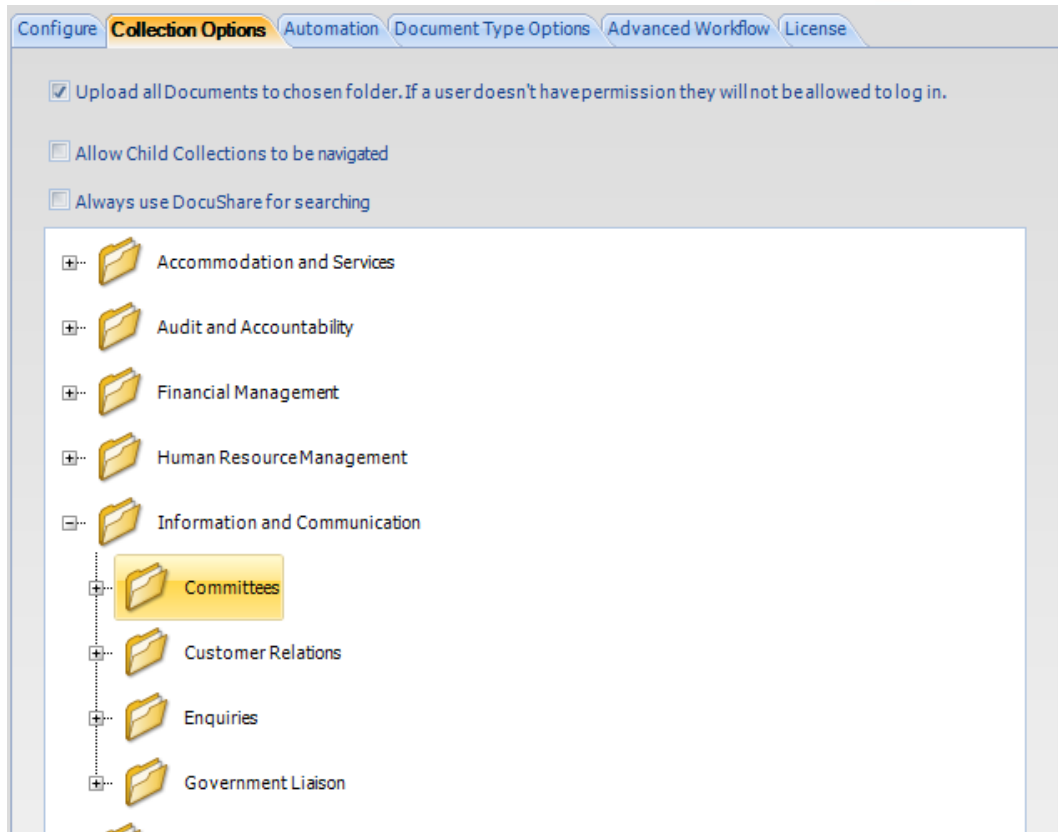


Once a connection has successfully been established you may select the tab, which will look as follows:



Under the Collection Options tab you will find three checkboxes.

Ticking 'Upload all Documents to chosen folder' will cause the blank area below to show a tree view of the DocuShare folder structure. The folders and workspaces shown are those accessible to the user whose credentials were entered on the Configure tab.



Here, you can navigate the folder structure, and select a Workspace or Collection that all scanned documents will go into.

If there are more than 50 subfolders, on expanding the parent folder, you will be shown a search box to search for the subfolder required. If more than 200 results are returned from DocuShare you will be shown only the first 200.

N.B.: If the logon options have been set to Runtime (i.e. the user has to login to the connector), then the Collection or Workspace selected on this tab must be accessible to all users that could log in.

