

## Buttons

Windows Explorer toolbar; Microsoft® Word, Excel & PowerPoint® dialog box toolbar; Adobe® Acrobat® 7.0 Professional dialog box toolbar.



### History

Turns display of the History pane on/ off in My Workspace, In Tray or Out Tray.



### Search

Turns display of the Quick Search Toolbar and search results pane on/ off.



### Retrieval Bar

Turns display of the Retrieval Bar on/ off.



### Add Documents

Displays an **Open** dialog box for browsing and selecting documents to add to FileSphere.



### Ghost Folders

Turns display of Ghost Folders on/ off.



### Unclassified

Turns display of documents that are unclassified for the current view (the currently selected property) on/ off.



### View By

Turns View Folders on/ off for the currently selected property  
Click the down arrow ▼ to select a property to create View Folders.



### Retrieve using values

Displayed on the right side of the Retrieval Bar. Toggles between using **properties only** or **values and properties** for retrieval.

Microsoft® Word, Excel & PowerPoint® FileSphere toolbar; Adobe® Acrobat® 7.0 Professional FileSphere toolbar



### Open

Displays the **Open** dialog to allow you to select a FileSphere document to open.



### Save

Saves the active document in FileSphere.



### Finalize

Finalizes (publishes), closes and returns the active document.



### Export to PDF (If FileSphere PDF Add-in is installed)

Creates a PDF file of the active document and saves it into FileSphere.

## Spaces



### FileSphere

Marks the boundary of FileSphere on your computer. Has a right click menu for access to Administration, Restart, Property settings and adding links to network document spaces

### Document Space

Repository of FileSphere documents from where documents are managed and checked in and checked out to maintain version control. Each document space has its own classification and property settings. One document space is set as the default space for Templates and the Shredder.



### Local Document Space

Always named 'Document Space' and is local to a particular computer. Physical document storage can still be on a network drive to enable centralised backup. This Document Space can be hidden if the organisation wishes to maintain central document spaces only.



### Network Document Space

Document spaces on your organisation's network. Known as Network Peers, can be your organisation's central document spaces or those of other FileSphere users.



### My Workspace

Personal workspace that holds documents that you are working on. You can check out documents from the Document Space, to prevent anyone else from editing them, by sending them to My Workspace.



### Favorites

Shortcuts for quick access to documents in your local Document Space or any network document space on your organisation's network.



### In Tray

Holds documents sent you by other FileSphere users. Documents are moved to My Workspace on opening.



### Out Tray

Holds documents that you have sent to other FileSphere users. Documents are removed once recipient opens them.



### Templates

Associated with your default document space only, for keeping links to copies of important templates, master documents and proformas.



### Search

If you still prefer to search for documents, provides a Quick Search Toolbar and an Advanced Search. You can search by file name and document content.



### Shredder

FileSphere's equivalent of a recycle bin, which holds deleted documents. Documents can be deleted or restored from the Shredder.



### View Folder

Dynamic virtual folders that group documents with common classification (property & value). Created and collapsed by using the View By function. Used to retrieve and classify documents.



### Ghost Folder

Dynamic virtual folder characterised by a property and a value and used for classifying documents. New Ghost Folders can be created using the Add Folders button.

## Windows Start Menu



### Administration

Opens FileSphere Administration in a Microsoft Management Console (MMC) window, for viewing and maintaining: security settings; logs; schemas; deleted documents; expired documents; deleted versions; and services & settings.



### Document Recovery Wizard

Copies documents/ schemas from their FileSphere storage to a specified location on your computer.



### FileSphere

Opens FileSphere in Windows Explorer. Regular file system directories and folders cannot be accessed in this view.



### Help

Opens FileSphere online User Help.



### Import and Export

For moving *selected* document files, metadata or schemas between Document Spaces or computers for backup, maintenance or transferring files.



### Uninstall FileSphere

Runs the FileSphere uninstallation program. Allows you to keep FileSphere documents to recover later.



### Backup and Restore

For backing up, restoring or transferring *everything* contained in one Document Space, including document files, versions, metadata and schemas.



### Administration Help

Opens FileSphere online Administration Help.

## Retrieving Documents

### Retrieval Bar

property=value/

(1) Click in the Retrieval Bar and press the down arrow key; (2) Select a property using the arrow keys; (3) Type an equals sign (=); (4) select a value using the arrow keys; (5) Type a forward slash (/); (6) Optionally, repeat (2)-(5) multiple times to narrow the selection; (7) press the ENTER key.

Tip: restrict long property lists by typing the first letter of a property.

AND / OR type a **value** (word or phrase) into the Retrieval Bar and press ENTER to retrieve all documents classified with that value in any property.

### View By

Select the Document Space and **View By** a property by either clicking the View By button or right clicking and selecting View By from the menu; then select a property to create View Folders.

## Useful Shortcuts

F1

### Help

Displays FileSphere online User Help, or Administration Help in FileSphere Administration console.

Ctrl G

### Ghost Folders

Turns display of Ghost Folders on/ off.

Ctrl U

### Unclassified

Turns display of documents that are unclassified for the current View (the currently selected property) on/ off.

Shift+ F10

### Shortcut menu

Opens a shortcut menu for the selected item (this is the same as right-clicking an object or pressing the Application key).



### Application key

Opens a shortcut menu for the selected item (this is the same as Shift+F10 or right-clicking an object).

ALT+  
double click

### Document Properties

ALT+double click on a FileSphere document opens its properties dialog box.

ALT+ ENTER

### Object Properties

Opens the properties dialog box for the selected document or object.

CTRL+ TAB

### Object Properties tabs

Move through the property tabs.

CTRL+SHIFT+TAB to move backwards through the property tabs.

F2

### Rename

Rename selected document or object (where renaming is permitted).

F5

### Refresh

Refreshes the current window.

### Numeric Keypad

\*

Expands everything under the currently selected View / Ghost Folder.

+

Expands the currently selected View / Ghost Folder.

-

Collapses the currently selected View / Ghost Folder.