



DOQEX® Project Spaces

Guide for Project Managers and Users

Version	Date	Author	Change Description
0.1	17/08/2015	Neil McCutcheon	Initial document creation
0.2	02/03/2015	Neil McCutcheon	Update for release codebase
0.3	17/08/2015	Nick Case	Pre-Release Document
1.0	28/02/2016	Nick Case	Updated for customer release

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DOCUMENT PURPOSE

This guide is for DOQEX® users who are members of or managers of Project Spaces.

We assume a basic familiarity with the use of DOQEX®.

If you are an administrator and wish to setup or configure Project Spaces then you need to read the Project Space Release Pack documentation.

WHAT ARE PROJECT SPACES?

A Project Space is a discrete area within DOQEX[®] which is shared between members of a project.

Each Project Space has a defined lifetime, its own storage quota, file and share expiry settings. These settings can be different to those you have elsewhere within DOQEX[®].

Any DOQEX[®] user can be a member of a project space. A project owner is assigned and they are responsible for user management. They can add any user from their DOQEX[®] company into the project space, specify end dates for membership and assign them as a project managers.

Each Project Space has its own audit trail which is available for project managers to inspect.

Q. WHO'S WHO IN PROJECT SPACES?

A. There are different types of users in Project Spaces. Exactly who they are and what they can do varies according to your company configuration and the range of Project Space features in use.

By default there are three types of Project Space users:

1. **Members.** Ordinary users who have access to all files and folders within the project space. What you can do with files can be restricted by Project Managers.
2. **Project Managers** have access to the Project Admin page. They can edit settings, add, delete and promote members.
3. **Project Owner.** The Project Owner has the same rights as a Project Manager. The owner always has access to the project (even if they are removed as a member!). The Project Owner has responsibility for appointing initial members and manager(s) and for receiving Project data when the project expires and enters its retirement period.

DOQEX[®] and your company administrators control more detailed project space parameters including the creation of Projects Spaces, allocating Project Owners and what happens to project data when a project expires and enters retirement.

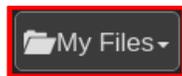
Q. HOW DO I ACCESS A PROJECT SPACE?

A. If you are a member of a Project Space your "**My Files**" button changes.

The button is now a selection button, indicated by a downward chevron.

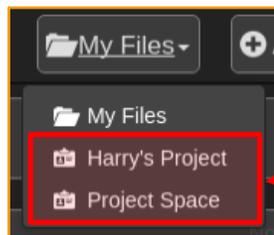
To access a project space:

1. Click "**My Files**" to show a list of the project spaces you are a member of.



Click to view your project spaces

2. Select the Project Space from the list.



Select a project space from the list to move into that project space.

3. You are now in the Project Space.

To switch back to your own space or another project space:



To return to your own space, click the selection button and select "**My Files**" from the list.

You can also switch to any other Project Space you are a member of.

Q. HOW DO I WORK IN A PROJECT SPACE?

A. In the same way as the rest of DOQEX[®]!

- There are files, folders, a home and pending folder.
- You have the ability to share files and folders.
- You can request files from other people that will be uploaded to the project space.

By default, every member of a Project Space can view the Project Space files page, move files between folders and download and share every folder and file within the project space. It is a shared space for project members.

There is therefore no longer any need to share folders or files with other members of the project; access to files and folders is explicit by virtue of project membership.

