

DocuShare Interact Contributor Guide

XEROX
DocuShare®

Release 3.1

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Introducing DocuShare Interact

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What is DocuShare Interact?

The World Wide Web makes an ideal platform for all manner of collaborative work. Although web pages are easily accessible by any computer running an Internet browser, it is still awkward to use the web as a collaborative work environment in which many people can change web pages and add content. Traditionally, web pages are treated as “published” documents; they are owned and controlled by a web master or by the documents’ authors. Most visitors to a web page can do little more than read the page and perhaps comment on content via email.

DocuShare Interact provides an easy-to-use editor that enables any number of users, called contributors, to collaborate on a project using the web. A user, designated as an author, creates an Interact page for a specific task or project. The author determines the design of the page and controls how much contributors can change on the page. After the author places the page in a DocuShare collection, you and other contributors can add content to the page. As a contributor, you do not need to know HTML code, how to use an HTML editing tool, or anything about the file system in which the page is stored. Using a web browser, you and other contributors can easily make changes to an Interact page.

Interact pages can be created for any task that requires or would benefit from a collaborative effort. For instance, Interact pages can be used to gather agenda items for a meeting, to assign and track action items, to provide a directory of information such as a project’s team members or technical papers, and to facilitate co-authoring of a document.

Interact editing features

Interact is designed to encourage “lightweight” editing of its pages. This allows you and other contributors to focus on the page’s content. Lightweight editing features include the following:

Edit using web browser—Edit the page as it is displayed in a browser window. You do not need to change applications or find where the page is stored.

Edit one item at a time—Edit individual items that comprise an Interact page. This enables you to add content quickly and easily, without scrolling or looking for content.

Edit items in-place—When editing an item on a page, the rest of the page remains visible and unchanged, providing you with the page’s context.

Structured editing—The author specifies the information required for an item on an Interact page. You enter the information in an editing box whose function and form the author designed.

Knowledge of HTML not required—You do not see or need to enter any HTML code. Simply enter the necessary content.

No need to lock a page—Interact manages multiple contributors editing a page. Each contributor’s edits are saved as a new version of the page, providing a history of the page’s changes. You and other contributors can determine the maximum number of versions to save.

What does an Interact page look like?

An Interact page is like any other page you would view on the web, but with added Interact functionality. As an HTML page on the web, the look and function of each Interact page can vary. When you click the page to open it, you will see the Interact features. Typical features include the page title, instructions on how to use the page, and areas where contributors add and edit items.

The sample page below shows a simple Interact page designed as a shared project page for a documentation team. A black “disclosure” triangle precedes any item that you and other contributors can edit. In this project page, you can edit the page title, the page description, the headings, and two of the items. A plus sign indicates that you can add an item to the page.



NOTE: The black triangle and plus sign are the default graphics used on Interact pages. The page author can choose to use different graphics.

XEROX DocuShare | HOME | LOGOUT | HELP

▶ **Documentation for Release 7**

Documents required for Release 7 and team members

▶ **Projects**

▶ [Enter name of project here] jhill
+

▶ **Resources**

▶ [Enter team member name and role here] jhill
+

▶ **Documentation-related Links**

+

▶ **Project-related links**

+

Clicking a black triangle opens an editing box, in which you add or change content. The author determines which fields and buttons appear in the editing box and the layout of the box.

Projects

Name of Release 7 Project

Name: User Guide

Author: jhill

created on:

OK Cancel

[Move 1 Down] Delete Control Panel

After editing the item and clicking OK, the changed content appears on the Interact page.

