

FileSphere Personal Administration Help



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Help system updates:

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Version	Date	Detail	FileSphere Release
4.1.1	09/2007	New feature: <ul style="list-style-type: none">• Direct email of document shortcuts (Send to Mail Recipient)• Insert field (FileSphere metadata field) Addition of support for: <ul style="list-style-type: none">• Microsoft Office 2007 (Microsoft[®] Excel[®], Microsoft[®] PowerPoint[®], Microsoft[®] Project, Microsoft[®] Visio[®], Microsoft[®] Word)• Windows Vista™• Adobe[®] Acrobat[®] 8.0 Professional	4.1.234
4.1.0	06/2007	FileSphere Personal 2008 release Addition of support for: <ul style="list-style-type: none">• Microsoft[®] Project, Microsoft[®] Visio[®]	4.1.225
3.1.4	11/2006	Review & update	3.1.218
3.1.3	07/2006	Review & update	3.1.215
3.1.2	01/2006	Addition of <ul style="list-style-type: none">• Support for Microsoft[®] .NET Framework 2	3.1.201
3.1.1	11/2005	Addition of <ul style="list-style-type: none">• File access levels	3.1.196
3.1.0	10/2005	First issue for FileSphere 2006, which includes <ul style="list-style-type: none">• Oracle support and SQL Server SP4 support• Addition of email activity log to FileSphere Administration Audit section	3.1.191



Please always check the FileSphere website www.filesphere.com for the latest documentation.

To update the online Help Systems:

- ▶ Download the latest versions of User and Administration Help from the website
- ▶ Rename the User Help to FileSphere.chm and the Administration Help to FileSphereAdmin.chm
- ▶ Copy the help files into the FileSphere Help folder, overwriting the previous versions. You will find the FileSphere Help folder in the location in which FileSphere was installed, the default location is C:\Program Files\FileSphere Enterprise\Help

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FileSphere technology patent pending.



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About FileSphere Help

FileSphere includes documentation in two online help file systems: **User Help** and **Administrator Help**.

The **User Help** system provides information on all aspects of FileSphere required for everyday document management. You can access **User Help** in the following ways:

- ◆ Press the **F1** key or select **Help Topics** from the **Help** menu in **Windows Explorer** when a FileSphere space is selected
- ◆ **Windows Start** menu, point to **Programs**, point to **FileSphere Enterprise**, select **Help**

The **Administrator Help** system (this help system) provides information required for setting up, administering and maintaining FileSphere.

You can access **Administrator Help** in the following ways:

- ◆ **Windows Start** menu, point to **Programs**, point to **FileSphere Enterprise**, select **Administrator Help**
- ◆ Press the **F1** key or the **Help** button on the **FileSphere Administration** console toolbar

Related documentation

Other documentation available in the FileSphere documentation suite includes:

Document	Format	Available from
◆ Getting Started	PDF	Installation CD
◆ Quick Tour	HTML	www.filesphere.com
◆ Self-paced Tutorial	PDF	Installation CD
◆ User Help in document format	PDF	Installation CD
◆ Administrator Help in document format	PDF	Installation CD
◆ Installation, Administration & Technical Reference Guide	PDF	info@filesphere.com



See also

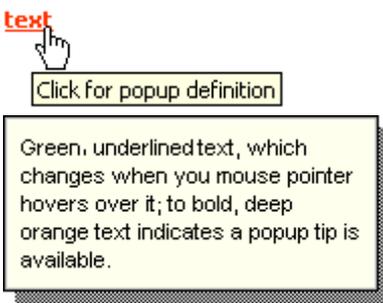
[Help system conventions](#)

[Glossary](#)



Help system conventions

This section explains the conventions used to denote FileSphere spaces and functions and the icons used to denote notes or advice to the reader.

When you see...	This means...	An example of this is...
Blue, underlined text , mouse pointer changes to a hand when it hovers over it.	Indicates a link to another topic in this help system.	Documents and/ or schemas can be recovered by running the Document Recovery Wizard
Blue, underlined text , which changes when your mouse pointer hovers over it; to bold, deep orange text and displays a popup message	Indicates a popup tip: click on the tip to display a popup text box which provides a short description of the item.	
Bold dark blue text	A major component of FileSphere, such as a space or folder.	All documents are displayed in the Document Space
Bold dark yellow text	A reference to Microsoft Windows, Office or Outlook.	In the Windows Explorer view of FileSphere...
Bold deep orange text	A FileSphere specific item or function	▶ Click the FileSphere menu
Bold light blue text on light grey background	A FileSphere specific button or menu item	▶ Click the Open button or select Open from the FileSphere menu
▶ Solid dark blue arrow bullet point	An action to be taken by the reader	▶ Right click on a document and select Remove
Bold black text	What a user is required to enter, click or select	▶ Right click on a document and select Remove
◀ Solid light blue reverse arrow bullet point	An action taken by FileSphere	◀ FileSphere places a copy of the document in your Workspace
Bold grey text on light grey background	A generic Windows button	▶ Click the OK button
Bright blue text	A document property tag	The properties of Project , Task , Client and Product are displayed on the View By menu
Italic bright blue <i>text</i>	A property tag <i>value</i>	Product folders were displayed for <i>Product X</i> , <i>Product Y</i> and <i>Product Z</i>
Dark red text	Status of a FileSphere document	This changes the document's Status in the Document Space to Checked Out
Bold white text on dark grey background	A page / window / dialog box name	The Properties dialog box displays four tabs
Bold deep orange Text with a grey background	A dialog box tab name	▶ Click the Options tab
Bold, italic, right blue text	An optional alternative	▶ Click the Open button or select Open from the FileSphere menu
Bold purple text	A reference to a related document or website	The latest information is available from the FileSphere website, www.filesphere.com



Light blue text in square brackets	Navigation to access the item or function described	[Navigation: FileSphere icon > Document Space > Document]
	Indicates links, which describe How to perform/access functionality described in the current topic.	 How to Open previous versions
	Indicates links to topics that are related in some way to the current topic.	 See also Deleting previous versions
	A note below a topic that gives extra information about the topic.	 NOTE These documents can be restored from the Shredder .
	A warning note	 If you select this option documents will be permanently deleted from FileSphere
	A paragraph that provides hints, tips and recommendations for working with FileSphere.	 You can collapse View Folders by clicking the View By button
	Refers to a function that should be carried out by advanced FileSphere users (power users) only	 Only users that have a good working knowledge of FileSphere, should attempt this.
	Refers to a function that is restricted to users with administrative level access rights	 You must have document management access rights to change document security
	Refers to a FileSphere Administrator function	 Setting up and managing schemas is a FileSphere Administration task restricted to users with Document Manager access rights.
Bold deep red text	Refers to the FileSphere Administration console	
Magenta text	Indicates restricted access rights to a function	
Bold teal text	A FileSphere Administration component or object	The Notification service tracks system events and provides notification of when they occur



See also

- [About FileSphere Help](#)
- [Glossary](#)



Glossary

FileSphere icons are displayed in Windows Explorer and the Open and Save dialog boxes of Microsoft Word, Excel and PowerPoint.

FileSphere buttons are displayed on: the Standard toolbar in Windows Explorer and Microsoft Word, Excel and PowerPoint Open and Save dialog boxes; and the Filesphere toolbar in Microsoft Word, Excel and PowerPoint.

Add Documents button		The Add Documents toolbar button opens the Open window to allow you to locate and select documents to add to FileSphere.
Document Space		A Document Space is a central repository of FileSphere documents on your local computer or on a networked computer (Network Peer). Documents are added, classified, retrieved, edited and tracked in the Document Space . Documents are checked in and out of the Document Space to automatically maintain version control.
Export to PDF button		If the FileSphere PDF Add-in is installed, a FileSphere PDF Creator option is added to the list of available printers and an Export to PDF button is added to the Filesphere toolbar in Microsoft Word, Excel and PowerPoint . It creates a PDF file of the active document and saves it into FileSphere.
Favorites		The Favorites space, found under My Workspace , gives you quick access to documents through a list of document shortcuts. Favorites can include shortcuts to documents in your Document Space or any Network Peer on your organisation's network.
FileSphere icon		The FileSphere icon marks the boundary of FileSphere on your computer.
Finalize button		On the Filesphere toolbar in Microsoft Word, Excel and PowerPoint . Finalizes (publishes), closes and returns the active document.
Ghost Folder		Ghost Folders are dynamic virtual folders used for classifying documents. Unlike View Folders they do not contain documents, they simply represent a property and a property value that exists in FileSphere but with which no documents are classified in the current view. A document inherits this property value when added to a Ghost Folder . Ghost Folders can be created using the New Folder button.
Ghost Folder button		The Ghost Folder toolbar button turns display of Ghost Folders on/ off .
History button		The History toolbar button turns display of the History pane on/ off in My Workspace, In Tray or Out Tray .
In Tray		The In Tray is located in My Workspace . It holds documents sent to you by other FileSphere users (until you open, reject or forward them).
My Workspace		My Workspace is your personal workspace, similar to your desk area. It holds copies of documents that you are working on and is the first space displayed beneath the FileSphere icon. Documents in My Workspace are checked out from the Document Space and cannot be edited by others. My Workspace has an In Tray , an Out Tray and a Favorites space in which you can keep links to documents that you access frequently.
Network Peer		A Network Peer is another Document Space on your organisation's network. It may be the local Document Space of another FileSphere user or a central Document Space on a network server.
New Folder button		The New Folder toolbar button creates a new folder for the currently selected property . The button arrow allows you to select a property to create New Folder from.
Open		On the Filesphere toolbar in Microsoft Word, Excel and PowerPoint . Displays the Open dialog box to allow you to select a FileSphere document to open.
Out Tray		The Out Tray is located in My Workspace . It holds documents you have sent to other FileSphere users (until they open or reject them).