Q. WHAT'S DIFFERENT IN A PROJECT SPACE?

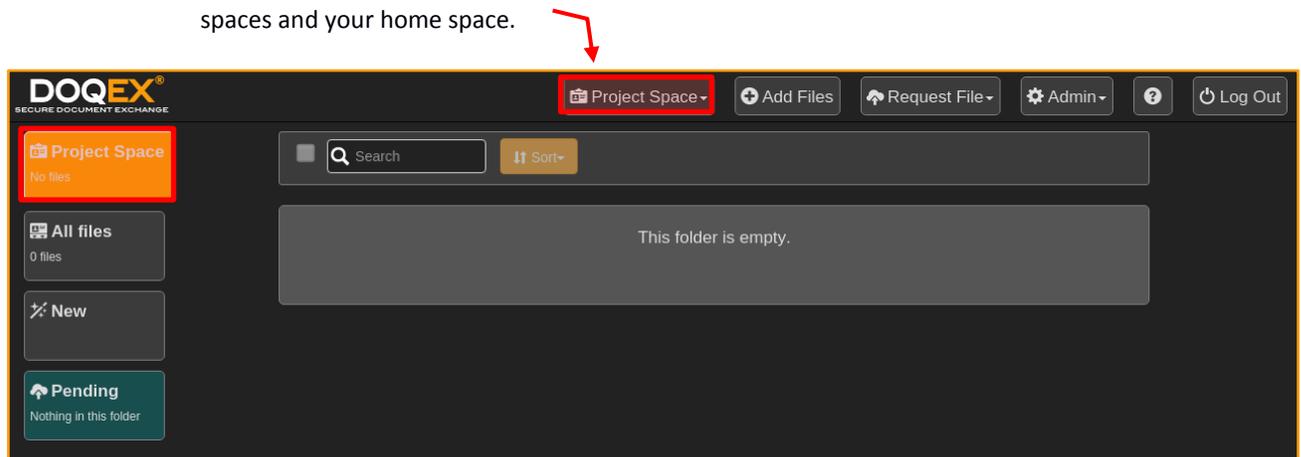
A. Project Owners and Managers can restrict the things you can do with files.

- The sharing of files and folders to non-project members is controlled by the project owner and any project managers.
- The project owner (and any project managers) can also restrict an ordinary project member's ability to edit file and share expiry dates and folder names.

There are also some changes to the user interface:

- The home folder name is now that of the project space.
- The folders and files on view are now only those files and folders that are part of the project.
- Every member of the Project Space can see **all** the files and folders within it.

Switch between project spaces and your home space.



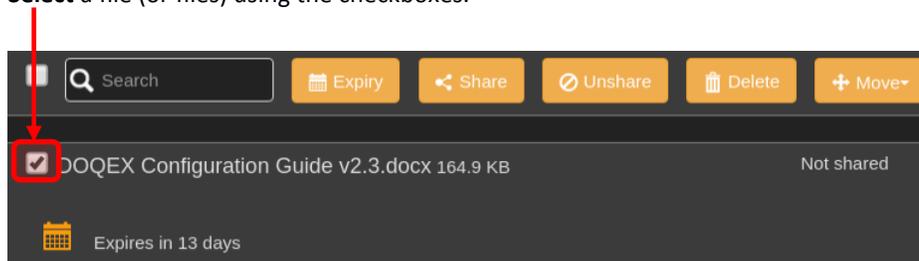
Q. HOW DO I ADD FILES TO PROJECT SPACES?

A. As a Project Space member you have several options for adding files to it:

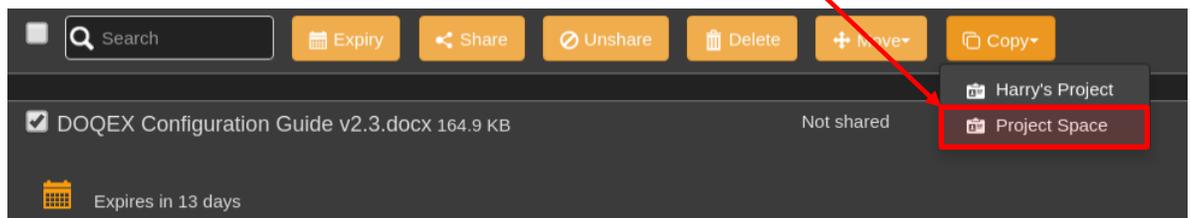
1. Uploading files directly to a folder in the project space. Use the “**Add Files**” button.
2. Issuing upload links to other people. Use the “**Request File**” button.
3. Copying files to the project space from your home space using the “**Copy**” button.