XEROX DocuShare® HOME LOGOUT HELP

Documents required for Release 7 and team members

Documentation for Release 7

Projects

User Guide jhill

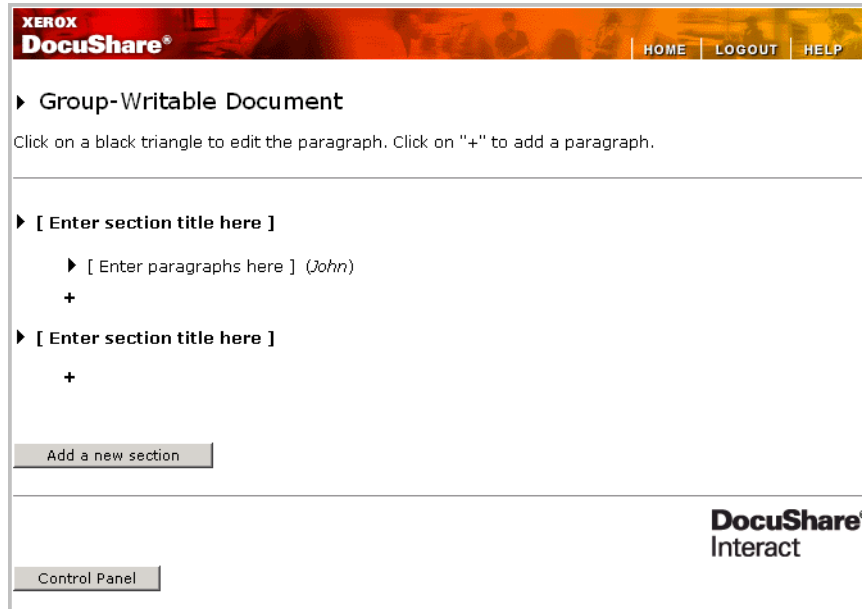
Resources

[Enter team member name and role here] jhill

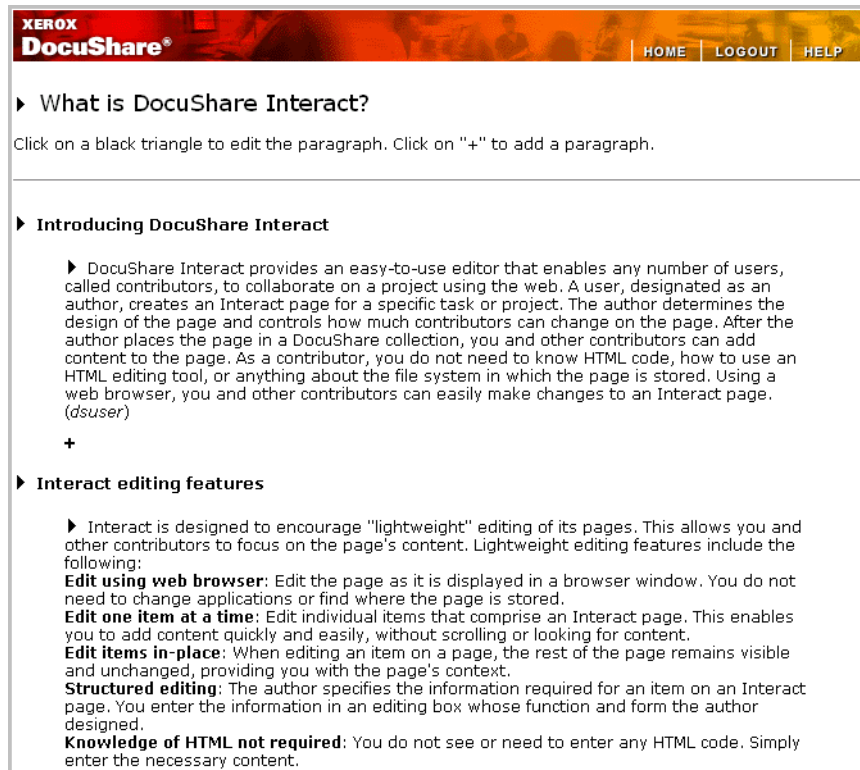
Documentation-related Links

Project-related links

The Interact page for a Group-Writable Document allows several contributors to co-author a web-based document. Contributors can add new sections to the document, change existing sections, and rearrange content.



Here is the Group-Writable Document after two contributors added content to the document.