Pickup Folder		<p>Pickup folders provide you with a location in which you can save documents from a non-integrated application so that they are automatically added to FileSphere. Without Pickup folders, you first need to create the document and then add it to FileSphere in the Windows Explorer view.</p> <p>A Pickup folder can have its own classification settings that will apply to all documents added to FileSphere from that folder. You can also choose to delete files from Pickup folders once they have been added to FileSphere.</p> <p> Pickup folders are set up in FileSphere Administration and FileSphere Administrator access rights are required.</p>
Retrieval Bar		The Retrieval Bar is displayed at the top of the Document Space contents pane. To quickly locate documents, you can enter document property and value selections, aided by the quick prompts.
Retrieval Bar button		The Retrieval Bar toolbar button turns display of the Retrieval Bar on/ off .
Retrieve using values button		The Retrieve using values button, displayed on the right side of the Retrieval Bar , toggles between using properties or values and properties for retrieval.
Save		On the FileSphere toolbar in Microsoft Word , Excel and PowerPoint . Saves the active document in FileSphere.
Search		If you are unable to locate files using the Retrieval Bar ; or View By to create View Folders ; or if you just prefer to search for documents, FileSphere provides you with a Quick Search Toolbar and an Advanced Search .
Search button		The Search button turns display of the Quick Search Toolbar and search results pane on/ off .
Shredder		Shredder is FileSphere's equivalent of a recycle bin, which stores FileSphere documents as you delete them. Documents can be permanently deleted or restored from the Shredder .
Static Folders		Static Folders are regular Windows folders. They can be used to add documents contained in an existing folder hierarchy to FileSphere to assist in the document migration process. They can also be used solely as a wrapper to maintain a specific association between certain documents.
Templates		Templates is a reference folder, associated with your default Document Space , in which you can keep links to copies of important templates, master documents and proformas. Opening a document from Templates opens an editable copy of the document, while preserving the original document.
Unclassified button		The Unclassified toolbar button turns display of documents that are unclassified for the current View (the currently selected property) on/ off .
View By		View By is the action of selecting a property to group documents by. Documents are grouped into View Folders for each value found for the selected property. View By is accessed using the View By button or the View By menu option on the right click menu of Document Space , Network Peer , Shredder or Templates .
View By button		The View By toolbar button turns View Folders for the currently selected property on/ off . The button arrow allows you to select a property to create View Folders from.
View Folder		View Folders are dynamic virtual folders created by grouping documents with common classification. They are used for classifying, filtering and retrieving documents. Each View Folder represents a property and a property value . A document inherits this property value when added to a View Folder . View Folders are created by using the View By function and selecting a property , which groups the documents with the same value for the selected property . View By can be repeated within a View Folder to create a hierarchy of folders.



See also

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What is FileSphere?

FileSphere is an electronic mail, document and file management system. It provides automatic classification and automatic version management together with a natural way of storing, retrieving, managing and sharing most common types of files, including email, Microsoft Office document, Adobe PDF document, scanned document, text, image, spreadsheet, presentation, music and video. [^top](#)

Zero Interface email & document management

FileSphere is a zero interface application because it is embedded in **Microsoft Office** and **Adobe Acrobat Professional**, and it requires no separate application interface. This provides users with the power to manage all documents, including emails, from within **Windows Explorer; Microsoft Word, Excel, PowerPoint** and **Outlook**; and **Adobe Acrobat**. Emails and email attachments can be classified and added to FileSphere individually from **Microsoft Outlook** or they can be automatically captured and classified from the **Inbox** or the **Outbox**, using **Microsoft Outlook Rules**.

Optional FileSphere add-ins provide additional zero interface embedded functionality. The FileSphere PDF Add-in enables the simultaneous creation, classification and addition of PDF files to FileSphere from within any application and the Lotus Notes Add-in enables emails and attachments to be added directly to FileSphere from within Lotus Notes.

FileSphere also enables regular file system folders and **Microsoft Outlook** Inbox folders to be designated as pickup folders with specified classification. Files copied to, or saved in, a FileSphere pickup folder are automatically added to FileSphere and classified, according to the folder's pre-defined classification. [^top](#)

How FileSphere operates

FileSphere operates by providing a **workspace**, from where you can manage, classify and retrieve emails, documents and files. A system of checking documents in and out of the **document space** is used to control versioning.

A local workspace, **My Workspace**, indicates documents that have been checked out or are being worked on. [^top](#)

Simple sharing & collaboration

FileSphere can be set up to allow local, central or combined local and central management of documents. File sharing is achieved by connection to **document spaces** of other computers, referred to as **Network Peers**. The FileSphere **In Tray** and the **Out Tray**, located in **My Workspace** facilitate collaboration between FileSphere users. [^top](#)

Which edition of FileSphere?

In small to medium enterprises with a distributed environment, **FileSphere Professional** is designed to act as both a server and a client. Each user can manage documents locally in their own **Document Space** and, by connecting to **Network Peers**, they can share their **Document Space** as well as access the **Document Spaces** of other users.

FileSphere Enterprise is specifically designed to perform the server role in a centralised environment, with **FileSphere Professional** as the desktop client. **FileSphere Enterprise** provides a centralised environment for security, auditability and management of users, documents and applications.

FileSphere Personal is a standalone edition that provides the document management functionality of **FileSphere Professional** but has no document sharing and collaboration ability, no automatic email capture and fewer administrative tools. [^top](#)

Intuitive classification

Classification occurs automatically when you add documents to FileSphere because the document's native application (file type) properties (metadata) are transferred to FileSphere. For example, a **Word** document, a **PowerPoint** presentation and an **Excel** spreadsheet will bring with them **Tile, Subject, Author** and **Company**; an **MP3** music file will bring with it **Album, Track, Artist**,



Composer and **Genre**; an email will bring with it **From/To, Cc, Bcc, Date Sent/Received** etc; and an **Adobe** PDF document will bring with it **Title, Subject** and **Author** (support for Adobe XMP metadata is built into FileSphere). If you wish to see what type of properties are transferred with a document to FileSphere, when the document is open select **Properties / Document Properties** from the **File** menu.

Further classification can be given to documents using simple drag & drop or easily accessible classification prompts in document properties in **Windows Explorer** or when documents are being saved in **Microsoft Office** applications. Additional classification is based on business schemas, which can be fully customised to suit the classification requirements of your organisation. [^top](#)

Virtual folders

Instead of storing your documents in a traditional hierarchical folder structure, FileSphere simply tags your documents and uses the tags to group documents into virtual **View Folders**. FileSphere tags, which are made up of **property** and **value** pairs provide extensive document classification and retrieval capabilities.

FileSphere's virtual and approach with the function creates a dynamic environment in which different **Views** of documents can be created, allowing you to arrange, rearrange and view documents according to their **property** tags and your particular way of working. You can still create an hierarchy of **View Folders**, but the added benefit of FileSphere is that you can create the hierarchy in any order and then change the order if required.

View and **Ghost Folders** are dynamic virtual folders, which allow documents to learn about their environment. As you move documents into a **View** or **Ghost Folder**, they inherit the attributes (tags) of the **Folder**. If you move documents into a dynamic hierarchy of **View** and **Ghost Folders**, they inherit the tags of every **View** or **Ghost Folder** in the hierarchy. **Ghost Folders** are empty **View Folders** which are created to provide classification of documents, where no documents exist for a particular **View** (hierarchy of **View Folders**).