The ‘**Copy**’ button option is only used for Project Spaces, to use the copy function:

1. **Note:** You must be in your home space, it is not possible to copy files to or from a project when inside a project space.
2. **Select** a file (or files) using the checkboxes.



3. This reveals the “**Copy**” button on the toolbar.
4. Click the Copy button and select the Project Space to copy the files to.



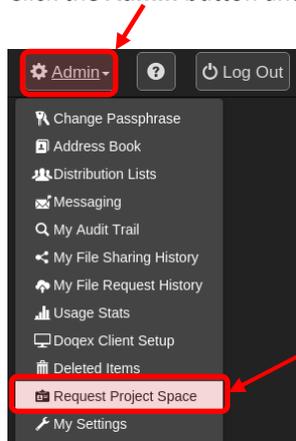
5. The files will be copied across to the selected project space.

NOTE: Copied files are distinct versions of the original file, i.e. if the file in your home space is deleted (or expires) the version in the Project Space is unaffected. The same applies to shares.

Q. HOW DO I REQUEST A PROJECT SPACE?

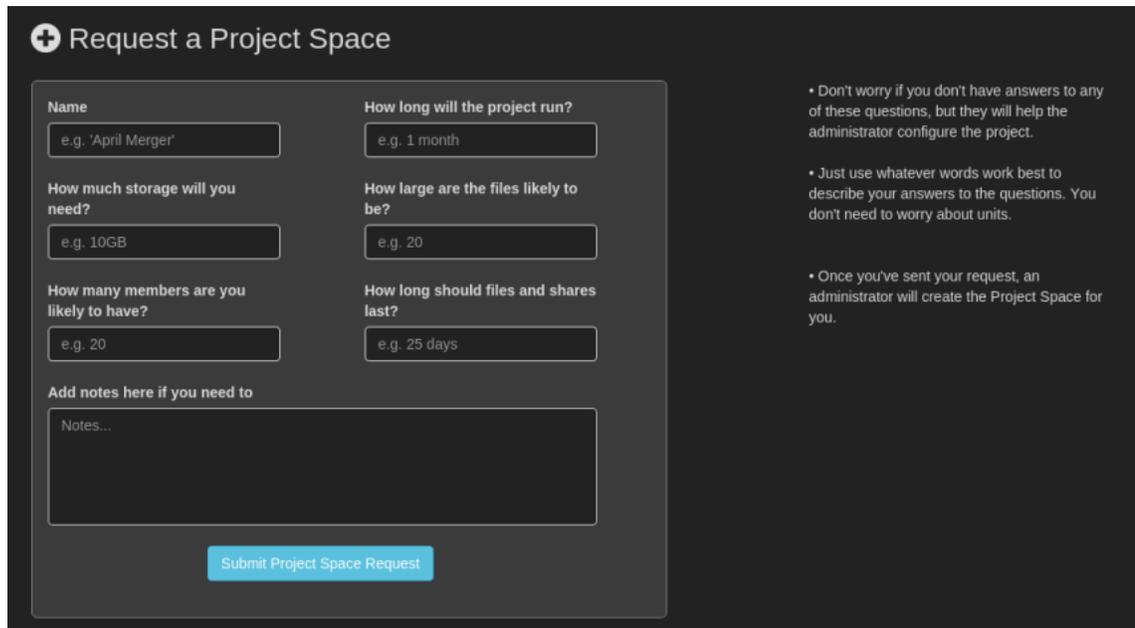
A. Use the “Request Project Space” option from the **Admin** menu button.

1. **Note:** Administrators must have enabled Project Space Requests for your company.
2. Click the **Admin** button and select “Request Project Space” from the menu



Select this menu option to go to the Request Project Space page.