The screenshot shows a web interface for Xerox DocuShare. At the top, there is a navigation bar with the Xerox logo and the text 'DocuShare' in a large, bold font. To the right of the logo, there are three links: 'HOME', 'LOGOUT', and 'HELP'. Below the navigation bar, the main content area is titled 'What is DocuShare Interact?' and contains a paragraph of text. Below this, there is a section titled 'Introducing DocuShare Interact' which contains a paragraph of text and a plus sign. Below that, there is a section titled 'Interact editing features' which contains a paragraph of text and a list of four editing features: 'Edit using web browser', 'Edit one item at a time', 'Edit items in-place', and 'Structured editing'. The final feature listed is 'Knowledge of HTML not required'.

XEROX DocuShare HOME LOGOUT HELP

▶ **What is DocuShare Interact?**

Click on a black triangle to edit the paragraph. Click on "+" to add a paragraph.

▶ **Introducing DocuShare Interact**

▶ DocuShare Interact provides an easy-to-use editor that enables any number of users, called contributors, to collaborate on a project using the web. A user, designated as an author, creates an Interact page for a specific task or project. The author determines the design of the page and controls how much contributors can change on the page. After the author places the page in a DocuShare collection, you and other contributors can add content to the page. As a contributor, you do not need to know HTML code, how to use an HTML editing tool, or anything about the file system in which the page is stored. Using a web browser, you and other contributors can easily make changes to an Interact page. (*dsuser*)

+

▶ **Interact editing features**

▶ Interact is designed to encourage "lightweight" editing of its pages. This allows you and other contributors to focus on the page's content. Lightweight editing features include the following:

- Edit using web browser:** Edit the page as it is displayed in a browser window. You do not need to change applications or find where the page is stored.
- Edit one item at a time:** Edit individual items that comprise an Interact page. This enables you to add content quickly and easily, without scrolling or looking for content.
- Edit items in-place:** When editing an item on a page, the rest of the page remains visible and unchanged, providing you with the page's context.
- Structured editing:** The author specifies the information required for an item on an Interact page. You enter the information in an editing box whose function and form the author designed.
- Knowledge of HTML not required:** You do not see or need to enter any HTML code. Simply enter the necessary content.

This Interact page is used to manage the user documentation development for a software release. Contributors use the page to identify the documents and resources required for the release. The page also includes links to additional sources of information.

XEROX DocuShare® HOME | LOGOUT | HELP

▶ Documents required for Release 7 and team members

▶ **Documentation for Release 7**

▶ **Projects**

▶ User Guide	jhill
▶ Quick Start Guide	santhony
▶ Idea Guide	jhill
▶ Tutorials	santhony
+	

▶ **Resources**

- ▶ **Jane Hill**, Technical Writer
- ▶ **Steven Anthony**, Technical Writer
- ▶ **Monica Lewis**, Graphic Designer
- ▶ **Gwen Herman**, Usability
- ▶ **Sam Martin**, Product Test

+

▶ **Documentation-related Links**

- ▶ User Documentation Drafts of current documentation
- ▶ Templates Documentation templates for guides and tutorials

+

▶ **Project-related links**

- ▶ Usability reports

+

2

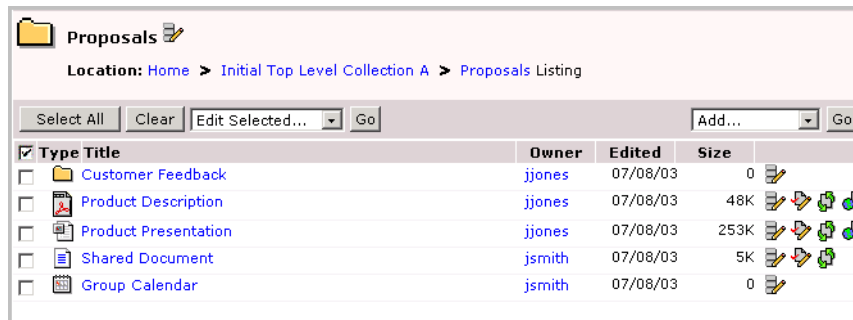
Editing Interact pages

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Accessing Interact pages

Like other DocuShare objects, Interact pages appear in collections. After creating an Interact page, the author adds it to a DocuShare collection. There may be a designated collection on your site for Interact pages or pages may be located in several site collections. The page author can provide you with the URL to a collection containing Interact pages or the URL to a specific Interact page.