The dynamic nature and flexibility of **View Folders** allows different users to interact with the same documents in different ways. For example the Product Development department may **View** (sort) documents by **product, model** and **launch date**, while the Marketing department **View** the same files organised by **client** and **campaign**. [^top](#)

Easy Retrieval without searching

When you use FileSphere, you no longer need to search through a static folder hierarchy to locate a document because FileSphere presents you with documents, in a hierarchy of **View Folders**, which you create based on the **property value** tags that you select. A provides you with, easy to select, prompts to help you drill straight through a **View Folder** hierarchy to the document you require. [^top](#)

Restricted access levels

File access can be restricted to specified users or user group by assigning predefined access levels to documents. Users are only able to see files to which they have access. [^top](#)

Document shortcuts

FileSphere allows shortcuts to FileSphere documents, similar to Windows shortcuts, to be created on the desktop or in the file system. These shortcuts can be sent to other FileSphere users to provide them with direct access to a document. [^top](#)

Migration

_, which are traditional Windows Explorer folders can also coexist within FileSphere. You can use the **Migrate** function from a **Static Folder** to assist your transition to FileSphere from your existing folder structure. [^top](#)



See also

- [Features comparison](#)
- [FileSphere Personal installation requirements](#)
- [FileSphere Professional installation requirements](#)
- [FileSphere Enterprise installation requirements](#)



Features

This table describes and compares the main features of

- ◆ FileSphere Personal - standalone desktop client
- ◆ FileSphere Professional - desktop client
- ◆ FileSphere Enterprise/Professional - server edition

DOCUMENT CLASSIFICATION & RETRIEVAL			
Feature	Personal	Professional	Enterprise/ Professional
<p>Metadata Based Document Classification Provides a business layer for classifying documents based on characteristics they have in common. Documents can be classified according to industry specific, business specific or customisable metadata schema relevant to the user and the organisation. This allows documents to convey meaning that is not conveyed by the name of the document and makes it easy to detect duplicate documents.</p>	✓ single customisable schema	✓	✓
<p>Dynamic Document View Users can dynamically organise the document store into a personalised view based on the user's metadata selection. This allows users to navigate through a large document store to find documents quickly.</p>	✓	✓	✓
<p>Drag and Drop Classification Users can simply drag and drop documents into a folder to automatically classify them. This dramatically reduces the time taken classify documents when compared against most present day solutions.</p>	✓	✓	✓
<p>Enforced Classification Document classification can be enforced throughout an organization using schema properties ensuring essential metadata elements have values.</p>	✓	✓	✓
<p>Enterprise Navigation By allowing users to dynamically organise their document hierarchy, they can navigate to documents quickly and no longer need to remember the names of documents or their storage location to find files.</p>	✓	✓	✓
<p>Enterprise Search Provides comprehensive keyword search functionality within document content, metadata values and metadata attributes across the entire document store. This allows users to quickly find all documents relevant to a particular keyword.</p>	✓	✓	✓
<p>Internet, Web Portal and Desktop Access By allowing users to dynamically organise their document hierarchy, they can navigate to documents quickly and no longer need to remember the names of documents or their storage location to find files.</p>			
<p>◆ FileSphere's Desktop Toolbar allows quick access to documents and document spaces from the user's enterprise desktop.</p>	✓	✓	✓
<p>◆ FileSphere's RetrieveAll Toolbar simplifies document access providing the power of the FileSphere's Windows Explorer Retrieval Bar on the user desktop or from within an enterprise Portal.</p>	✓	✓	✓
<p>◆ FileSphere's Web Interface allowing remote or mobile users to quickly manage documents from wherever they are</p>	✓	✓	✓
DOCUMENT LIFECYCLE MANAGEMENT			
<p>Document Templates Template documents can be accessed through the Template space providing unified and quick access to an organisation's standard templates and master documents.</p>	✗	✓	✓
<p>Creating and Adding Documents New documents can be created and automatically classified from within FileSphere's Windows Explorer interface. Documents can also be manually added using drag and drop or using right click from the local file or from within FileSphere's Windows Explorer interface.</p>	✓	✓	✓
<p>Existing documents can be automatically added and classified from the local file system using Pickup Folders.</p>	✗	✓	✓
<p>Automated Document Versioning</p>	✓	✓	✓



Document versions are controlled automatically, with versioning automatically performed when documents are opened for editing (checked out) and returned (checked in).

Document Publishing / Finalization

Documents can be marked as finalized, once published. Comments can be added to the document and the major version is automatically updated.

✓ ✓ ✓

PDF Conversion

Using the FileSphere PDF Add-In, files can be converted to PDF classified and added to the file repository from within any supported application.

✗ ✓ ✓

Document Retention

Individual documents or groups of documents can be set to expire on a certain date. Expired documents are moved into an 'expired' section, where an administrator is responsible for their removal and archiving, once this date is reached.

✗ ✓ ✓

Document Disposal

Deleted documents are sent to the Shredder where they are removed from the file store. An administrator is then responsible for their ultimate removal from the system.

✗ ✓ ✓

Document Migration

The migration utility allows file system folder hierarchies to be moved or copied into the repository and the documents, contained within, to be migrated using smart classification.

✓ ✓ ✓

DOCUMENT COLLABORATION & WORKFLOW

Personal Workspace

FileSphere provides a virtual office desktop, with:

- ◆ **My Workspace** – a space for active documents
- ◆ **In Tray** – a space for documents received from peers
- ◆ **Out Tray** - a space for documents sent to peers
- ◆ **Favourites** - a space for shortcuts to commonly accessed documents

✓
✗ ✓ ✓
✗ ✓ ✓
✓ ✓ ✓

Each of these spaces contains a history pane, providing a comprehensive log of activity for security and audit purposes and as 'recent documents'.

Document Status

Document status details, such as checked in, checked out, finalised, number of versions, are clearly displayed to all users

✓ ✓ ✓

Document Sharing and Review

To facilitate document review and assist work processes, users can send other FileSphere users documents or shortcuts to documents. Shared documents include tracking, showing the sender, the time and any additional comments.

✗ ✓ ✓

Sent and Received Document Notification

A system tray message notifies users when documents are sent or received. Documents are automatically added to the user's In Tray when received and a log of the transaction is added to the sending user's Out Tray.

✗ ✓ ✓

Offline Document Editing

Documents opened for editing are checked out to a user's Workspace. A local copy of the document allows the user to disconnect from the central file store with the document available for checking in when editing is complete and once the user is back online.

✓ ✓ ✓

Document and Document Group Shortcuts

Shortcuts to FileSphere documents and groups of documents can be created outside FileSphere. FileSphere Shortcuts can then be used for linking to files or for file sharing and collaboration in a similar way that standard Shortcuts operate within the file system.

✗ ✓ ✓

Automated Document Capture

Files can be automatically classified and added to FileSphere from within any supported application by using designated pickup folders on the file system.

✗ ✓ ✓

Scanner Integration

Scanned images can be added to the file store directly from any Twain compatible device including scanners and digital cameras.

✗ ✓ ✓

Fax and Printer Integration

Any electronic files can be automatically classified and added to FileSphere from designated pickup folders on the file system.

✗ ✓ ✓

ADMINISTRATION & SECURITY

**Central Management**

Administration, file management and information storage and is performed centrally to ensure the implementation of enterprise wide policy and security and to prevent unauthorised file access.

✗ ✗ ✓

Microsoft Active Directory Support

Supports Windows Active Directory, allowing administrators to centrally manage authentication and authorization services, assign policies and deploy software updates directly to client systems.

✗ ✗ ✓

Comprehensive Administration

The administration console provides access to all administrative tasks including security and access control; auditing, monitoring and activity logs; classification schemas; services; file storage settings; and management of deleted and expired documents and versions.

✗ classification admin only ✓ ✓

Document Level Access Control

Similar to Windows, users and group access can be granted/denied to individual documents or groups of documents.

✗ ✓ ✓

User and Group Access Control

File access can be controlled by assigning groups or users to specified access levels and then assigning access levels to documents. Users can only see files to which they have access.

✗ ✓ ✓

History and Audit Trail

Maintains full document lifecycle and historical information for each file and its revisions. Information is kept about each document transaction including the type of access, the time and date and credentials of the user who accessed it. All activity logs are sortable and exportable with document history logs able to be exported to plain text or comma delimited CSV file.

✗ ✓ ✓

Multiple Document Repositories

Multiple document spaces can be used to cater for situations where separate business divisions each require a separate repository. Each file repository can be physically distributed across multiple drives to increase efficiency and capacity, appearing as one repository to the user.

✗ ✗ ✓

Enforced Use of Document Management

FileSphere can be configured, using Windows Group Policy, to enforce saving of files to the file store from within Microsoft Office applications. This prevents users from creating and saving Microsoft Office files on their local files systems.

✗ ✓ ✓

Files Maintained in their Native Format

FileSphere maintains files in their native format, enabling administrators to restore files without having to use FileSphere.

✗ ✓ ✓

Backup and Restore

To backup the entire file repository, including files, versions, metadata and schemas, FileSphere provides a Backup and Restore tool. Backup's can be used to transfer a file store from one repository to another or for backing up the repository.

✗ ✓ local ✓ centralised

Import and Export

FileSphere maintains files in their native format, enabling administrators to restore files without having to use FileSphere.

✗ ✓ ✓

Scalability and Performance

To enhance performance and scalability, FileSphere Enterprise utilises Microsoft Internet Information Services for enhanced web services communications and Oracle or Microsoft SQL Server for enhanced file metadata management.

✗ ✓ ✓

ENTERPRISE INTEGRATION & EMAIL MANAGEMENT**Microsoft Outlook Integration**

Allows classification and automatic addition of individual emails and attachments to the file repository from within Microsoft Outlook using email rules or folder property rules.

