

Xerox  
**DocuShare<sup>®</sup>**

# DocuShare Interact Contributor Guide



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# Introducing DocuShare Interact

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1

## 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 adds the page to DocuShare, 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?

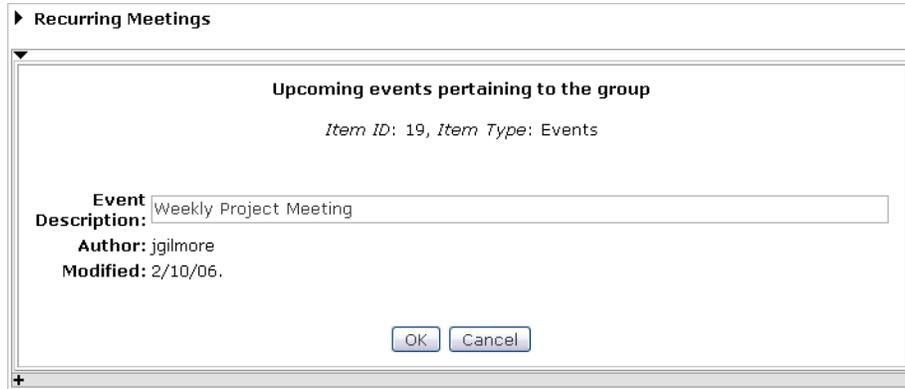
An Interact page is like any other page you would view on the web, but with added Interact functionality. As an HTML page on the web, the look and function of each Interact page can vary. When you click the page to open it, you will see the Interact features. Typical features include the page title, 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. A plus sign indicates that you can add an item to the page.

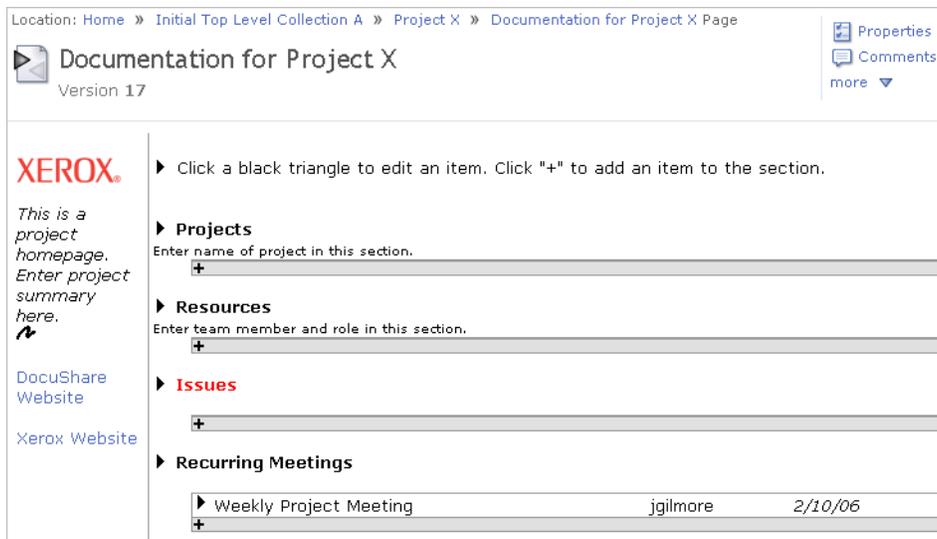
**Note:** The black triangle and plus sign are the default graphics used on Interact pages. The page author can choose to use different graphics.

The screenshot shows a web page interface for 'Documentation for Project X'. At the top, there is a breadcrumb trail: 'Location: Home » Initial Top Level Collection A » Project X » Documentation for Project X Page'. The page title is 'Documentation for Project X' with 'Version 16' below it. On the right side, there are links for 'Properties', 'Comments', and a 'more' dropdown menu. The main content area is divided into two columns. The left column features the XEROX logo and a message: 'This is a project homepage. Enter project summary here.' with a cursor icon. Below this are links for 'DocuShare Website' and 'Xerox Website'. The right column contains instructions: 'Click a black triangle to edit an item. Click "+" to add an item to the section.' followed by four sections: 'Projects' (with instruction 'Enter name of project in this section.'), 'Resources' (with instruction 'Enter team member and role in this section.'), 'Issues', and 'Recurring Meetings'. Each section has a black disclosure triangle and a plus sign icon above a horizontal input field.

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.



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



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 contributors added content to the document.

Location: [Home](#) » [Initial Top Level Collection A](#) » [Project X](#) » [What is DocuShare Interact? Page](#)

 **What is DocuShare Interact?**  
Version 6

[Properties](#)  
[Comments](#)  
[more](#) ▼

▶ This is a collaborative document page. Click on a black triangle to edit the paragraph. Click on "+" to add a paragraph. Click on "Add a new section" button to add a new section.