3. Complete the form with details of the project. Don't worry if you don't have all the details or are unsure about units; provide as much information as you can.

A screenshot of the 'Request a Project Space' form. The form has a title '+ Request a Project Space'. It contains several input fields: 'Name' (e.g. 'April Merger'), 'How long will the project run?' (e.g. '1 month'), 'How much storage will you need?' (e.g. '10GB'), 'How large are the files likely to be?' (e.g. '20'), 'How many members are you likely to have?' (e.g. '20'), and 'How long should files and shares last?' (e.g. '25 days'). There is a 'Notes...' field and a 'Submit Project Space Request' button. On the right side, there are three bullet points: 'Don't worry if you don't have answers to any of these questions, but they will help the administrator configure the project.', 'Just use whatever words work best to describe your answers to the questions. You don't need to worry about units.', and 'Once you've sent your request, an administrator will create the Project Space for you.'

4. When submitted, notification is sent to administrators who will then configure the Project Space for you. You will be sent email notification of the result of your request.
5. Once a request is granted, you should go the **Project Admin** pages (see next section).

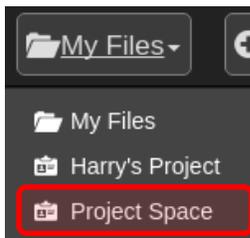
PROJECT OWNERS AND MANAGERS

At creation, every project is allocated a Project Owner. The project owner will be emailed when a project has been created and allocated to them.

The project owner is responsible for maintaining the project members and has capability to amend a range of project parameters. This includes the ability to promote or demote project members as Project Managers.

Project managers are unable to edit settings which affect the overall storage or lifetime of the project space.

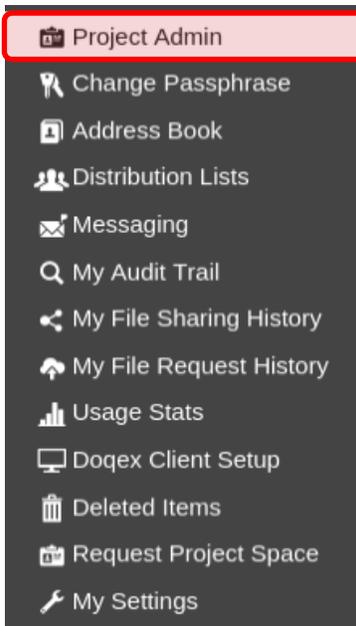
Once created, the project owner will find a new option under his “My Files” button:



New Project available under
“My Files” button dropdown.

Selecting the Project Space from the list of available projects will move the user into the Project Space.

The Project Owner (and any Project Managers) will have a new option available to them under the Admin menu.



Project Owners and Project
Managers now see this option under
their Admin menu.

Note: The Project Owner can only be changed by an administrator.

The Project Owner may add as many project members as they require, any of which may be granted manager rights to the project space. All project managers will see the Project Admin menu option when they are in the Project Space.

MANAGING PROJECTS

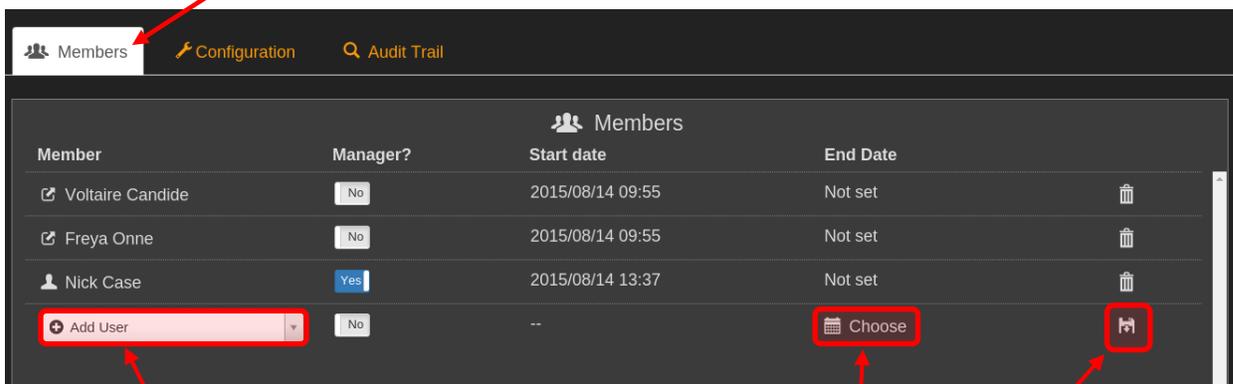
Project Owners and Managers access Project Admin pages via the link in their Admin menu.