✓ save into FileSphere only, no rules ✓ ✓

Mail Server Integration

Allows classification and automatic addition of individual emails and attachments to the file repository directly from email servers using server rules.

✗ ✗ ✓

Enterprise Desktop Integration

FileSphere is embedded in the Microsoft Windows Explorer providing a familiar application interface for users. It is integrated with Microsoft Office and OpenOffice applications, and supports Adobe Acrobat Professional and Lotus Notes.

✗ ✗ ✓



Client API

FileSphere API's provide third party organisations a development interface for integrating information management into any enterprise or web application.



See also

[FileSphere Personal installation requirements](#)

[FileSphere Professional installation requirements](#)

[FileSphere Enterprise installation requirements](#)

[About FileSphere](#)



Personal requirements

Desktop Installation

Minimum System Requirements

- ◆ Intel Pentium III processor 850 MHz or AMD Athlon.
A more powerful processor may be required depending on the requirements of the operating system.
- ◆ 512 MB of RAM. Additional memory may be required depending on the requirements of the operating system.
- ◆ 120 MB of free hard disk space
- ◆ Sufficient space for document storage.

Software Requirements*

- ◆ Microsoft Windows XP (Professional/Home Edition) (SP1 & SP2 supported) or Microsoft Windows 2000 Professional (SP4)
- ◆ Internet Explorer 6.0 (SP2) or 7.0
- ◆ Microsoft .NET Framework 2.0

Optional Integration Applications*

- ◆ Microsoft Office 2003/XP/2000 (Word, Excel, PowerPoint and Outlook)
- ◆ Adobe Acrobat 7.0 Professional
- ◆ OpenOffice.org 2.0 or higher
- ◆ MSN Messenger and Windows Messenger

*The latest updates and patches are required for software requirements and integrated applications.



Please visit www.filesphere.com for the latest information.



See also

- [FileSphere Professional installation requirements](#)
- [FileSphere Enterprise installation requirements](#)
- [About FileSphere](#)
- [Features - Professional & Enterprise](#)



Professional requirements

Desktop Installation

Minimum System Requirements

- ◆ Intel Pentium III processor 850 MHz or AMD Athlon.
A more powerful processor may be required depending on the requirements of the operating system.
- ◆ 512 MB of RAM. Additional memory may be required depending on the requirements of the operating system.
- ◆ 120 MB of free hard disk space
- ◆ Sufficient space for document storage.

Software Requirements*

- ◆ Microsoft Windows XP (Professional/Home Edition) (SP1 & SP2 supported) or Microsoft Windows 2000 Professional (SP4)
- ◆ Internet Explorer 6.0 (SP2) or 7.0
- ◆ Microsoft .NET Framework 2.0

Optional Integration Applications*

- ◆ Microsoft Office 2003/XP/2000 (Word, Excel, PowerPoint and Outlook)
- ◆ Adobe Acrobat 7.0 Professional
- ◆ OpenOffice.org 2.0 or higher
- ◆ MSN Messenger and Windows Messenger

*The latest updates and patches are required for software requirements and integrated applications.



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See also

- [FileSphere Enterprise installation requirements](#)
- [About FileSphere](#)
- [Features - Professional & Enterprise](#)
- [FileSphere Personal installation requirements](#)



Enterprise requirements

Server Installation*

Minimum System Requirements

These requirements represent the *minimum* hardware specifications required to run FileSphere Enterprise.

- ◆ Intel Pentium 4 processor 2.4 GHz or equivalent.
A more powerful processor may be required depending on the requirements of the operating system.
- ◆ 1 GB of RAM. Additional memory may be required depending on the requirements of the operating system. 2 GB RAM or more is recommended.
- ◆ 120 MB of free hard disk space. This excludes space required for document storage.
- ◆ Sufficient space for document storage (4 GB min)
It is recommended that a projection be made of your organisation's storage growth rate for the coming years. Adequate storage should be installed in the server to accommodate this projection.

Software Requirements*

- ◆ Microsoft Windows 2003 Server or Microsoft Windows 2000 Server
- ◆ Internet Explorer 6.0 SP2 or 7.0
- ◆ Microsoft .NET Framework 2.0
- ◆ Microsoft Internet Information Services (IIS) with ASP.NET enabled.
- ◆ Access to a Microsoft SQL Server 2005/2000 (SP4) or an Oracle 10g/9i database server. The database server may be installed on the same computer or available via a network.

Optional Integration Applications*

- ◆ Microsoft Office 2003/XP/2000 (Word, Excel, PowerPoint and Outlook)
- ◆ Adobe Acrobat 7.0 Professional
- ◆ OpenOffice.org 2.0 or higher
- ◆ MSN Messenger and Windows Messenger

**The latest updates and patches are required for software requirements and integrated applications.



Please visit www.filesphere.com for the latest information.



See also

- [About FileSphere](#)
- [Features - Professional & Enterprise](#)
- [FileSphere Personal installation requirements](#)
- [FileSphere Professional installation requirements](#)



Property settings

[FileSphere properties](#)

[General properties](#)

[Options settings](#)

[File types settings](#)

[Document Space properties](#)

[General properties](#)

[Document types](#)

[File storage](#)

[Hints](#)



FileSphere properties

FileSphere property settings are for viewing license key details, layout options and prompt settings and special file types. Property settings can be accessed from the right click menu of the **FileSphere** icon (on the desktop, in the **Windows Explorer** view or in the **FileSphere Administration** console).

[Navigation: FileSphere icon menu > **Properties**]

To access property settings

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **General** tab.
- ◀ The **Properties** dialog box allows you to view/ edit the following property settings by clicking on the appropriate tab :



How to

[View general properties](#)

[Edit options settings](#)

[Edit file types settings](#)



General properties

General properties provide FileSphere version and license details.

[Navigation: FileSphere icon menu > Properties > **General**]

To access general properties

▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **General** tab.

The following information is displayed:

	FileSphere Personal (version number) Copyright notice.
Product license details	<ul style="list-style-type: none">◆ Name◆ Company Name◆ Product ID



See also

[Options settings](#)

[File types settings](#)

[FileSphere property settings](#)



Options

This **Main layout** section displays a list of available FileSphere spaces. A tick in the checkbox against a space indicates its icon is displayed. An empty checkbox indicates the icon is hidden. By default, all FileSphere spaces are displayed but you may, for example, not wish to display the **Favorites** icon if you do not use the **Favorites** space.

The **Advanced** section controls default settings for displaying ghost folders and unclassified documents; stopping automatic view by when 20 documents are reached; and various prompts that are displayed for classification and checking out actions.

[Navigation: FileSphere icon menu > Properties > General > Options]

To modify options settings

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **Options** tab.

Main layout settings

- ▶ Click on the checkbox adjacent to the appropriate space name.
- ▶ Click **OK** to close the **Properties** dialog box.

Advanced settings

This section allows you to set the following options by selecting or deselecting the appropriate checkbox.

Display ghost folders	<input type="checkbox"/> Default Unchecked: Ghost Folders are not displayed by default. When a New Folder is added it is displayed as a Ghost Folder, however, other Ghost Folders remain hidden. Regardless of this setting, Ghost Folder display can be toggled on and off , in individual folders, using the Ghost Folder button.
Display unclassified documents	<input checked="" type="checkbox"/> Default Checked: Unclassified documents are always displayed. Unchecked: documents that are not classified for the current view are not displayed. For example if you View By Subject , Subject View Folders only will be displayed and documents with no Subject will be hidden. Regardless of this setting, the display of unclassified documents can be toggled on and off in individual Folders using the Unclassified Documents button.  If you are looking in the Document Space and you cannot see any documents, you may have no View By property selected and unclassified documents hidden. Click the Unclassified Documents button to reveal your documents.
Display the full path in the Retrieval Bar	<input checked="" type="checkbox"/> Default Checked: Displays the full path of properties and values entered in the Retrieval Bar . E.g. Author=Jo Citizen/Subject=Sales/Title=Sales Forecast Unchecked: Once the retrieval path has been actioned, the bar displays only properties entered. E.g. Author/Subject/Title/
Display hints for items	<input checked="" type="checkbox"/> Default Checked: Displays hints for space, folder and document items when your mouse hovers over them. Hints displayed are specific to each Document Space and are defined using the Hints tab in the Document Space Properties dialog box. Unchecked: no hints are displayed.
Stop automatic view by when 20 documents reached	<input checked="" type="checkbox"/> Default Checked: When you use View By to create View Folders , FileSphere will not automatically generate further View Folders once a Folder contains 20 documents or less. Unchecked: FileSphere automatically generates further View Folders , using the sequence in which properties are displayed on the View By menu, until it reaches a property for which no documents have a value .
Prompt to return open documents	<input checked="" type="checkbox"/> Default Checked: When you close a document that you have opened from My Workspace , FileSphere will prompt you to return the document to its Document Space or keep it in My Workspace (i.e. Checked Out). Unchecked: No prompt is displayed and documents are automatically returned.
Prompt to checkout when sending documents	<input checked="" type="checkbox"/> Default Checked: When you Send a document to a Network Peer , FileSphere asks if you want to Check Out the document or to send a copy. Unchecked: No prompt is displayed when a document is sent to a Network Peer and the document is automatically Checked Out .
Prompt when identified emails are added	<input checked="" type="checkbox"/> Default Checked: When you received a packaged FileSphere file by email, you are prompted to add the document to your In Tray. Unchecked: No prompt is displayed and received documents are automatically added to your



	In Tray.
Prompt auto classify	<input checked="" type="checkbox"/> Default Checked: When you add a document to FileSphere it is automatically classified (i.e. the document's native metadata is transferred to FileSphere) and no prompt is displayed. Unchecked: When you add a document to FileSphere you are prompted to accept or decline the automatic classification.