An Interact page appears as an HTML document in a collection. Shown below is a collection containing an Interact page titled Shared Document.



In addition, you can add an Interact page to a collection. Interact provides several page templates that you can copy and add to a collection. See [Adding an Interact page to a collection on page 2–3](#) for more information.

Any user, either an author or a contributor, who adds an Interact page to a collection is the page's owner and has Manager access to the page. To find out more about access permissions, see [Assigning permissions to Interact pages on page 3–5](#).

Adding an Interact page to a collection

To add an Interact page, you must be logged in and have Writer access to the collection.

To add an Interact page to a collection:

1. Navigate to and open the collection to which you want to add the document.
2. From the **Add** menu, select **Interact Page**.

The Add Interact Page appears, which provides five page templates and the Table Wizard. You should not use the Table Wizard unless you also are a page author. For information on the Table Wizard, see the *DocuShare Interact Authoring Guide* on the Help Desk page.

3. To view a template before creating a new page, click a **Preview** button.
4. To add an Interact page to your collection, click the **Create New** button that corresponds to the page template you want.

The Properties page for the Interact page appears.

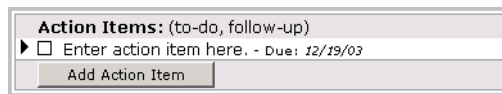
5. You can click the **Properties** tab and change any of the page's properties.
6. You can click the Interact page name displayed in the **Location** bread crumbs to open the Interact page.

Adding content to an Interact page

Using Interact's lightweight editing features it is easy to add content to a page. Provided you have Writer access to an Interact page, you can add and change content.

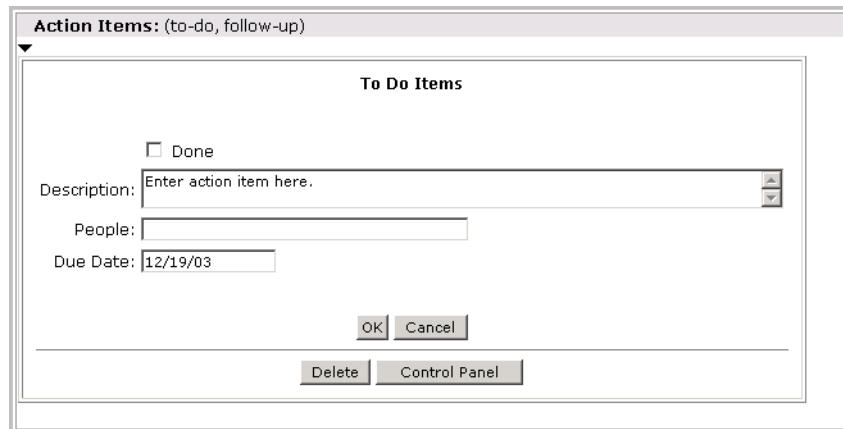
To add content to an Interact page:

1. Navigate to the collection that contains the Interact page and click its title to open it.
2. To edit an item on an Interact page, click the black triangle next to the item. The author defines the graphic used to indicate items that can be edited, but by default it is a black triangle.



A screenshot of a small, light gray dialog box titled "Action Items: (to-do, follow-up)". Inside the box, there is a list item with a black triangle icon on the left, followed by the text "Enter action item here. - Due: 12/19/03". Below the list item is a button labeled "Add Action Item".

An editing box opens in place of the item on the page. The editing box includes the current content of the item.