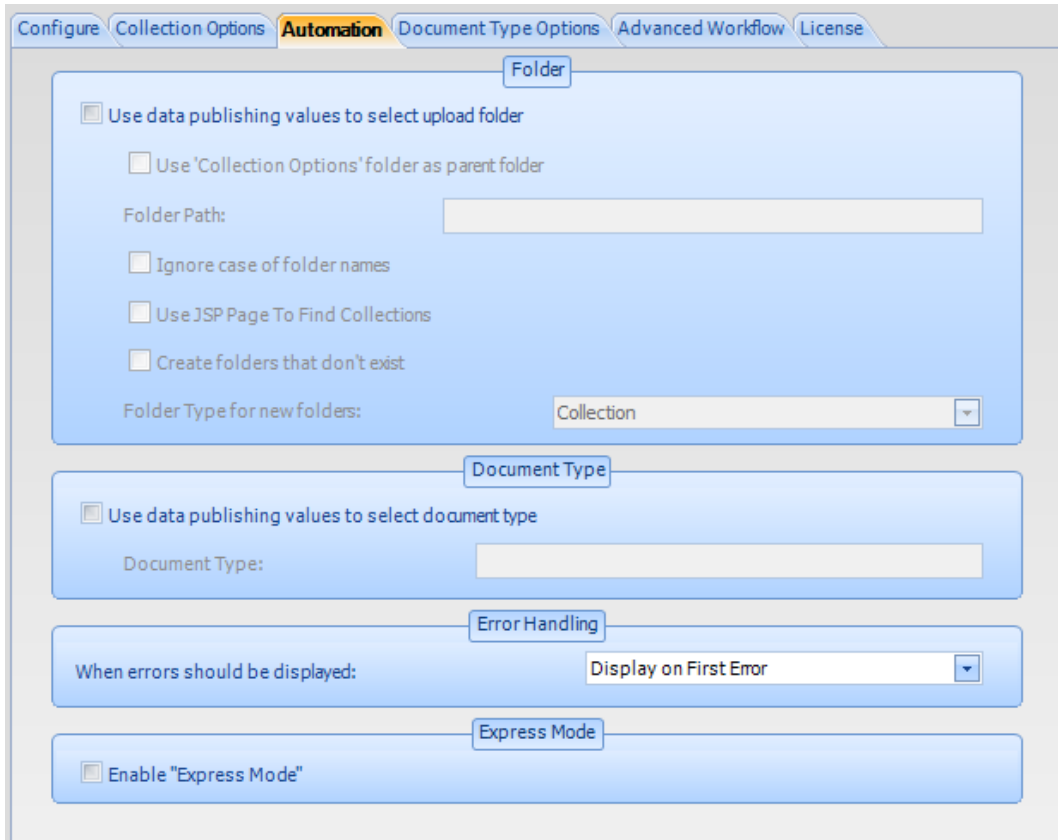
If a default destination is set, then this means that the Destination screen in the connector, where a user selects a Collection or Workspace, will no longer be displayed to the user.

After a destination has been set, if you tick the 'Allow Child Collections to be Navigated' checkbox, this will allow the user to select either the pre-selected Collection/Workspace, or any of its child Collections as the documents destination in DocuShare. In this case, the connectors Destination screen will be displayed to the user; however it will pre-select the chosen folder, and only allow the user to navigate the child collections of that folder.

Finally, if you tick 'Always use DocuShare for searching', when using the search on the destination screen, the connector will always connect to DocuShare and use the DocuShare

search. Otherwise, if there are less than 200 sub-folders in a collection, these will be cached so as to speed up searching.

7.3 Automation tab

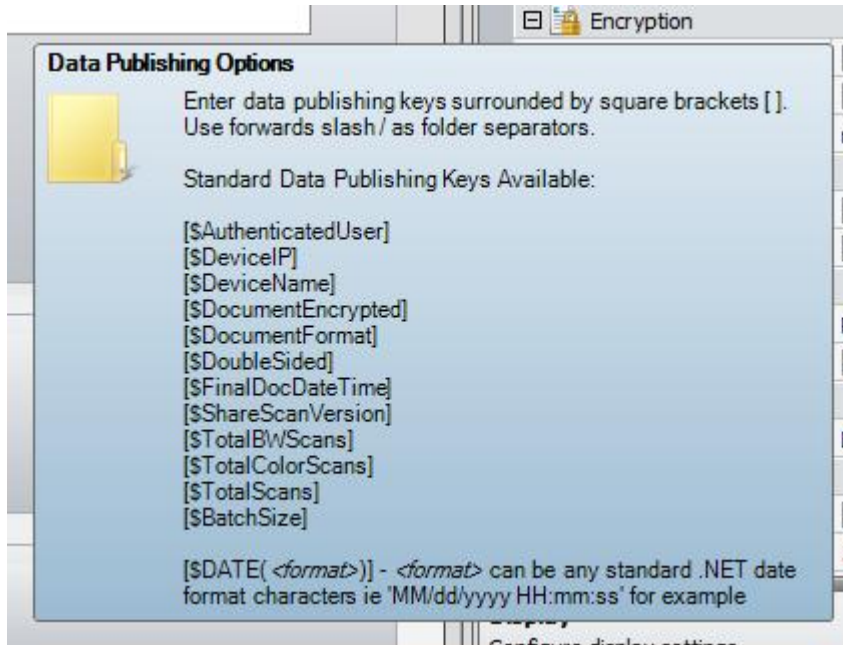


The Automation tab contains settings which can be used to automate use of the connector. With all the settings set, it is possible for the connector to be used from start to finish without any user interaction.