See also

- [File types settings](#)
- [General properties](#)
- [FileSphere property settings](#)



File types

This section of FileSphere properties is used for file types for special handling, such as disable, prompt to open/run, manually manage versions or treat as a template.

Navigation: [FileSphere icon menu](#) > [Properties](#) > [General](#) > [File Types](#)

To view special file types settings

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **File Types** tab.
- ◀ In the **Special file types** section, file types that may be unsafe; require no version control; or are to be treated as templates are listed.
- ◀ The **Details for extension** section shows details for the extension highlighted in the **Special file types** list:

Manual version management	If the check box is ticked for a particular extension, this means that FileSphere will open a read only version of the file, which does not require version control. An MP3 file is an example of this type of file: when you open (or play) the file, a copy will be displayed in My Workspace but the file will not be checked out. When the file is closed, it will be automatically returned to the Document Space .
Open / Run	Allows you to Enable , Disable or Prompt to open/ run files with a particular extension
Template	Allows you to save files with a particular extension as templates, which means on opening, an editable copy of the file is opened which has to be saved as a new document, preserving the original document.

To add a new file extension to the special file types list

- ▶ Right click on the **FileSphere** icon, select **Properties** from the menu and then the **File Types** tab.
- ▶ Click the **New** button
- ◀ The **New Extension** dialog box is displayed
- ▶ Type the extension in the **Extension** box, without typing a preceding dot (.), and click **OK**.
- ◀ The new extension is added to the list. Its file type defaults from the system. If the file type is not recognised the file type will be displayed as "<extension> file type."
- ▶ Highlight the new file type in the list of **Special file types**
 - ▶ Check the **Manual version management** checkbox if you do not require version control for this type of file.
 - ▶ Select **Enable**, **Disable** or **Prompt** from the **Open / Run** drop down list to determine how the file is handled when opened
 - ▶ Check the **Template** checkbox if you wish to define this file type as a template.

Click the **OK** button to close the **Properties** dialog box.



See also

- [General properties](#)
- [Options settings](#)
- [FileSphere property settings](#)



Document Space properties

Document Space property settings are for viewing general properties and managing document types, file storage location and document hint settings. Property settings can be accessed from the right click menu of the **Document Space** icon (on the desktop, in the **Windows Explorer** view or in the **FileSphere Administration** console).

[Navigation: Document Space icon menu > **Properties**]

To access property settings

▶ Right click on the **Document Space** icon and select **Properties** from the menu.

◀ The **Properties** dialog box allows you to view or edit the following property settings by clicking on the appropriate tab :

General	Displays information about the Document Space , such as name of the computer on which it is located and the number and total size of files it holds.
Document Types	Allows you to specify which document extensions, associated document types and drivers are registered with FileSphere for the selected Document Space
File Storage	Allows you to change the storage location of documents held in the selected Document Space .
Hints	Allows you to specify which hints are displayed on mouseover of documents in the selected Document Space



How to

[View Document Space general properties](#)

[Edit Document Space document types settings](#)

[Edit Document Space file storage settings](#)

[Edit Document Space hints settings](#)



General properties

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **General** tab.

The following information is displayed:

	Displays Document Space for the main Document Space . For additional Document Spaces , displays the name entered when the Document Space was created.
Description	Displays a user defined short description
Location	Displays the system name for the computer you are working on followed by the Document Space name for additional Document Spaces
Contains	Displays the number of files contained in the Document Space
Total Size	Displays the total size of the files contained in the Document Space



See also

- [Editing document types settings](#)
- [Editing file storage settings](#)
- [Editing hints settings](#)
- [Viewing general properties](#)
- [Document Space properties](#)



Document types

Document Types settings hold details of the document types and their associated file extensions that are registered with **FileSphere**. Selecting an extension displays details of its associated driver.

You can register new document types, delete redundant document types and change the driver associated with a document type.

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **Document Types** tab.

To register a new document type

- ▶ Click the **Add** button.

The **Add New Document Type Association** dialog box is displayed.

- ▶ Enter a **File Extension** and select an **Associated Document Type** from the drop down list **or** you can type in a new one.
- ▶ Click **OK** to close the dialog box.
The new document type will be added to the list. If you selected an existing **Associated Document Type**, its default driver will be associated with the document type.

To change the driver associated with a document type

- ▶ Select the extension and click the **Change...** button.
The **Open** dialog box is displayed.
- ▶ Browse to select the appropriate driver, then click **Open**
- ▶ Click **OK** to close the dialog box.

To remove a document type

- ▶ Select the extension of the document type you wish to remove and click the **Remove** button.
- ▶ Click **OK** to close the dialog box.



See also

- [Editing file storage settings](#)
- [Editing hints settings](#)
- [Viewing general properties](#)
- [Document Space properties](#)



File storage

The **File Storage** tab displays the file system storage location of the documents held in this **Document Space**. This location is selected when FileSphere is installed but you can change it, if for example you are running out of space in that location.



This process could take a considerable amount of time, depending on how many documents you have in the **Document Space**. You will not be able to work with any FileSphere documents until the process is complete.

To change the document storage location

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **File Storage** tab.
- ▶ Click the **Move...** button.
- ▶ The **Browse for Folder** dialog box is displayed.
- ▶ Browse and select a new location **or** you can create a new folder.
- ▶ Click **OK** to close the dialog box.
- ▶ The documents contained in the **Document Space** will be moved to the new storage location
- ▶ Click **OK** to close the dialog box.

To restore the default storage location

- ▶ Clicking the **Restore Default** button to move the documents back to the default storage location, if you chose not to accept the default storage location when you installed FileSphere or if you have previously changed the document storage location.



As with changing the document storage location, this process could take a considerable amount of time, depending on how many documents you have in the **Document Space**. You will not be able to work with any FileSphere documents until the process is complete.

- ▶ Click **OK** to close the dialog box.



See also

- [Editing Document Space hints settings](#)
- [Viewing Document Space general properties](#)
- [Editing Document Space document types settings](#)
- [Document Space properties](#)



Hints

When you hover the mouse pointer over a document hint items are displayed in a popup box. The items displayed by default are **File name**, **document status** and **number of versions**. You can choose to display any FileSphere metadata items (classification) in the mouseover box by selecting them from the document management system attributes and business and application schemas displayed under the **Hints** tab.

To change hint items

- ▶ Right click on the **Document Space** icon, select **Properties** from the menu and then the **Hints** tab.
- ▶ To locate hint items for selection, expand the top level list of items by clicking the adjacent .
- ▶ Select items to display as hints, or remove from display, by selecting/ deselecting the appropriate checkbox.
- ▶ Click **OK** to close the dialog box.



See also

- [Viewing general properties](#)
- [Editing document types settings](#)
- [Document Space properties](#)
- [Editing file storage settings](#)



Classification

[About classification](#)

[About classification schemas](#)

[System schema](#)

[Application schemas](#)

[Business schemas](#)

[Common schema](#)



About classification

FileSphere classification is based on schemas that apply the rules for document classification and retrieval. There are four types of schema used: **System**, **Application**, **Business** and **Common** (internal, mapped).

A schema specifies the **properties** used for classification and the sequence in which those **properties** are displayed on the **View By menu** and in the **FileSphere Properties** dialog.

The following attributes are defined for each **property**:

Name	Name of the property	
Type	Possible values for Type are:	
	Text	General format for a property
	Number	Only numerical values can be assigned to the property
	Date/Time	For properties that have date or time values
	Yes/No	Property value can only be Yes or No
	True/False	Property value can only be True or False
	Memo	Allows a free text value to be assigned
	Auto Number	Property value is automatically assigned as a unique number, when the document is added to FileSphere and cannot be changed.
	Auto Year	Property value is automatically assigned as the current year, when the document is added to FileSphere and cannot be changed.
Mandatory	Yes or No (default) - if Yes is selected the user is expected to enter a value for this property when the document is added to FileSphere. If no value is entered, the document Type is prefixed with " Pending Classification -- " and its document name is italicised.	
Read Only	Yes or No (default) - indicates if the property value can be changed	
Column View	Yes (default) or No - indicates if the property can be displayed as a column in the Document Space	



No schema attributes can be changed for the **System** schema. **Type** and **Read Only** cannot be changed for **Application** schemas.

All schema management is performed in the **Classification** section of **FileSphere Administration**.



