

Xerox[®] DocuShare[®] Quick Search Supplement



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DocuShare Quick Search

Overview

DocuShare Quick Search enables you to easily and rapidly find and view content stored on your site. Using a custom home page, you can search for documents, email messages, and collections as well as navigate your collection structure. In addition, a side-by-side viewer lets you browse document content while viewing and editing the document's associated properties.

This supplement describes the features unique to DocuShare Quick Search: the home page and its search capabilities; the document and properties viewer; and the Quick Search page in the Administration UI. All other features and capabilities are described in the *DocuShare User Guide* and the *DocuShare Administrator Guide* located on the site **Help Desk**.

The Quick Search Web UI

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DocuShare Quick Search provides a search-oriented home page and a side-by-side viewer that lets you view document content while viewing and editing the document's properties. This chapter explains how to use those features.

The DocuShare Quick Search home page

Your administrator customizes the Quick Search home page to display specific object types (documents, email messages, collections), object properties, and the top-level collections under Collection Explorer. However, the home page looks similar to the example shown below, with a search area on the left and your collection structure on the right.

The screenshot shows the DocuShare Quick Search home page interface. At the top, there is a header with 'Object Type' set to 'Document' and 'Maximum Results' set to '100'. Below this, the page is divided into three main sections:

- (a) Quick Search:** A search area with a text input field, a 'SEARCH' button, and links for 'Advanced Search' and 'Search Tips...'. The prompt says 'Enter one or more search words.'
- (b) Property Search:** A section for searching by object properties. It includes a 'Title' input field and a 'Modified Date' section with a date picker and a dropdown menu set to 'is after'. A 'SEARCH' button is at the bottom.
- (c) Collection Explorer:** A sidebar on the right showing 'The top level Collections on your site. Click a Collection to open it.' with three links: 'Asia Pacific', 'Europe', and 'North America'.

The Quick Search home page includes these features:

- Quick search area for finding objects that include one or more search words
- Property search area for finding objects based on assigned property values
- Your site's top-level collections, which you can click to open

Your administrator determines the home page used on your site: the standard DocuShare home page, the Quick Search home page, or the My DocuShare page. The home page displays after you

log in and when you click the **Home** link on the navigation bar. In addition, you can choose to set a different home page. See [Changing your home page](#) on page 7.

From any DocuShare page, you can go to the standard DocuShare home page by clicking the **Classic Home** link on the page footer. To go to the Quick Search home page, you click the **Quick Search Home** link on the page footer.

Running a search from the home page

From the Quick Search home page, you can run a basic search to quickly find objects. Depending on how your site is set up, you may also be able to find objects based on their type and assigned property values.

To run a basic search:

1. Go to the Quick Search home page.
2. From the **Object Type** menu, select the type of object to find.

Note: The **Object Type** menu displays if your administrator created custom objects.

3. Under **Quick Search**, enter one or more words in the field. Separate each word with a space.

Searches are not case-sensitive. A search for *Atlantic Ocean* is identical to a search for *atlantic ocean*. Also, you can exclude common words such as from, it, and where.

4. Under **Property Search**, narrow your search by entering values in one or more of the displayed property fields.
5. Click **Search**.

DocuShare displays the search results by listing the most relevant content first.

Refer to the *DocuShare User Guide* for additional search capabilities such as using the search area on the navigation bar and running advanced searches.

Using the side-by-side viewer

For PDF documents, a variety of image documents (GIF, JPEG, PNG, TIFF), and other document formats, you can view the document content while viewing and editing the document's properties. A small Windows icon appears next to the title of a document that you can open in the side-by-side viewer.

Note: To view Microsoft Office 2007 and 2010 documents, you should use Internet Explorer and you should change the registry to allow the Office system files to open in Internet Explorer. See the Microsoft article for more information.

To view a document and its properties:

1. Locate the document that you want to view.
2. Click the document title.

Both the document and its properties display in a separate window.

Note: To open or download the document, click the Document icon located to the left of the document title.

3. On the Edit Properties page, change any of the properties and click **Update**.

If you only see the View Properties page, then you do not have the necessary permission to edit the properties.