A screenshot of a larger, light gray dialog box titled "Action Items: (to-do, follow-up)". The dialog box has a dropdown arrow on the left. Inside, there is a section titled "To Do Items" with a "Done" checkbox. Below this, there are three input fields: "Description:" with the text "Enter action item here.", "People:" with an empty text box, and "Due Date:" with the text "12/19/03". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel". Below the dialog box, there are two more buttons: "Delete" and "Control Panel".

3. Edit the content in the fields and click **OK**.



NOTE: If you click outside of the editing box before clicking **OK**, your content is not added to the page.

The content appears on the Interact page.

Action Items: (to-do, follow-up)

- Perform technical review of User Guide. [SEaton, MLee, MGomez] - Due: 9/26/03

- To add an item on an Interact page, click the plus sign under an item. The author defines the graphic used to indicate areas where you can add items, but by default it is a plus sign.

An editing box opens.

Action Items: (to-do, follow-up)

- Perform technical review of User Guide. [SEaton, MLee, MGomez] - Due: 9/26/03

To Do Items

Done

Description:

People:

Due Date:

- Add content in the fields and click **OK**.



NOTE: If you click outside of the editing box before clicking **OK**, your content is not added to the page.

The content appears on the Interact page.

Using buttons in an editing box

The Interact author can include a variety of buttons in an item's editing box. The most common buttons are described below.

Move Up—Moves the item before other items on the page. From the menu, select how many items to move the item before.

Move Down—Moves the item after other items on the page. From the menu, select how many items to move the item after.

Move Group Up—Moves the section of items before another section on the page. From the menu, select how many sections to move the item before.

Move Group Down—Moves the section of items after another section on the page. From the menu, select how many sections to move the item after.

Indent—Moves the item in from the page margin.

Outdent—Moves the item out toward the page margin.

Archive—Removes the item from the page and moves it to another Interact page the author specified.

Delete—Removes the item from the page.

Delete Group—Removes the section from the page.




NOTE: The **Control Panel** button may appear on an Interact page. Do not use the button unless you also are an Interact author.

Entering text in editing boxes

The Interact page author can choose from a variety of fields when designing an editing box. Depending on the type of field used, you enter the information using a specific format. [Table 2–1](#) describes the types of fields and the formats allowed for entering text.

Table 2–1: Field text formats

Field Type	Format
Text (single-line)	Default size limit is 40 characters, which the author can change.
Text (multi-line)	Default size limit is three lines, which the author can change.
URL	Internet address of a web page or an image. Example: <code>http://docushare.xerox.com</code> or <code>http://docushare.xerox.com/image.gif</code> .
Date	A date in the form of mm/dd/yy or mm/dd (the current year is assumed). Example: 6/15/03.  <p>NOTE: Depending on how the author defined the Date field, the date you enter can display as Sunday, June 15 or 6/15/03.</p>
Time	A single time of day in either 24-hour (hhmm) or 12-hour (hh:mm am/pm) format. Example: 1430 or 2:30 pm (or 2:30pm).
Date and time	A date in the form of mm/dd/yy and a time in either 24-hour (hhmm) or 12-hour (hh:mm am/pm) format. Example: 6/15/03 9:00 am.
Date range	Two dates, each in the form of mm/dd/yy or mm/dd (the current year is assumed). Two fields are provided for a date range. Example: 6/15/03, 6/22/03.
Time range	Two times of day, each in either 24-hour (hhmm) or 12-hour (hh:mm am/pm) format. Two fields are provided for a time range. Example: 10:00am, 4:00pm.
Image	The URL of an image file. Example: <code>http://docushare.xerox.com/image.gif</code> .
Email address	A complete email address. Example: <code>username@mycompany.com</code> .