See also

[About classification schemas](#)

[System schema](#)

[Application schemas](#)

[Business schemas](#)

[Common schema](#)



About classification schemas



Classification

FileSphere is installed with four types of schema:

Navigation: [FileSphere icon menu](#) > [FileSphere Administration](#) > [My FileSphere](#) > [Document Space](#) > [Classification](#) >

	System	The System schema is determined by the operating system and cannot be changed. It includes file attributes such as size, date, filename, etc.
	Application	<p>Application schemas contain document attributes specific to the application associated with the document. For example, if you select Properties from the File menu of a Microsoft Word document, the properties displayed are determined by the Microsoft Word Document schema. These are some of the document related properties that are transferred with the document when it is added to FileSphere, thereby auto classifying it.</p> <p>Application schemas can be imported, created and deleted. Application schema properties can be renamed or added to/ removed from display on the View By menu.</p> <p>You can also change the sequence in which properties are displayed on the View By menu and in the FileSphere Properties dialog.</p> <p>FileSphere has built-in schemas for most commonly used applications:</p> <ul style="list-style-type: none"> ◆ Adobe Acrobat Document ◆ Compressed (zipped) Folder ◆ Image ◆ Microsoft Excel Worksheet ◆ Microsoft PowerPoint Presentation ◆ Microsoft Project Document ◆ Microsoft Visio Drawing ◆ Microsoft Word Document ◆ Microsoft Word Template ◆ Movie Clip ◆ MP3 audio file (mp3) ◆ Outlook Express Mail Message ◆ Outlook Item ◆ Rich Text Format ◆ Text Document ◆ WinRAR archive
	Common	The common schema is an internal schema that defines a common set of properties that are mapped to other application schema properties. In the default common schema the properties are mapped to the most commonly used application properties for each document type. Examples of application properties include subject, author, title, category, etc. Property mapping can be changed or you can add new properties to the common schema and then map them to other application properties.
	Business	FileSphere is installed with a pre-defined business practice schema that requires enabling if you wish to use it. You can customize this schemas to suit your organization's business classification objectives. You can change the order in which schema properties are displayed on the View By menu and in the document's FileSphere Properties dialog box



See also

- [System schema](#)
- [Application schemas](#)
- [Business schemas](#)
- [Common schema](#)
- [About Classification](#)



System schema



Each **Document Space** has one **System** schema, which is determined by the operating system and includes file attributes such as size, date, filename, etc.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > Classification > **System**]

To view System schema properties

▶ Select the **System** icon and then double click on the **File** schema in the contents pane or right click on the **File** schema and select **Properties** from the menu.

◀ The **File Properties** dialog displays the following items, which can only be modified, where indicated:

General Properties	
Name	File is the default schema name - can be modified
Description	a short description for the schema - can be modified
URN	Uniform resource name that identifies this resource
<input type="checkbox"/> Concatenate Schema name to Property names	Selecting this checkbox, concatenates the schema name to the property names when they are displayed on the View By menu and in this dialog box
Properties for this schema are listed. The following, which cannot be modified, is defined for each property:	
Name	(Disabled) - properties cannot be modified
Type	
Mandatory	
Read Only	
Column View	
Buttons	
Add	(Disabled) - properties cannot be added
Remove	(Disabled) - properties cannot be deleted
View By Order	(Disabled) - cannot change the order in which properties are displayed on the View By menu
Display Order	(Disabled) cannot change the order in which properties are displayed in the FileSphere Properties dialog
View XML	Click to display the schema in XML format. Click the Export button in the View XML dialog box to export and save the schema as an RDF file.
Tree View	Displays the schema data in a tree view.
Drop down list	
Status	(Disabled) Set to Enabled



See also

- [Application schemas](#)
- [Business schemas](#)
- [Common schema](#)
- [About Classification](#)
- [About classification schemas](#)



Application schemas



Application

FileSphere is installed with built-in application schemas for most commonly used applications. These are listed under **Application**, with the icon used to represent each schema being based on its related application. **Application** schemas cannot be added or deleted but you can [modify](#) properties.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > Classification > Application]

To view Application schema options

▶ Select the **Application** icon, then right click to display the menu.

◀ The following options are displayed:

New Application Schema	Allows you to: create a new schema: manually; load from a file or specify a URN
View	View as Large Icons, Small Icons, List, Details or Customize view
Refresh	Standard Windows Refresh
Export	Exports a list of the application schemas as a comma delimited (.csv) file
Help	Invokes FileSphere Administrator Help (this help system)

To modify properties

▶ Select the **Application** icon and then double click on the appropriate **application** schema in the contents pane or right click on the **application** schema and select **Properties** from the menu.

◀ The **File Properties** dialog displays the following items, which can only be modified, where indicated:

General Properties	
Name	File is the default schema name, which is usually the name of the application - can be modified
Description	a short description for the schema - can be modified
URN	Uniform resource name that identifies this resource
<input type="checkbox"/> Concatenate Schema name to Property names	Selecting this checkbox, concatenates the schema name to the property names when they are displayed on the View By menu and in this dialog box
Properties for this schema are listed. The following is defined for each property:	
Name	Name of the property - can be modified
Type	Possible values are: Text, Number, Date/Time, Yes/No, True/False, Memo (Disabled for built-in schemas)
Mandatory	Yes or No (default) - can be modified
Read Only	Yes or No (Disabled for built-in schemas)
Column View	Yes (default) or No - can be modified
Buttons	
Add	Click to add a new property (details as above)
Remove	Highlight a property in the list and click this button to remove the property from the schema. A message dialog warns that all associated property values (classification) will be removed also
View By Order	Click to display the Set View Order for Properties dialog where you can add or remove properties from the View By menu and change the order in which properties are displayed on the View By menu
Display Order	Click to display the Set Display Order for Properties dialog where you can change the order in which properties are displayed in the FileSphere Properties dialog



View XML	Click to display the schema in XML format.
Tree View	Displays the schema data in a tree view.
Drop down list	
Status	(Disabled) Set to Enabled



See also

- [Business schemas](#)
- [Common schema](#)
- [About Classification](#)
- [About classification schemas](#)
- [System schema](#)



Business schemas



FileSphere is installed with a standard business practise schemas designed for the general office, which requires enabling if they it is to be used. If the [properties](#) of the [common schema](#) do not fully meet the classification requirements of the organisation, then the [business schema](#) may be enabled. [Business schema properties](#) can be [added](#), [removed](#) and [modified](#). [Business schema](#) properties can also be mapped to the [common schema](#), if it is preferred to view all [properties](#) in a single schema.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > Classification > Business]

To view Business schema options

- ▶ Select the [Business](#) icon, then right click to display the menu.
- ◀ The following options are displayed:

New Business Schema	Allows you to: create a new schema: manually; load from a file or specify a URN
Set View By Order for Schemas	Displays the Set View Order for Schemas dialog where you can add or remove available business schemas from the View By menu and change the order in which schemas are displayed.  Also allows you to move the Common Schema to a different position in the view order.
Set Display Order for Schemas	Displays the Set Display Order for Schemas dialog where you can change the order in which schemas are displayed in the FileSphere Properties dialog
View	View as Large Icons, Small Icons, List, Details or Customize view
Refresh	Standard Windows Refresh
Export	Exports a list of the business schema details as a comma delimited (.csv) file
Help	Invokes FileSphere Administrator Help (this help system)

To modify properties

- ▶ Select the [Business](#) icon and then double click on the [business schema](#) that you wish to modify, in the contents pane or right click on the [business schema](#) and select [Properties](#) from the menu.
- ◀ The [File Properties](#) dialog displays the following items, which can only be modified, where indicated:

General Properties	
Name	File is the default schema name, which is usually the name of the application - can be modified
Description	A short description for the schema - can be modified
URN	Uniform resource name that identifies this resource
<input type="checkbox"/> Concatenate Schema name to Property names	Selecting this checkbox, concatenates the schema name to the property names when they are displayed on the View By menu and in this dialog box
Properties for this schema are listed with the following information:	
Name	Name of the property - can be modified
Type	Possible values for Type are:
	Text General format for a property
	Number Only numerical values can be assigned to the property
	Date/Time For properties that have date or time values
	Yes/No Property value can only be Yes or No



	True/False	<i>Property value</i> can only be True or False
	Memo	Allows a free text <i>value</i> to be assigned
	Auto Number	<i>Property value</i> is automatically assigned as a unique number, when the document is added to FileSphere and cannot be changed.
	Auto Year	<i>Property value</i> is automatically assigned as the current year, when the document is added to FileSphere and cannot be changed.
Mandatory	Yes or No (default) - if Yes is selected the user is expected to enter a <i>value</i> for this <i>property</i> when the document is added to FileSphere. If no value is entered, the document <i>Type</i> is prefixed with " Pending Classification -- " and its document name is italicised.	
Read Only	Yes or No (default) - indicates if the property value can be changed	
Column View	Yes (default) or No - indicates if the property can be displayed as a column in the Document Space	
Buttons		
Add	Click to add a new <i>property</i> (details as above)	
Remove	Highlight a property in the list and click this button to remove the property from the schema. A message dialog warns that all associated property values (classification) will be removed also	
View By Order	Click to display the Set View Order for Properties dialog where you can add or remove <i>properties</i> from the View By menu and change the order in which <i>properties</i> are displayed on the View By menu	
Display Order	Click to display the Set Display Order for Properties dialog where you can change the order in which <i>properties</i> are displayed in the FileSphere Properties dialog	
View XML	Click to display the schema in XML format.	
Tree View	Displays the schema data in a tree view.	
Drop down list		
Status	Select Enabled or Disabled . When a schema is disabled, its <i>properties</i> are not displayed on the View By menu or in the FileSphere Properties dialog. Schema status can also be changed by right clicking on the schema icon and selecting Enable or Disable from the menu.	