At the top of this tab are the Folder settings. To enable these settings, the 'Use data publishing values to select upload folder' checkbox needs to be checked.

There are then a number of options. The first is whether to use the collection selected on the Collection Options tab as the parent folder. If this is checked, then the folder path will be treated as being a subfolder of the parent path. The second option is the folder path itself. If not using the Collection Options folder as a parent, the first folder in this path should be in the root of the DocuShare server. The path should use forward slashes to specify each folder in the path. The path can then be created with as many folders as you wish. The folder path can include direct text that you type in, along with Data Publishing Values. To use Data Publishing Values, you should enter the name of the value surrounded by square brackets [].

There are also some built in values which can be seen by hovering over the field.



If the case of the data publishing values will not match those of the folders in DocuShare, you can choose to ignore the case of folder names by checking the relevant checkbox here.

In some DocuShare servers, the Indexing data may not be up to date enough to be able to search for if the folders specified in the folder path value exist. A quick and easy way to fix this is to check the “Use JSP Page To Find Collections” option. When this is checked, the connector uses a custom JSP script that must be installed on the server to check if a collection already exists. Before selecting this option, the following steps must be carried out to install the custom JSP page on the DocuShare server

7.3.1 Installing Custom JSP Pages on DocuShare Server

- Navigate to the folder where you installed the DocuShare connector
 - Typically *C:\Program Files (x86)\Paper River Consulting\DocuShare Connector for ShareScan 5\PaperRiver.Workflow.DocuShare.ShareScan5*
- Copy the jsp files from the JSPExtension folder.
- Navigate to the JSP Extensions folder on your DocuShare server
 - *[ds_home]\tomcat\webapps\docushare\jsp\extension*
 - *[ds_home]* is typically *c:\Xerox\DocuShare*
 - If the extension directory doesn't exist, create it.
- Put the jsp files in this folder
- You should not need to restart DocuShare for it to take affect

If the folders do not exist in Docushare, you can choose to automatically create them. For this, you will need to specify the Folder Type to be used for creating the new collections. If you have run the server test, then this will be populated with the possible Folder Types, if not, you can

type in the name of the Folder Type. The selected Folder Type must not have any mandatory fields except for the Name.

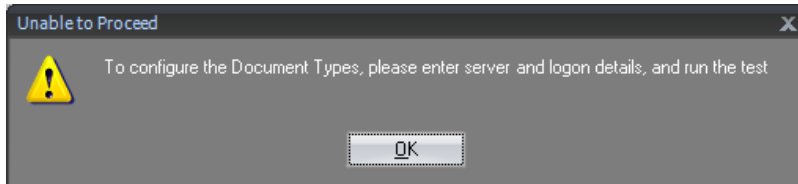
The next section allows you to choose whether or not to use Data Publishing to select the Document Type. There is a checkbox to enable this setting, and then a textbox which can be used to enter the value for the Document Type to use. Again, this can include data publishing values surrounded by square brackets.

The Error Handling section allows you to determine how the connector will handle errors. For this there are three options; the first is to show an error message for the first document in the batch that errors. In this scenario, any documents in the batch after this one are not uploaded. The second option is to show an error screen with a list of errors after attempting to upload all documents in the batch. Finally, there is an option to not display any errors, and allow the connector to complete its workflow. Any errors will then be reported through the ShareScan Reporting mechanism.

The final section of this tab allows you to enable “Express Mode”. In “Express Mode” the connector can be used by either the ShareScan email or folder watcher. To enable this mode, the connector must have all required Data Publishing values set. The user will be prompted if any of these are missing.