3

Using DocuShare features

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DocuShare features and Interact pages

As an object in a DocuShare collection, there are many tasks you can perform with Interact pages. For example, you can change an Interact page's properties and permissions, move the page to another collection, and add a subscription for a page to receive an email message when a change is made to it. If you are not familiar with DocuShare object features, this chapter describes common tasks you can perform with Interact pages. For additional information on DocuShare features, see the *DocuShare User Guide* on the Help Desk page.

Navigating to DocuShare from an Interact page

With an Interact page open, there are two ways to navigate to DocuShare to use its features:

- On the DocuShare navigation bar, click the **Home** link and navigate to your collection again.
- Click the browser's **Back** button until you return to the DocuShare collection that contains the Interact page.

Viewing and changing an Interact page's properties

Any user can view the properties of an Interact page. To change an Interact page's properties, you must be a logged-in user with Writer access to the page.

To view and change an Interact page's properties:

1. Navigate to and open the collection that contains the Interact page whose properties you want to view and change.
2. Click the **Properties** icon that appears to the right of the page's title.

The Properties page for the Interact page appears, displaying the current properties. [Table 3–1](#) describes each property.

Table 3–1: Interact page properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
Locked By	The name of the user who has the page locked.
Abstract	A summary of the Interact page's contents. The abstract appears immediately after the page is indexed.
Author	The Interact page's author or authors. An author can be someone other than the page's owner.

Table 3–1: Interact page properties

Property	Description
Content Type	The format of the Interact page, as defined by its MIME Type. An Interact page maps to the MIME Type text/html. DocuShare uses the MIME Type to open a document in the appropriate editor.
Filename	The original filename.
Max Versions	The maximum number of versions to save. For each change a contributor makes to a page, DocuShare saves a new version; the oldest version is deleted.
Size	The size of the Interact page in bytes.
Appears In	The collection(s) in which the object appears.

3. To change a property, click the **Properties** tab.
4. Change the properties you want.
5. Click **Apply** to save the changes.

Assigning permissions to Interact pages

An Interact page has a set of associated permissions called its **access list**. Permissions are the access rights that a defined set of users and groups has to view, delete, or change the web page. The page's owner or any user with Manager access to the page can assign and change the permissions.

To change an Interact page's permissions:

1. Navigate to and open the collection that contains the Interact page whose permissions you want to change.
2. Click the **Properties** icon that appears to the right of the page's title.
The Properties page for the Interact page appears.
3. Click the **Permissions** tab.
4. For **Search Available to**, click **Anyone** to allow all users to view the web page in a search results list. Click **Access List Only** to allow only those users included in the web page's access list to see the page in a search results list.
5. Check the permission boxes you want for each user and group displayed in the access list:
 - **Reader** allows the user or group to read the contents of the page and view its associated properties and permissions.
 - **Writer** allows the user or group to edit the page's properties and page contents.
 - **Manager** allows the user or group to delete the page, and change the page's access permissions and owner.
6. To save the changes you made, click **Apply**.

To change an Interact page's access list:

1. Navigate to and open the collection that contains the Interact page whose access list you want to change.
2. Click the **Properties** icon that appears to the right of the page's title.
The Properties page for the Interact page appears.
3. Click the **Permissions** tab.
4. Click the **Change Access List** button.
The Add to Access List page appears.
5. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
6. Do one of the following:
 - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
 - To display all accounts, click **Show All**.
7. In the **Possible Users/Groups** field, select the accounts to add to the access list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).

8. In the **Selected Users/Groups** field, select any accounts that you want to remove from the access list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. Click **Update Access List**.
The Permissions page appears, displaying the new access list.
10. In the **Access List**, check the permission boxes you want for each account you added.
11. Click **Apply**.

To change an Interact page's owner:

1. Navigate to and open the collection that contains the Interact page whose owner you want to change.
2. Do one of the following:
 - Click the checkbox that appears to the left of the page's title. From the **Edit Selected** menu, select **Change Owner**. On the confirmation page, click **Confirm**.
 - Click the **Properties** icon that appears to the right of the page's title. Click the **Permissions** tab and then click the **Change Owner** button.