**How to**[Map common schema properties](#)**See also**

[Common schema](#)
[About Classification](#)
[About classification schemas](#)
[System schema](#)
[Application schemas](#)



Common schema



Common



Schema

FileSphere has one **common schema**, which is an internal schema used to map like **properties** from multiple **application schemas** to one common **property**. The **common schema** is the only schema enabled when FileSphere is installed. If the **properties** of the **common schema** do not fully meet the classification requirements of the organisation, one or more **business schemas** may be enabled. The **common** schema cannot be deleted and a new one cannot be created. **Common** schema **properties** can be [added](#), [removed](#) and [modified](#), all changes made affect the selected **Document Space** only.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > Classification > Common]

To view/ modify properties

▶ Select the **Common** icon and then double click on the common **Schema** in the contents pane or right click on the common **Schema** and select **Properties** from the menu.

◀ The **File Properties** dialog displays the following items, which can be modified, where indicated:

General Properties	
Name	Common is the default schema name - can be modified
Description	A short description for the schema - can be modified
URN	Uniform resource name that identifies this resource
<input type="checkbox"/> Concatenate Schema name to Property names	Selecting this checkbox, concatenates the schema name to the property names when they are displayed on the View By menu and in this dialog box
Properties for this schema are listed. The default common properties are Category, Subject, Author, Keywords, Title, Comments . The following is defined for each property:	
Name	Name of the property - can be modified
Type	Possible values for Type are:
	Text General format for a property
	Number Only numerical values can be assigned to the property
	Date/Time For properties that have date or time values
	Yes/No Property value can only be Yes or No
	True/False Property value can only be True or False
	Memo Allows a free text value to be assigned
	Auto Number Property value is automatically assigned as a unique number, when the document is added to FileSphere and cannot be changed.
	Auto Year Property value is automatically assigned as the current year, when the document is added to FileSphere and cannot be changed.
Mandatory	Yes or No (default) - if Yes is selected the user is expected to enter a value for this property when the document is added to FileSphere. If no value is entered, the document Type is prefixed with " Pending Classification -- " and its document name is italicised.
Read Only	Yes or No (default) - indicates if the property value can be changed
Column View	Yes (default) or No - indicates if the property can be displayed as a column in the Document Space
Buttons	
Add	Click to add a new property (details as above)
Remove	Highlight a property in the list and click this button to remove the property from the schema. A message dialog warns that all associated propertyvalues (classification) will be removed also
View By Order	Click to display the Set View Order for Properties dialog where you can add or remove properties from



	the View By menu and change the order in which properties are displayed on the View By menu
Display Order	Click to display the Set Display Order for Properties dialog where you can change the order in which properties are displayed in the FileSphere Properties dialog
View XML	Click to display the schema in XML format.
Tree View	Displays the schema data in a tree view.
Drop down list	
Status	Select Enabled or Disabled . When a schema is disabled, its properties are not displayed on the View By menu or in the FileSphere Properties dialog. Schema status can also be changed by right clicking on the schema icon and selecting Enable or Disable from the menu.

**How to**

[Map common schema properties](#)

**See also**

[About Classification](#)
[About classification schemas](#)
[System schema](#)
[Application schemas](#)
[Business schemas](#)

Mapping common properties

**Common****Mapping**

A **property** defined in an **application schema** or a **business schema** can be mapped to a **common property** or removed from a **common property** mapping. Before mapping a **property** you must make sure that the **common property** to which it is to be mapped is already defined in the common schema. All **common property** mapping affects the selected **Document Space** only.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > Classification > Common]

To map common properties

- ▶ Select the **Common** icon and then double click on the **Mapping** icon in the contents pane or right click on the **Mapping** icon and select **Properties** from the menu.
- ◀ The **Set Common Properties for Schemas** dialog is displayed
- ◀ The left side contains a drop down list of **Available Schemas**. When a schema is selected from the drop down list, a list of **properties** that are defined by that schema is displayed. The **Common** column indicates where a **property** is mapped to a **common property**.
- ◀ The right side contains a drop down list of **Common Properties**. When a **common property** is selected from the drop down list, a list of **properties** that are mapped to it is displayed. The **Schema** column indicates, in which schema the mapped **property** is defined.
- ◀ Where a selected **Available Schema** has a **property** that is mapped to the selected **Common Property**, the mapped **properties** are **highlighted**.
- ▶ Select a **property** from the **Common Properties** list
- ▶ Select a **schema** from the **Available Schemas** list, highlight the **property** you want to map and click the **>>** button
- ◀ The **property/** schema is displayed in the list of **common properties** for the selected **Common Property**

To remove common property mapping

- ▶ Select the **Common** icon and then double click on the **Mapping** icon in the contents pane or right click on the **Mapping** icon and select **Properties** from the menu.
- ◀ The **Set Common Properties for Schemas** dialog is displayed (see [above](#) for further information)
- ▶ Select the **schema** from which you want to remove mapping, in the **Available Schemas** list
- ▶ Highlight the mapped **property** and click the **Remove** button
- ◀ The selected **property's** mapping will be removed



or

- ▶ Select a **common property** from the **Common Properties** list
- ▶ Highlight the **property** from which you want to remove mapping, in the list below and click the **Remove** button
- ◀ The selected **property's** mapping will be removed



See also

- [About Classification](#)
- [About classification schemas](#)
- [System schema](#)
- [Application schemas](#)
- [Business schemas](#)
- [Common schema](#)



Administrative tools & tasks

[FileSphere Administration console](#)

[Restarting FileSphere](#)

[Document Recovery](#)

[Modifying and repairing FileSphere](#)

[Upgrading FileSphere](#)

[Uninstalling FileSphere](#)



FileSphere Administration console

FileSphere Administration is displayed in a Microsoft Management Console (MMC) window. It allows you to manage security; auditing & monitoring logs; classification schemas; services & settings; and deleted documents and versions; for the selected local **Document Space**:

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > **Document Space**]



[Classification](#)



[System](#)



[Application](#)



[Business](#)



[Common](#)



[Versions](#)



See also

[Restarting FileSphere](#)

[Document Recovery](#)

[Modifying and repairing FileSphere](#)

[Upgrading FileSphere](#)

[Uninstalling FileSphere](#)



Managing deleted versions



Versions

Selected document versions can be deleted using the **Remove** option either from the document's **Versions** menu or its property settings under the **Versions** tab. Deleted versions are transferred to the **Versions** folder, under the corresponding **Document Space**, in the **FileSphere Administration** console. You can selectively **restore** or **delete** versions from here. Before restoring or deleting versions, you can export a list of documents, which shows: document **Name**, **Type**, **Size** and last **Modified** date.

[Navigation: FileSphere icon menu > FileSphere Administration > My FileSphere > Document Space > **Versions**]

To display details of deleted document versions

- ▶ Select the **Versions** icon to display the list of documents from which versions have been deleted.
- ▶ Right click on a document in the right contents pane to display the **Properties Versions** dialog box which lists the deleted versions.
- ▶ If there is a large number of deleted versions, you can select to view just **Minor** or **Major** versions using the drop down list.
- ▶ You can select and restore or delete individual versions

To restore versions

- ▶ Select the **Versions** icon to display the list of documents from which versions have been deleted.

To restore individual versions

- ▶ Select the document you want to restore versions for, then right click and select **Properties** from the menu.
- ◀ The **Properties Versions** dialog box is displayed.
- ▶ If there is a large number of deleted versions, you can select to view just **Minor** or **Major** versions using the drop down list.
- ▶ Highlight a version (use the ctrl or shift keys to select multiple versions) and click the **Restore** button.

or to restore all versions for selected documents

- ▶ Select the document(s) you want to restore versions for in the right contents pane, then right click and select **Restore** from the menu.

or to restore all versions for all documents

- ▶ Right click on the **Versions** icon and select **Restore All** from the menu.

To delete versions

To delete individual versions

- ▶ Select the document you want to delete versions for, then right click and select **Properties** from the menu.
- ◀ The **Properties Versions** dialog box is displayed.
- ▶ If there is a large number of deleted versions, you can select to view just **Minor** or **Major** versions using the drop down list.
- ▶ Highlight a version (use the ctrl or shift keys to select multiple versions) and click the **Delete** button.

or to delete all versions for selected documents

- ▶ Select the document(s) you want to delete versions for in the right contents pane, then right click and select **Delete** from the menu.

or to delete all versions for all documents

- ▶ Right click on the **Versions** icon and select **Delete All** from the menu.