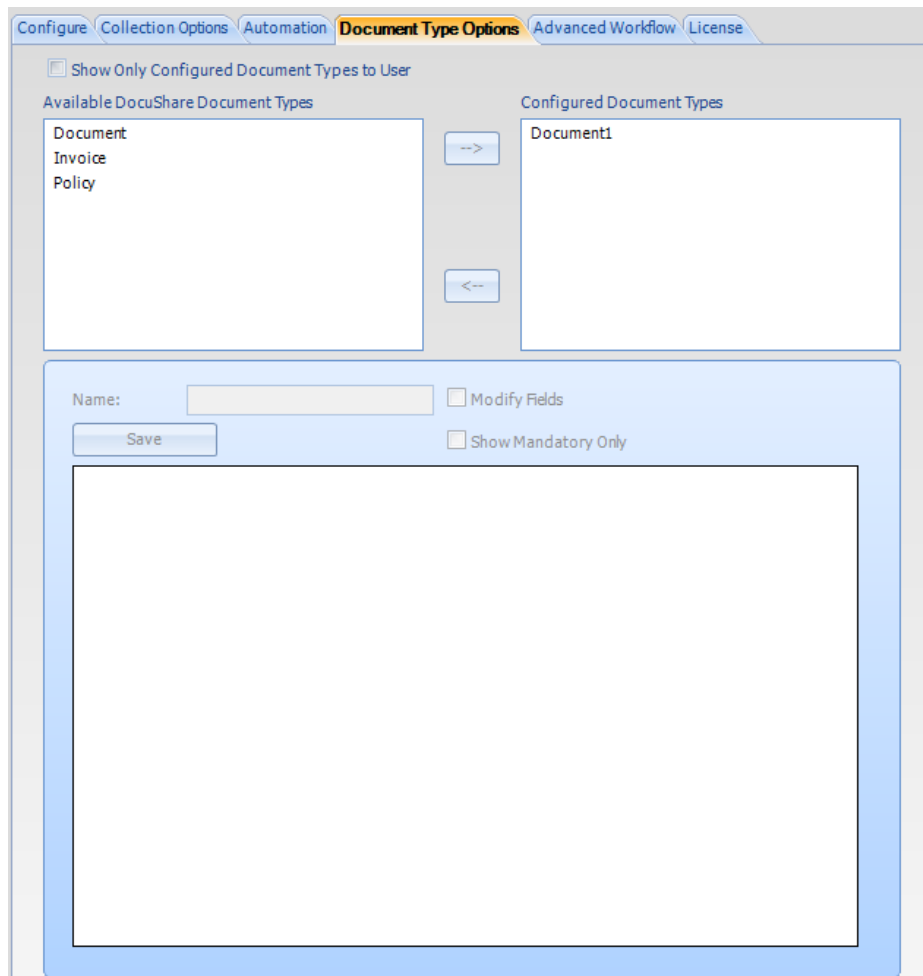
7.4 Document Type Options tab

You may only select the Document Type Options tab once you have entered logon credentials on the Configure tab, and have run a successful Test. This is because the connector needs to be able to connect to DocuShare to populate information used on this tab. If you have not done this, you will receive the following message when clicking on the tab:



Once a connection has successfully been established you may select the tab, which contains a large number of options which can be configured and set.

Initially, the only populated control will be the top left list, which will be populated with all of the Document Types available in DocuShare.



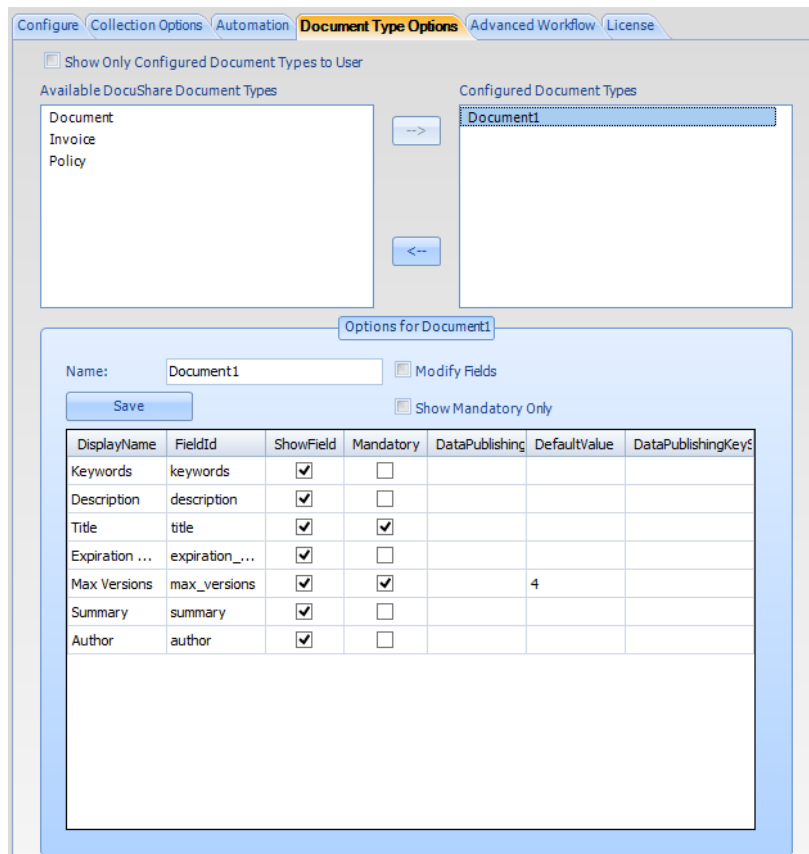
From this screen, you can modify which Document Types are displayed to the user, along with how the fields for each Document Type are displayed. If nothing is set on this screen, then all of the Document Types will be shown, and their fields shown as in DocuShare.