4. Click **Close** to close the window.

Changing your home page

If you prefer to use a home page different from the one your administrator specified for your site, you can set your own home page.

To change your home page:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Edit** link.
3. In the **Home Page** field, enter the URL to a collection or workspace (for example: <http://mydocushare.com/dsweb/View/Collection-155>); or click one of the preset URLs.
4. Click **Apply**.

Each time you log in and click the **Home** link on the navigation bar, the page you specified will appear. At any time you can display the DocuShare or the Quick Search home page using the links on the page footer.

Configuring Quick Search

DocuShare Quick Search provides a configuration page in the Administration UI. If you are an administrator, you use this page to select the properties that display for documents, email messages, and collections on the Web UI pages and to set up the top level collections that display on the Quick Search home page.

Changing the property display for objects

Using the Quick Search page, you can change the object properties that display on the search home page and the document properties that display in the side-by-side viewer. In addition, when new custom object types are added to your site, you can add the object types and then select the properties to display on the Web UI pages. When you no longer want an object type to appear on the search home page or to use the specified properties in the side-by-side viewer, you can remove the object type.

To change the object types and properties that display on Web UI pages:

1. On the DocuShare page footer, click **Admin Home**.
2. From the **Administration** menu, click **Site Management | Quick Search**.
3. Click the tab for the Web UI page whose displayed properties you want to change.
4. From the **Object Type** menu, select the object type whose displayed properties you want to change.

A list of properties for that Web UI page and object type displays, with Yes and No radio buttons next to each property.

5. For each property, click **Yes** if you want the property to appear on the selected page for the object type or click **No** if you do not want the property to appear on the selected page for the object type. Properties are displayed on the page in the order in which you select them.

Note: When setting the properties to display on the search home page, the same properties display as column headings on the search results page. Therefore, you may want to limit the number of properties as the page width increases to accommodate the properties.

6. To make more changes, repeat steps 3 through 5.
7. To add a new object type, do the following:
 - a. Click the **Object Types** tab.
 - b. From the **Add Object Type** menu, select the object type.

Note: If the **Add Object Type** menu does not appear, then there are no object types that you can add.

- c. Click the **Add** button.

The object type appears in the Object Type menu on the three other tabbed pages and on the search home page. Repeat steps 3 through 5 to select the properties to display for that object type on the Web UI pages.

8. To remove an object type, do the following:

- a. Click the **Object Types** tab.
- b. From the **Remove Object Type** menu, select the object.

Note: If the **Remove Object Type** menu does not appear, then all object types have been removed.

- c. Click the **Remove** button.

The object type no longer appears in the **Object Type** menu on the three other tabbed pages and on the search home page.

Setting up the Collection Explorer folders

Using the Web UI and the Quick Search configuration page, you can define which top collections to display on the Quick Search home page and then create a collection hierarchy under those collections.

Before you begin, you should plan the collection hierarchy that you want to use at your site as well as the access permissions you want to give to site users and groups.

To set up the Collection Explorer:

1. In the Web UI, create a collection. Note the handle number.
2. In this collection, add the collections that you want to display under Collection Explorer on the Quick Search home page. These are the top level collections.
3. In the top level collections, create additional collections.
4. Continue creating collections until your hierarchy is complete.
5. On the DocuShare page footer, click **Admin Home**.
6. From the **Administration** menu, click **Site Management | Quick Search**.
7. Click the **Search Home Page** tab.
8. In the **Collection Handle** field, enter the collection handle you noted in step 1.
9. Click **Apply**.
10. On the DocuShare navigation bar, click **Home**.

The collections you created in step 2 display under Collection Explorer.

Setting the home page

Depending on your site preferences, you can set the default home page. The home page displays after users log in and when they click the **Home** link on the navigation bar.

To set the home page:

1. On the DocuShare page footer, click **Admin Home**.
2. From the **Administration** menu, click **Site Management | Site Configuration**.
3. From the **Set Home Page** menu, select the page that you want to display after users log in and when they click the **Home** link on the navigation bar.

Users can choose to set a different home page. See [Changing your home page](#) on page 7