



Using DocuShare document routing to update a Word document

Criteria First, Inc.

The purpose of this outline is to show how to submit a Word document to a document routing task so that others can contribute to changing its content. This is a basic overview and not intended to include all issues that might be encountered, such as changing permissions to content or using the DocuShare Windows Client.

Select a document in your browser and click on the blue triangle icon  and then the Routing  Route option.

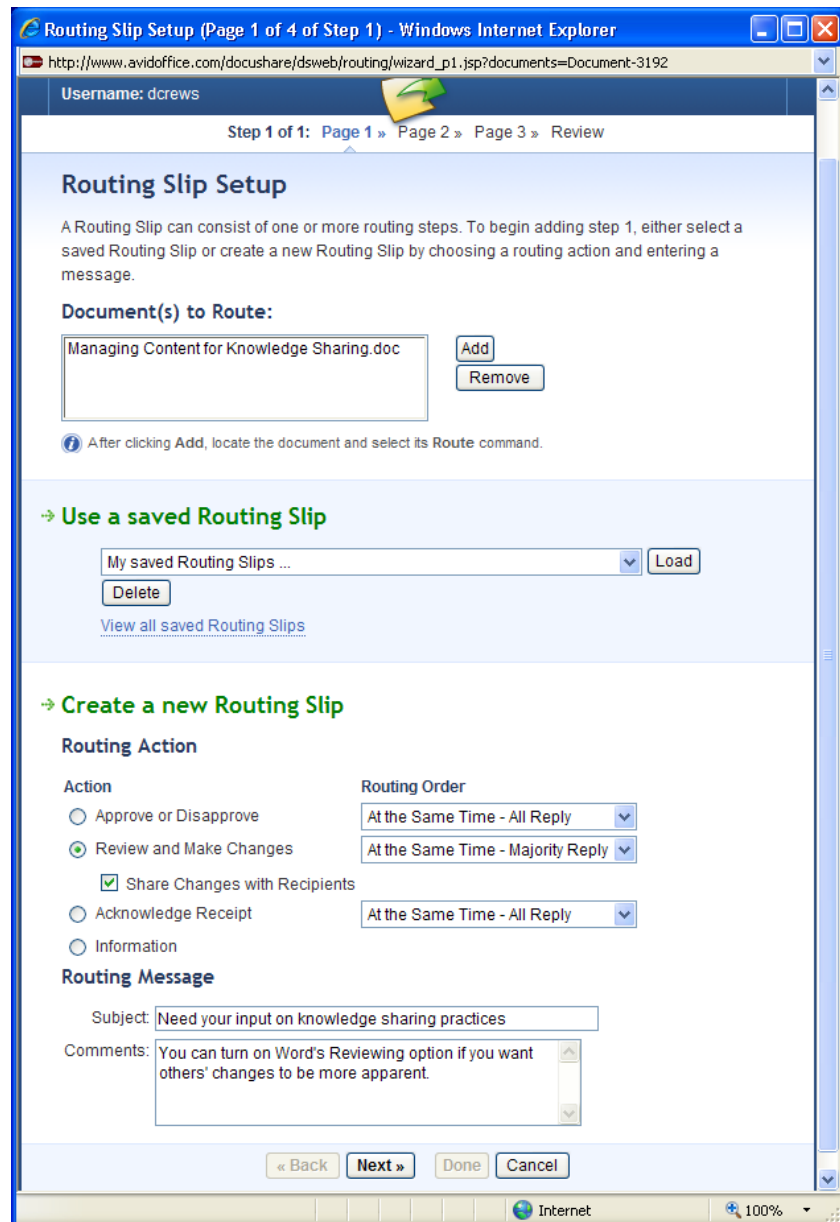
The DocuShare routing slip appears. Select the option under Routing Action for "Review and Make Changes" along with the appropriate Routing Order option for your needs. If you want each person's contributions to be independent of the others', leave the "Share Changes with Recipients" checkbox unchecked. If you want each person to see another's changes, check the box.

Select **Next** and add the users and/or groups to route the document to. We'll send our document to Bob and John.

Select **Next** to set your Escalation and Notification preferences. Then select **Done**.