To restrict the Document Types shown to the user, select the ones to be shown in the left list, and use the right arrow button (-->) to copy them to the Configured Document Types list on the right. To remove Configured Document Types, select the Document Type in the right hand list, and use the left arrow button (<--)

To show only the Configured Document Types in the connector, tick the check box at the top of the screen labeled 'Show Only Configured Document Types to User'.

If you configure the connector to only have one Document Type available, then the user will not be shown the Document Type screen at the point of scanning as the Document Type will instead be automatically set.

When a Configured Document Type is selected, the table at the bottom of the screen will be populated. From here you can change the name of the Configured Document Type, as it is displayed to the user, and then decide whether you want to modify how the fields are displayed, or if you want only the Mandatory fields to be shown when the user selects this Document Type.



Options for Document1

Name: Modify Fields

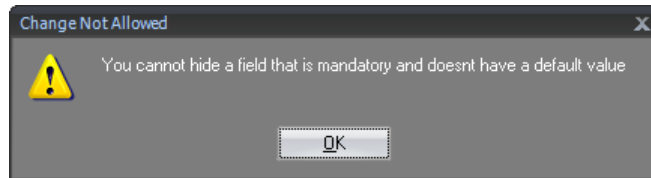
Show Mandatory Only

DisplayName	FieldId	ShowField	Mandatory	DataPublishing	DefaultValue	DataPublishingKey:
Keywords	keywords	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Description	description	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Title	title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Expiration ...	expiration_...	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Max Versions	max_versions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4	
Summary	summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Author	author	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

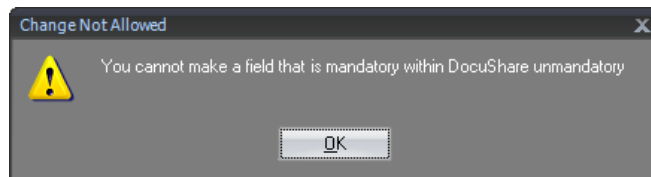
The grid at the bottom of the screen shows all the properties for the selected Document Type. Ticking 'Modify Fields' will enable the grid for you to modify the fields listed in it.

Here you can choose/change the following options:

- ShowField
 - Determines whether or not the field should be shown to users.
 - If the field is mandatory, and a default value has not been set, you will not be allowed to change this setting, and will receive a message similar to the following if you attempt to do so:



- If the field is mandatory, and you set a default value, you will be able to change this option.
- Mandatory
 - Determines whether the field should be mandatory or not (i.e. whether the user can proceed without setting a value for this field).
 - Any field that is non-mandatory in DocuShare can be set as mandatory.
 - Any field that is mandatory in DocuShare cannot be set as non-mandatory. You will receive a message similar to the following if you attempt to make a mandatory DocuShare field non-mandatory:



- DataPublishingKey
 - If this is set to a value, then before the field is displayed to the user, the connector replaces anything in square brackets with its value looked up from Data Publishing.
- DefaultValue
 - Here you can change what the default value is for the field.

To save all changes made to a Configured Document Type, you need to click the Save button.

You can copy a Document Type to the Configured Document Types list as many times as you want, as each instance will be given a unique name. This allows you to setup multiple “sub” document types, where many of the fields could be defaulted to values for a particular type of document being scanned.

If 'Show Only Configured Document Types to User' is not ticked, then the names of the Configured Document Types cannot clash with the Available DocuShare Document Types. If this option is ticked, then you can change the names to match those of the relevant DocuShare Types.

7.5 Advanced Workflow tab



The Advanced Workflow tab allows you to set the connector to route documents into PaperRiver's FlowMatrix solution. The connector will work as normal, but instead of routing documents directly into DocuShare the connector will first route documents to FlowMatrix, allowing them to be manipulated before the upload to DocuShare.