The Change Owner page appears.

3. Do one of the following:
 - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button
 - To display all user accounts, click **Show All**.
4. Select a name from the **New Owner** field.
5. Click **Update Owner**.

The Permissions page for the Interact page appears, displaying the name of the new owner at the top of the access list. The new owner has Reader, Writer, and Manager permissions.

The name of the previous owner remains in the access list.

Locking and unlocking an Interact page

If you are the logged-in owner of an Interact page or a logged-in user with Writer access to a page, you can lock and unlock it. Locking an Interact page prevents others from editing it. A locked Interact page displays a padlock icon to the right of the page's title. To let users edit the page again, you can unlock it without adding a new version of the page.

To lock an Interact page:

1. Navigate to and open the collection that contains the Interact page that you want to lock.
2. Click the **Properties** icon that appears to the right of the page's title.

The Properties page for the Interact page appears.

3. At the bottom of the page, click the **Lock** button.

On the View page, the **Locked By** property displays your name as the user who locked the page.

4. Return to the collection that contains the page by clicking the collection title displayed after **Appears In**. The **Locked** icon appears to the right of the page's title.

Users can view the Interact page, but they cannot edit it.

To unlock a locked Interact page:

1. Navigate to and open the collection that contains the Interact page that you want to unlock.
2. Click the **Properties** icon that appears to the right of the page's title.

The Properties page for the Interact page appears.

3. At the bottom of the page, click the **Unlock** button.

On the View page, the **Locked By** property does not display a username.

4. Return to the collection that contains the page by clicking the collection title displayed after **Appears In**. The **Check Out** icon appears to the right of the page's title.

Users can now edit the Interact page.



NOTE: Clicking the **Check Out** icon also locks an Interact page. After checking out an Interact page you can unlock it using the steps above.

Viewing an Interact page's version history

DocuShare's version control feature enables you to maintain a record of an Interact page's changes. Each time a user makes a change to an Interact page, DocuShare saves a new version. For each version DocuShare keeps, you can view the version number, the date and time the web page was edited, and the user who edited the web page.

By default, DocuShare saves 50 versions of an Interact page. To change the maximum number of versions DocuShare saves, see [Viewing and changing an Interact page's properties on page 3–3](#).

To view an Interact page's version history:

1. Navigate to and open the collection that contains the Interact page whose version history you want to view.
2. Click the **Properties** icon that appears to the right of the page's title.
The Properties page for the Interact page appears.
3. Click the **History** tab.
The page displays all versions of the web page.
4. To view a specific version of the web page, click the number in the **Version #** column.
5. To return to the History page, click the browser's **Back** button.

To revert to a previous version of an Interact page:

1. On the History page, right-click the version number to which you want to revert and select **Save Target As**.
2. In the Save As window, save the page to a location on your local drive.
3. On the History page, click the **New Version** button.
4. On the Add Version page, click the **Browse** button.
5. Navigate to the location on your local drive in which you saved the page, select it, and click **Open**.
The path to the page appears in the **Filename** field.
6. Optionally, enter any comments in the **Version Comments** field.
7. Click **Apply**.

Changing an Interact page's location

You can move an Interact page to another collection or have the page appear in several collections on your site. Although an Interact page can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change an Interact page's location, you must be logged in and have Writer access to the page.

To change an Interact page's location:

1. Navigate to and open the collection that contains the Interact page that you want to move.
2. Do one of the following:
 - Click the checkbox that appears next to the page's title. From the **Edit Selected** menu, select **Change Location**.
 - Click the **Properties** icon that appears to the right of the page's title. On the Properties page for the page, click the **Locations** tab.A page appears, showing the Interact page's current location(s).
3. Do one of the following:
 - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
 - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the Interact page to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the Interact page to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).



NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the Interact page will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

The Locations page appears displaying the collection title(s) in which the Interact page now appears.

Deleting an Interact page

You can delete an Interact page from a collection if you are the logged-in owner of the page or a logged-in user with Manager access to it.