To export a list of documents

- ▶ Select the **Versions** icon to display the list of documents from which versions have been deleted.
- ▶ Right click on the **Versions** icon, then right click and select **Export List...** from the menu.
- ▶ Select a location and enter a **File Name** in the **Save As** dialog box.
- ▶ Click **Save** to create a .txt file of document details of the deleted versions.



See also

- [Document Recovery](#)
- [Modifying and repairing FileSphere](#)
- [Upgrading FileSphere](#)
- [Uninstalling FileSphere](#)



[FileSphere Administration console](#)
[Restarting FileSphere](#)



Restarting FileSphere

For configuration changes to take effect or if you are experiencing any problems running FileSphere, you need to restart your FileSphere application.

[Navigation: FileSphere icon menu > **Restart**]

To restart FileSphere

- ▶ Right click on the **FileSphere** icon and select **Restart** from the FileSphere icon's menu.
- ◀ All **FileSphere** folders will be closed and **FileSphere** will be restarted.



See also

- [Document Recovery](#)
- [Modifying and repairing FileSphere](#)
- [Upgrading FileSphere](#)
- [FileSphere Administration console](#)
- [Uninstalling FileSphere](#)
- [Managing deleted versions](#)



Document recovery



Documents and/ or schemas can be [recovered](#) by running the **Document Recovery Wizard**. Document recovery copies documents/ schemas from their FileSphere storage location to a specified location on your computer. You can choose to place documents in folders according to their application Type or in folders according to your default FileSphere view. You can only recover documents/ schemas when FileSphere is installed. If you have uninstalled FileSphere but chosen to keep your documents for recovering later, you will need to reinstall FileSphere before recovering them.

[Navigation: Windows Start menu > FileSphere Enterprise > **Document Recovery Wizard**]

To recover documents

- ▶ Click **Windows Start** then **Programs**, point to **FileSphere Enterprise** and click **Document Recovery Wizard**.

Follow the wizard steps to recover your documents:

Welcome screen

- ▶ Click **Next >** to continue

Select FileSphere Documents

- ▶ Select the appropriate checkbox to recover documents from **Document Space**; **Shredder**; **My Workspace**; **In Tray**; or to recover **Schemas**.

If you select **Document Space** or **Shredder** you can [filter the documents recovered by name or date](#):

- ▶ Click the **Advanced** button to display the **Advanced Options** dialog box

To filter by document name:

- ▶ Enter a document name or you can use wildcard keys to recover documents of a specific type, e.g. *.doc or *.pdf

To filter by date:

- ▶ Click the Date checkbox and select Modified, Created or Accessed from the drop down list.
- ▶ Click a radio button to filter a specified date range or dates during the previous specified number of months or specified days.
- ▶ Click **OK** to continue

Select Recovery Destination

- ▶ Enter a **Destination**. You can use the **Browse** button to find and select the location to copy the documents to.
- ▶ Click **Next >** to continue

Select Recovery Destination Folder Hierarchy

- ▶ Click the appropriate radio button to create folders based on **File Type** or **Default FileSphere View**.
- ▶ Click **Next >** to continue

Start Recovery

- ▶ Review the recovery settings
- ▶ Click **< Back** go back and change the settings or **Recover** to start the recovery

Recovery Complete

- ◀ Once the recovery is complete, details are displayed including **Elapsed Time**, **Total Recovered Documents**, **Total Recovered Schemas** and the **Location** to which they were recovered.
- ▶ Click **<Close** to exit

To recover documents when FileSphere is not installed

You can recover documents providing you chose to **keep documents for recovering later** when FileSphere was uninstalled.

- ▶ Firstly, reinstall FileSphere
- ◀ During FileSphere installation, a message will be displayed: **Recoverable documents from the previous installation have been detected. Do you want to recover them?**
- ▶ Select **Yes**.
- ▶ When the installation is complete, [recover](#) the documents, as described above, by running the **Document Recovery Wizard** from the **Windows Start** menu.



See also

[Modifying and repairing FileSphere](#)
[Upgrading FileSphere](#)



[Uninstalling FileSphere](#)
[FileSphere Administration console](#)
[Restarting FileSphere](#)



Modifying and repairing FileSphere

Once FileSphere is installed on your computer, you can rerun the installation program to [modify](#), [repair](#) or [remove FileSphere](#).

[Navigation: FileSphere Installation package > [Setup.exe](#)]



Ensure all desktop applications are closed before you begin the maintenance program.

Modify – allows you to change which program features and Add-ins are installed

Repair – fixes missing or corrupt files, shortcuts and registry errors

Remove – removes FileSphere from your computer (you can choose to remove FileSphere but keep your documents and recover them later, using the Document Recovery Wizard)

Insert the FileSphere Enterprise installation CD into your computer's CD-ROM drive

Your computer will automatically launch the **Program Maintenance Wizard**.

- ▶ Select **Run** from the Windows **Start** menu
- ▶ Enter drive:\ setup.exe (Replace drive with the letter assigned to your CD-ROM drive).
- ▶ Click the **OK** button
- ▶ Follow the wizard steps :

Program maintenance

- ▶ Choose to [Modify](#), [Repair](#) or [Remove FileSphere](#) by selecting the appropriate radio button
- ▶ Click **Next >** to continue

Modify

Add/ Remove Components

Add Ins are modules for applications that can be integrated with FileSphere. FileSphere integrates with Microsoft Outlook, Word, PowerPoint and Excel.

- ▶ Choose which FileSphere Add Ins you want to install or remove:
- ▶ Select or deselect the appropriate check boxes
- ▶ Click **Next >** to continue

Ready to modify the program

Add Ins are modules for applications that can be integrated with FileSphere. FileSphere integrates with Microsoft Outlook, Word, PowerPoint and Excel.

- ▶ Choose which FileSphere Add Ins you want to install or remove:
- ▶ Select or deselect the appropriate check boxes
- ▶ Click **Install** to continue

Install Complete

- ▶ Click **Close** to exit

Repair

Ready to repair the program

Repair reinstalls FileSphere, fixing any missing or corrupt files, shortcuts and registry errors.

- ▶ Click **Install** to continue

Install Complete

- ▶ Click **Close** to exit
- ▶ When Repair is complete, you will need to restart your computer

Remove

Remove the program

FileSphere will be uninstalled from your computer. You will be asked if you want to keep your FileSphere documents, for recovering later, or delete them.

- ▶ Click **Remove** to continue

Keep documents for recovery

- ▶ Select the **Yes** radio button, to keep your documents, or **No** to delete them
- ▶ Click **Next >** to continue

Remove Complete

- ▶ Click **Close** to exit



See also

- [Upgrading FileSphere](#)
- [Uninstalling FileSphere](#)
- [FileSphere Administration console](#)
- [Restarting FileSphere](#)
- [Document Recovery](#)



Upgrading FileSphere

FileSphere upgrades are supplied as a standard FileSphere installation package, which can be used for a fresh installation or to upgrade an existing installation.

Release notes (Release.txt) accompanying the installation files indicate any special requirements for the new version and any enhancements or bug fixes since the previous version.

The latest Information on FileSphere upgrades is also available from www.filesphere.com

[Navigation: FileSphere Installation package > **Setup.exe**]



See also

[Uninstalling FileSphere](#)

[FileSphere Administration console](#)

[Restarting FileSphere](#)

[Document Recovery](#)

[Modifying and repairing FileSphere](#)



Uninstalling FileSphere

FileSphere can be removed by using:



Add/Remove Programs in the Control Panel

or



Uninstall FileSphere from Windows Start menu Programs > FileSphere Enterprise

or



By running **Setup.exe**, if you chose to keep the installation files when you first installed FileSphere

You will be asked during the uninstallation if you wish to **keep your FileSphere documents to recover later?**

- ▶ Select **Yes** to keep your documents, or **No** to delete them.
- ▶ If you reinstall FileSphere, you will be informed that **Recoverable documents from the previous installation have been detected.** and asked, **Do you want to recover them?**
- ▶ Select **Yes**, if you chose to keep documents when FileSphere was uninstalled.



Ensure all desktop applications are closed before you begin to uninstall FileSphere



See also

- [FileSphere Administration console](#)
- [Restarting FileSphere](#)
- [Document Recovery](#)
- [Modifying and repairing FileSphere](#)
- [Upgrading FileSphere](#)



Technical support

[Contacting FileSphere](#)



Contacting FileSphere

General enquiries

email: info@filesphere.com

Product feedback

email: feedback@filesphere.com

Sales and Distributor enquiries

email: sales@filesphere.com

Technical enquiries

email: techsupport@filesphere.com

Before contacting the FileSphere Team, please refer to FileSphere Help and the FileSphere website, www.filesphere.com, for the latest information on FileSphere.



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[FileSphere end user license agreement](#)



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