The FlowMatrix address is the server address where the FlowMatrix server service is running.

The EIS port is the port used to connect to the EIS plug-in service

The EIS Alias must match an alias set up in the FlowMatrix External Interface Support Plug-in in the FlowMatrix admin panel. The combo box should auto-populate with the available EIS Aliases if a valid FlowMatrix address and port have been entered.

The EIS Logon mode determines if the default username and password are used for connecting to FlowMatrix or if the users credential are passed through. This is only required if the EIS settings in FlowMatrix are set to require a username and/or a password.

Finally, the test button can be used to verify whether or not the connector can contact the FlowMatrix server and EIS plug-in.

7.6 Document / Scanning Settings

Whilst any tab is selected, you should see a panel on the right hand side entitled 'Settings'. This panel displays the common ShareScan settings for how a document should be scanned / what type of document should be produced, along with any document services. Please see the ShareScan administration guide for information on these settings.

7.7 Saving and Using a Profile

Finally, once you have finished modifying all settings, clicking the Save button will then prompt you for a name for the profile. You can leave it as the suggested name (overwriting it), or give the profile a new name.

You can create as many profiles as you want, allowing you to connect to multiple DocuShare Servers (as long as they are all the same version), or even create a profile to route to a particular Collection or Workspace. Each Profile is then represented as a different button on devices that are setup to include that profile.

8 Demonstration Mode

When unlicensed, the connector reverts to demonstration mode.

- Whilst in demonstration mode the word 'Demo' will appear in the 'Allowed Devices' box on the Licensing screen. In the Upload result page of the connector, 'Demo' is also appended to the Upload Successful message.
- In this mode there is no communication with a DocuShare Server. Because of this, all settings in the ShareScan Administration Console can be left blank.
- Whilst in Demonstration mode, the connector works by reading an xml file stored in the Connector installation directory (by default this is in 'C:\Program Files\Paper River Consulting\DocuShare Connector for ShareScan 5\PaperRiver.Workflow.DocuShare.ShareScan5') called 'DocuShareServer.xml'. This file has been pre-populated with a DocuShare structure, but can be modified by a technical consultant to give a more customized demonstration to a potential customer.
- The file has a structure similar to the following:

```
<?xml version="1.0" encoding="utf-8" ?>
<DocuShareServer>
  <Domains default="DocuShare">
    <Domain>DocuShare</Domain>
    <Domain>PaperRiver</Domain>
  </Domains>
  <Users>
    <User username="jeffreyl" password="password" domain="DocuShare" homeHandle="Workspace-1" lastName="Liu"
firstName="Jeffrey" handle="user-1" email="jeffreyl@docushare" userLevel="docushare">
      <Favourites>
        <Favourite handle="Collection-3"/>
        <Favourite handle="Collection-5"/>
      </Favourites>
    </User>
  </Users>
  <Objects>
    <Object handle="Workspace-1" type="workspace" summary="Summary" title="Chris's Workspace" writable="true"
mime="">
      <Object handle="Document-1" type="document" summary="Summary" title="Contract" writable="false"
mime="application/msword"/>
      <Object handle="Document-2" type="document" summary="Summary" title="Meeting Minutes" writable="false"
mime="application/pdf"/>
      <Object handle="Collection-1" type="collection" summary="Summary" title="Archive" writable="true"
mime="">/>
      <Object handle="Collection-2" type="collection" summary="Summary" title="Due" writable="true"
mime="">/>
      <Object handle="Collection-3" type="collection" summary="Summary" title="Invoices" writable="true"
mime="">/>
      <Object handle="Collection-4" type="collection" summary="Summary" title="Notes" writable="true"
mime="">/>
    </Object>
    <Object handle="Workspace-2" type="workspace" summary="Summary" title="jeffreyl's Workspace"
writable="false" mime="">
      <Object handle="Collection-5" type="collection" summary="Summary" title="Minutes" writable="true"
mime="">/>
      <Object handle="Collection-6" type="collection" summary="Summary" title="Contracts" writable="false"
mime="">/>
    </Object>
  </Object>
</Objects>
```

```

<DocumentTypes>
  <DocumentType label="Document" name="Document">
    <Fields>
      <Field id="title" type="String" required="true" display_name="Title" default_val="" visible="true"
multi_valued="false" min="0" max="30"/>
      <Field id="menu" type="Menu" required="true" display_name="Menu" default_val="1,2" visible="true"
multi_valued="true">
        <MenuItem value="1" label="label 1"/>
        <MenuItem value="2" label="label 2"/>
        <MenuItem value="3" label="label 3"/>
      </Field>
      <Field id="number" type="Integer" required="true" display_name="Number" default_val="0"
visible="true" multi_valued="false" min="0" max="5000"/>
      <Field id="bool_test" type="Bool" required="true" display_name="Boolean Test" default_val="true"
visible="true" multi_valued="false"/>
      <Field id="date_test" type="Date" required="true" display_name="Date Test" default_val="01/10/2009"
visible="true" multi_valued="false"/>
      <Field id="email_test" type="Email" required="true" display_name="Email Test" default_val=""
visible="true" multi_valued="false" max="30"/>
      <Field id="float_test" type="Float" required="true" display_name="Float Test" default_val="1.2"
visible="true" multi_valued="false" min="0" max="6000"/>
      <Field id="single_menu_test" type="Menu" required="true" display_name="Single Menu Test"
default_val="2" visible="true" multi_valued="false">
        <MenuItem value="1" label="label 1"/>
        <MenuItem value="2" label="label 2"/>
        <MenuItem value="3" label="label 3"/>
      </Field>
    </Fields>
  </DocumentType>
  <DocumentType label="Invoice" name="Invoice">
    <Fields>
      <Field id="title" type="String" required="true" display_name="Title" default_val="" visible="true"
multi_valued="false" min="0" max="30"/>
      <Field id="invoice_num" type="Integer" required="true" display_name="Invoice Number" default_val="0"
visible="true" multi_valued="false" min="0" max="20000"/>
    </Fields>
  </DocumentType>
</DocumentTypes>
</DocuShareServer>