To delete an Interact page:

1. Navigate to and open the collection that contains the Interact page that you want to delete.
2. Do one of the following:
 - Click the checkbox that appears next to the page's title. From the **Edit Selected** menu, select **Delete**.
 - Click the **Properties** icon that appears to the right of the page's title. On the Properties page for the page, click the **Delete** button.

The Confirm Delete page appears.

3. Click **Delete** to remove the page from your site.

If you do not want to delete the page, click **Cancel**.

Restoring a deleted Interact page

If you accidentally delete an Interact page, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted Interact page.

Adding a subscription for an Interact page

A subscription allows you to be notified of a change to a DocuShare object. You might want to add a subscription for an Interact page to have DocuShare notify you when another user has changed the page. DocuShare notifies you by email when a change occurs. You can choose to receive immediate notification or receive a summary report on a daily or weekly basis.

You can add a subscription for an Interact page if you are logged in and have Writer access to the page.

To add a subscription:

1. Navigate to the Interact page for which you want to add a subscription.
2. Click the **Properties** icon that appears to the right of the page's title.
The Properties page for the Interact page appears.
3. Click the **Subscriptions** tab.
4. In the **Events of Interest** field, select one or more events. To select multiple events, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Period** field, select one of the following time periods:
 - **Immediate** provides notification immediately after the event occurs.
 - **Daily** provides notification in a daily summary report.
 - **Weekly** provides notification in a weekly summary report.



NOTE: DocuShare saves a new version of an Interact page after a contributor makes a change. Therefore, you may want to set the **Period** to **Daily** or **Weekly** to reduce the number of email messages you receive.

6. In the **Include Recipient Activity** field, select **Yes** to also notify the user whose action caused the subscription notification. Otherwise, select **No**.
7. Enter any optional information.
8. Click **Apply**.

The subscription does not appear as an object in a collection. Subscriptions appear on the Subscriptions page for the Interact page.

Routing Interact pages

Using DocuShare's routing capability, you can obtain feedback on the Interact page's content, receive approval of the page's content, or simply share the information in the page. On a form called a Routing Slip, you indicate the users to whom the Interact page should be sent, the type of action you want the users to take, and a message describing the routing task. You then submit the Routing Slip; DocuShare notifies the specified users of the task. While a task is in progress, you can monitor its status.

To route an Interact page:

1. Navigate to and open the collection that contains the Interact page you want to route.
2. Click the **Routing** icon that appears to the right of the page's title. A **Routing** icon does not appear if the page is locked.
The Route Documents window appears.
3. Under **Recipients**, click the **Add** button.
4. In the DocuShare Users window, place a check mark next to each user to whom you want to route the page.
5. Click the **Add** button.
6. Under **Action**, choose one of the following:

- **For Approval**—Requires users to approve or not approve the Interact page. Select **In Order** to route the page to users in the order in which they are listed in the **Recipients** field. If a user does not approve the page, it is not routed to subsequent users. Select **At the Same Time** to route the page to all users simultaneously.
- **For Review**—Allows users to provide comments and a revised version of the Interact page. The page is routed to all users at the same time.
- **For Information**—Provides the Interact page to users for information only. The page is routed to all users at the same time.

7. Under **Notify Me**, choose any of the following:
 - **Of Progress**—Notifies you of the routing process after each user action.
 - **On Completion**—Notifies you when the routing process is complete.
 - **If Not Completed By**—Notifies you if the routing task is not complete by the date you enter in the field. Either enter a date in the field or click the **Calendar** icon and select a date.

You click the **My Tasks** link on the navigation bar to check for notifications.

8. Under **Message**, do the following:
 - In the **Subject** field, enter a brief topic that appears in the notification or email that the user receives.
 - In the **Comments** field, enter a message.

9. Click **Submit**.

The Route Documents window closes.

For information on all of DocuShare's routing features, see chapter 11, Routing documents, in the *DocuShare User Guide*.