# DocuShare 7's new Content Rules Manager
With a little help from your friends at Criteria First

Content Rules step you through a set of dialogs allowing you to establish workflows essential to good business process management (BPM).  Content Rules are included in DocuShare Enterprise and available as an add-on to DocuShare Standard.  DocuShare 7 helps you manage content rules more easily by providing you with a new centralized Content Rules Manager feature.  All content rules throughout your DocuShare server can be accessed by logging in as a DocuShare site administrator.  Content administrators don't have access to this new resource.  If you've created a rule for Collection C that you'd also like to use in Collection D, just copy the rule to the new collection.  You should see this new feature on your classic DocuShare homepage once logged in as a site administrator.

## OTHER LINKS
Links to other content

**My DocuShare**
Your personalized DocuShare home page

**Content Rules Management**

**WorkCentre Scan Repository**
Temporary storage for scanned documents

**Lifecycle Manager Policies**

**Mail Bypass**

**QuickSearch view**

**Self-Register**
Create a login for this DocuShare server!

Clicking on Content Rules Management presents a listing of all the rules on your site.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Approval required for invoice under $2500** (Subscription-499) | C(Collection-1088) | Something added | This container and all levels of contents | dcrews | | ... |
| **Approval with annotations required for invoice $2500 and over** (Subscription-500) | C(Collection-1088) | Something added | This container and all levels of contents | dcrews | | ... |
| **Approved** (Subscription-501) | C(Collection-1088) | Properties edited | This container and all levels of contents | dcrews | | ... |
| **Approved by CFO** (Subscription-502) | C(Collection-1088) | Properties edited | This container and all levels of contents | dcrews | | ... |
| **Approved without authorization** (Subscription-504) Signing off on an invoice whose amount is greater than their authorization allows. | C(Collection-1088) | Properties edited | This container and all levels of contents | dcrews | | ... |
| **Disapproved** (Subscription-505) | C(Collection-1088) | Properties edited | This container and all levels of contents | dcrews | | ... |

Clicking on the title of the rule or selecting properties from the ellipsis icon ( ⋯ ) allows you to view and edit the rule.

## ⚙ Approval required for invoice under $2500

| View |
| Edit |
| Permissions |
| Change History |

### View Properties

**Content Rule Description:**

Title: Approval required for invoice under $2500
Summary:
Description:

**Event Triggers:**

**When:**

- Something added

**Where the content involved is:**

- Invoice

**Where the content rule scope is:**

- This container and all levels of contents

**Where the content property conditions apply:**

- None

**Where the date property conditions apply:**

- None

**Where the numeric property conditions apply:**

- Invoice Amount is less than 2500
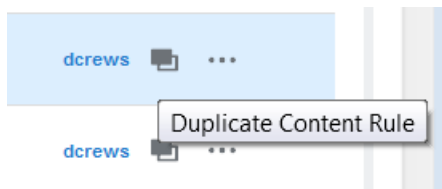
**Action Performed:**

Change properties

**Action Settings:**

Properties:
Summary: Approval required

To duplicate a rule for use in another collection, click on the overlapping rectangles.



dcrews 🗗 •••

Duplicate Content Rule

dcrews 🗗 •••

You'll then see an interface which allows you to search for the collection(s) you want to copy it to.  In this example I'm copying it to the main Vendors collection.  This is great for testing a new rule in a development collection and then copying it to the production collection.

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Location: Home \ C \ Approval required for invoice under $2500 Duplicate

### Duplicate Content Rule: Approval required for invoice under $2500 (Subscription-499)

Choose additional **Collections** to which this content rule can be duplicated.

Sort By:  [ Title  ▲▼ ]  [ GO ]

Filter:  [                    ]  [ GO ]

[ SHOW ALL ]

Possible Objects:
```
Contracts with Vendors and Suppliers (Collection-24592)
Vendors (Collection-24588)
Vendors - filing by Purchase Order # (Collection-21145)
```

[ ADD ↓ ]   [ REMOVE ↑ ]

Selected Objects:
```
Vendors (Collection-868)
```

[ DUPLICATE CONTENT RULE ]

### Vendors                                                                ...
FlexiCapture and DAVupDoc automatically file documents here. So does DocuPage Pro.
This area contains revisable, scanned, and redirected print documents.

| | |
|---|---|
| View | **Content Rules** |
| Edit | Set up and view content rules |
| Add Menu Objects | |
| Permissions | ⚙ Create a New Content Rule |
| **Content Rules** | |
| Notifications | **Title**          **Owner  Actions** |
| Locations | Approval required for invoice under $2500    dcrews  ▣  ... |
| Scan Cover Sheet | Copy all incoming invoices to Invoices Under Review  dcrews  ▣  ... |
| Change History | |

A new handle of Subscription-629 is assigned to the copy of Subscription-499.  That's so you're not sharing the rule with the original collection which could cause problems in Collection C if you want to make a change to the rule in Collection D.  It can now be edited to change its name or specific functionality for the Vendors collection.  Deleting it doesn't affect the original content rule.  If you're using content rules, I think you'll appreciate the new capabilities this offers to making implementation easier.

If you'd like more guidance on this or other DocuShare features and functionality, please call us at 972-492-4428 or write to us at support@criteriafirst.com