```

The first **‘Domains’** section allows the consultant to define the domains that are listed on the logon screen. Each Domain is represented by a **‘Domain’** element, with the Inner Text the domain name to be displayed. The Domains element also has an attribute called **‘default’** which allows the default domain when the logon screen appears to be set.

The next **‘Users’** section allows the consultant to define users that can log into the DocuShare Connector whilst in demonstration mode. The **‘username’**, **‘password’** and **‘domain’** attributes of the **‘User’** element are self explanatory and are used to authenticate during the logon process. The **‘lastName’**, **‘firstName’** and **‘email’** attributes are all as they are named. The **‘handle’** attribute must be a unique identifier for the user. **‘homeHandle’** is the handle id for an Object element that represents a users **‘My Home’** space. This allows the consultant to set different Home folders for different users.

The **‘Favourites’** element under a user contains a list of **‘Favourite’** elements, each of which must have an attribute **‘handle’** that links to a corresponding Object element.

The **‘Objects’** block allows the consultant to add different objects to be shown in the connector, as if they were DocuShare objects. Objects can be nested inside each Object block, and so on, building up a tree like structure. There are a few different Object types to represent a

collection, workspace, or files of different types. It is suggested that you copy and paste the following examples when creating a new demo Object.

In all of the 'Object' examples, 'handle' should be set to a unique identifier for that object. The 'title' should be set to what you want to appear in the Connector. The 'type' should be either 'collection', 'workspace' or 'document'. The 'writable' attribute is only applicable to collections or workspaces, and should be set to either 'true' or 'false'.

The 'mime' attribute is only applicable to documents, and can be any of the following:

```
application/pdf
application/postscript
application/msword
application/vnd.openxmlformats-officedocument.wordprocessingml.document
application/vnd.openxmlformats-officedocument.wordprocessingml.template"
application/vnd.ms-excel
application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
application/vnd.openxmlformats-officedocument.spreadsheetml.template
application/vnd.ms-powerpoint
application/vnd.openxmlformats-officedocument.presentationml.presentation
application/vnd.openxmlformats-officedocument.presentationml.template
text/plain
text/csv
text/xml
message/news
text/html
image/bmp
image/cgm
image/emf
image/gif
image/ico
image/jpeg
image/mac
image/pict
image/png
image/sun-raster
image/targa
image/tiff
image/vnd.svf
image/vnd.windows-metafile
image/wpg
image/x-dcx
image/x-lotus-pic
image/x-lotusamidraw
image/x-rgb
image/x-wordperfect-graphics"
```

To create a collection, use the following xml element:

```
<Object handle="Collection-1" type="collection" title="Archive" writable="true" mime="" />
```

The 'type' attribute should be set to 'collection'.

To create a workspace, use the following xml element:

```
<Object handle="Workspace-1" type="workspace" title="Chris's Workspace" writable="true" mime="" />
```

The 'type' attribute should be set to 'workspace'.