▶ **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 adds the page to DocuShare, 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. *(jgilmore)*

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▶ **Interact editing features**

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**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.

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**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. *(jgilmore)*

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## Accessing Interact pages

Interact pages appear in collections and workspaces. After creating an Interact page, the author adds it to a DocuShare container. There may be a designated location on your site for Interact pages or pages may appear in several locations. The page author can provide you with the URL to a container containing Interact pages or the URL to a specific Interact page. You can identify an Interact page by its icon, as shown below.



Interact icon

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

Any user, either an author or a contributor, who adds an Interact page to a container is the page's owner and has full permission to the page. To find out more about access permissions and the type of permission you need for working with Interact pages, see the *DocuShare User Guide* located on the Help Desk page.

## Adding an Interact page

To add an Interact page, you must be logged in and have the appropriate permission to the container.

To add an Interact page:

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

The Add Interact Page appears, which provides several 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* located on the Help Desk page.

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

The Add Document page appears.

5. In the **Title** field, enter a name for the Interact page. The title should be short, but descriptive, and can contain spaces and punctuation marks.
6. Enter any optional information. Click a field name for a description of each property.
7. Click **Apply**.

The Interact page is added to the container.

## Adding content to an Interact page

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

To add content to an Interact page:

1. Locate the Interact page that you want to edit 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.



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

► This is a to-do list page. Click the "New Item" button below to add a to-do item.

▼

**Prioritized Task**

Item ID: 4, Item Type: prioritized\_task

Done

Priority: 9 ▼

Description: Click the black triangle to edit a to-do item.

People:

Due Date: 4/5/06

OK Cancel

Add a new item below Delete Control Panel

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

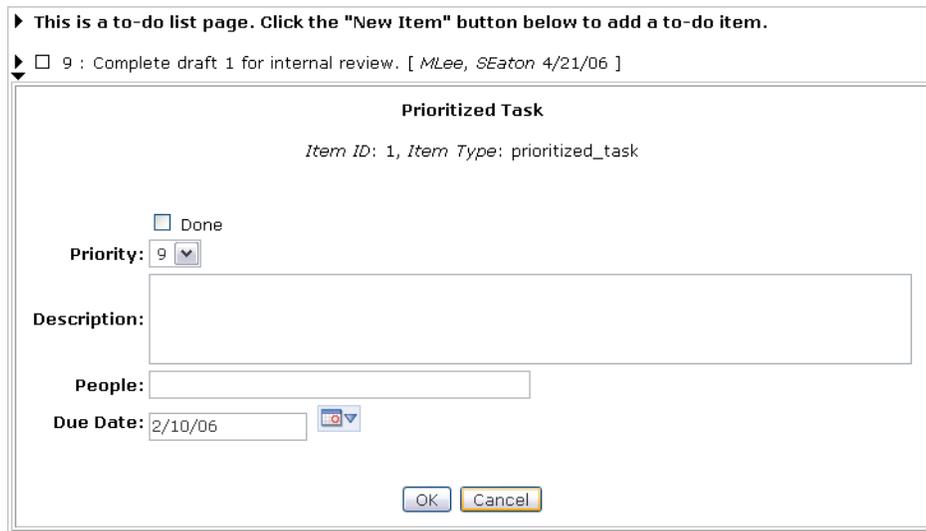
**Note:** If you click outside of the editing box before clicking **OK**, your content is not added to the page.

The content appears on the Interact page.



4. To add an item on an Interact page, click the **New Item** button. The author defines the graphic used to indicate areas where you can add items.

An editing box opens.



▶ This is a to-do list page. Click the "New Item" button below to add a to-do item.

▶  9 : Complete draft 1 for internal review. [ MLee, SEaton 4/21/06 ]

**Prioritized Task**

*Item ID: 1, Item Type: prioritized\_task*

Done

Priority: 9 ▼

Description:

People:

Due Date: 2/10/06

5. 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.

**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: 4/12/06. <b>Note:</b> Depending on how the author defined the Date field, the date you enter can display as Wednesday, April 12 or 4/12/06.
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: 4/12/06 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: 4/12/06, 4/14/06.
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> .

## DocuShare features and Interact pages

As an object in a DocuShare collection or workspace, there are many tasks you can perform with an Interact page. For example, you can change an Interact page's properties and permissions, move the page to another location, and add a content rule for a page. If you are not familiar with DocuShare object features, see the *DocuShare User Guide* located on the Help Desk page.