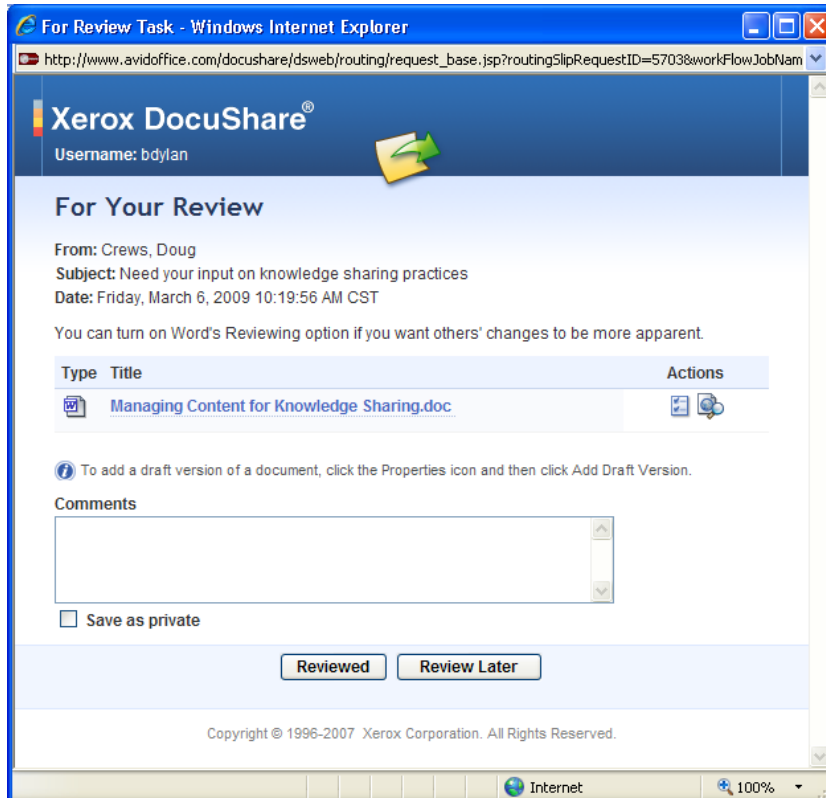
Review your settings, make changes or add additional steps, and then click **Submit**.

Either defer to one of the users or login as him/her to check their My Tasks for Tasks Assigned to Me. Click on the assigned task to view the For Your Review window. Here the user can click on the document's icon or title and view the document within Word or within Word embedded with the browser, based on your Explorer setting for ".doc" types of documents. You can also click on the icons to the right to view its properties or view an html rendition of the document. To contribute changes, click on the Word icon or title to open the document. You may note that the title bar of the open Word document indicates it's in read-only mode. Make your changes and choose File > DocuShare > Save as new version.



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It will take you to your default folder on your PC, probably your My Documents folder. Click the "up one level" folder icon to your Desktop and look for the My DocuShare Places icon. If it's not there, then open My Computer and look for My DocuShare Places. The location of this icon is determined at the time the DocuShare Windows Client is installed.

Open My DocuShare Places and navigate to the collection where this document is stored and double-click on the document. It will ask you if you want to create a new version of the selected file and show its filename. Click Yes. You may have to click OK if you see a message indicating the file is read-only. The DocuShare Check-in Wizard appears. Enter a comment about your changes for the version history and check the box for Express check-in, then click on the **Finish** button. Your Word document is still open, so now you can close it. It's checked in. You can verify this in DocuShare by looking at the Version History within the document's properties.

Make your comment and click **Reviewed** to finish.

Done with Bob, on to John. Logoff and log back in as John or ask him to check his My Tasks link in DocuShare. John will go through the same operations and will be able to see the changes made by Bob. Once he's done making his additions and changes, he checks in the document, makes his comment, and clicks the **Reviewed** button.

The originator of the document routing task can check his My Tasks link to see an update on their progress and click on the specific task and then the link to the document to see their comments and the latest version of the document.

Practice routing documents and updating them using the Routing Action for "Review and Make Changes" to get a feel for this. You should then be comfortable using document routing in production mode for your group.