To create a pdf file, use the following xml element:

```
<Object handle="Document-1" type="document" title="contract document" writable="false" mime="application/pdf"/>
```

The 'type' attribute should be set to 'document'.

The 'mime' attribute should be set to 'application/pdf'.

To create a word file, use the following xml element:

```
<Object handle="Document-2" type="document" title="contract document" writable="false" mime="application/msword"/>
```

The 'type' attribute should be set to 'document'.

The 'mime' attribute should be set to 'application/msword'.

To create an image file, use the following xml element:

```
<Object handle="Document-2" type="document" title="contract document" writable="false" mime="image/tiff"/>
```

The 'type' attribute should be set to 'document'.

The 'mime' attribute should be set to 'image/tiff'.

The 'DocumentTypes' block allows the consultant to add different document types to be shown in the connector, as if they were DocuShare Document Types. Within this element there may be any number of 'DocumentType' sub elements, each of which should have a 'label' and 'name' attribute.

Each 'DocumentType' element will contain a 'Fields' child element, which in turn may contain any number of 'Field' sub elements. Each 'Field' represents a Document Field that will be displayed to the user on the Document Properties screen. There are a few different Field types and as such it is suggested that you copy and paste the following examples when creating a new demo Field:

To create a String field, use the following xml element:

```
<Field id="title" type="String" required="true" display_name="Title" default_val="" visible="true" multi_valued="false" min="0" max="30"/>
```

The 'type' attribute should be set to 'String'.

The 'min' attribute determines a minimum length for the String field.

The 'max' attribute determines a maximum length for the String field.

To create a Menu field, use the following xml element:

```
<Field id="menu" type="Menu" required="true" display_name="Menu" default_val="1,2" visible="true" multi_valued="true">
  <MenuItem value="1" label="label 1"/>
  <MenuItem value="2" label="label 2"/>
  <MenuItem value="3" label="label 3"/>
</Field>
```

The 'type' attribute should be set to 'Menu'.

The 'multi_valued' attribute determines whether multiple values can be selected from the list at once and must have a value of either true or false.

Each `'menu'` Field may have any number of `'Menuitem'` sub-elements, each of which represents a possible value to be selected for that field.

To create an Integer field, use the following xml element:

```
<Field id="number" type="Integer" required="true" display_name="Number" default_val="0" visible="true" multi_valued="false" min="0" max="5000"/>
```

The `'type'` attribute should be set to `'Integer'`.

The `'min'` attribute determines a minimum value for the Integer field.

The `'max'` attribute determines a maximum value for the Integer field.

To create a Boolean field, use the following xml element:

```
<Field id="bool_test" type="Bool" required="true" display_name="Boolean Test" default_val="true" visible="true" multi_valued="false"/>
```

The `'type'` attribute should be set to `'Bool'`.

To create a Date field, use the following xml element:

```
<Field id="date_test" type="Date" required="true" display_name="Date Test" default_val="01/10/2009" visible="true" multi_valued="false"/>
```

The `'type'` attribute should be set to `'Date'`.

To create an Email field, use the following xml element:

```
<Field id="email_test" type="Email" required="true" display_name="Email Test" default_val="" visible="true" multi_valued="false" max="30"/>
```

The `'type'` attribute should be set to `'Email'`.

The `'max'` attribute determines a maximum length for the Email field.

To create a Float field, use the following xml element:

```
<Field id="float_test" type="Float" required="true" display_name="Float Test" default_val="1.2" visible="true" multi_valued="false" min="0" max="6000"/>
```

The `'type'` attribute should be set to `'Float'`.

The `'min'` attribute determines a minimum value for the Float field.

The `'max'` attribute determines a maximum value for the Float field.

For each `'Field'`, `'id'` should be set to a unique identifier for that Field. The `'required'` attributes value should be either true or false, depending on if the field in question should be treated as mandatory or not. The `'display_name'` should be set to what you want to appear in the connector. `'default_val'` can be left blank if desired, but can be used to set a default value for the field. `'visible'` determines whether or not the field will be displayed to users of the connector and can be set to true or false.

8.1 Using Demonstration Mode

There are currently two users that have already been created in the demo xml file. The usernames for these users are **jeffreyl** and **admin**. The password for both users is **password** and the domain is **DocuShare**.

When in Demonstration mode, the connector will appear to work just like when it is connected to a real DocuShare server, except in a few places, the word 'Demo' has been added. No files are saved however.