Note: You must be in the Project Space for the Admin menu option to appear!

MANAGING PROJECT MEMBERS

The first task for a Project Owner is to add members to the project.

1. Select the **Members** tab



To add a new project member:

1. Select them from the dropdown list.
2. Select an end date (optional)
3. Finally, click the save icon.

Project Members may be selected from the dropdown list. Only users within your division are eligible for project membership. If you require members from other divisions an administrator must add them.

Project Space members can have an end date set. When a member reaches their end date, a configurable grace period allows the members to continue to access existing files but not add or change any files.

Any project member may be promoted to Project Manager by selecting the Manager check-box next to their username. The project member will now see the Project Admin option under their Admin menu button. Project Managers have the same capability as the project owner in terms of managing project users, project settings and viewing the project log.

Project members are removed by clicking the icon.

PROJECT CONFIGURATION

As a Project Owner or Manager you have permission to modify a wide range of project settings.

Please be careful editing settings – help text is available – move your mouse over the **i** icon.

You cannot however change project end-dates, storage quotas, max file size or max expiry. These settings remain under the control of administrators.

To edit project configuration:

1. Select the Configuration tab on the Project Admin page.
2. This page allows you to edit:
 - The Project Name
 - Overlay and Header messages
 - Email originator address and name
 - Project email notification list
 - Limit external shares to a 'whitelist' of domains

The screenshot shows the 'Configuration' tab of the Project Admin page. It features several sections for editing project settings:

- Project Space Name:** A text input field containing 'Project Space Demo' with an information icon.
- Overlay and Header messages:** Two buttons labeled 'Overlay' and 'Header'.
- Send mails from this address:** A text input field containing 'projectname@yourcompany.com' with an information icon.
- Send mails as this name:** A text input field containing 'Project Title' with an information icon.
- Who should receive email notifications from this Project Space?:** A text input field containing 'projectmanager@yourcompany.com, someoneelse@yourcompany.com' with an information icon.
- Limit who can receive external shares to these email domains:** A text input field containing 'othercompany.com, partner.co.uk' with an information icon.
- Advanced Project Space Settings:** A link with a red box and a red arrow pointing to it, indicating further configuration options.

3. There are more settings available under **Advanced Project Space Settings**

4. The Advanced screen allows editing of:

- Where the project space name appears
- Default and Max Share Expiry (up to the Max Share Expiry set by administrator)
- Default and Max File Expiry (up to the Max File Expiry set by administrator)
- Enable/disable email notifications for:
 - a. Uploads
 - b. Downloads
- Enable/disable shares:
 - a. Out of the project, i.e. to other users who are not project members
 - b. Public shares, i.e. to anyone (see domain restrictions setting above)

↑ Hide Advanced Project Space Settings ↑

Where should the Project Space name be shown? ⓘ

As "Home" folder text

Share Expiry ⓘ

Default 4

Max 5

File Expiry ⓘ

Default 4

Max 180

Notifications

Uploads ⓘ No

Downloads ⓘ No

Allowed Shares

Out-Of-Project ⓘ Yes

Public ⓘ Yes

AUDIT TRAIL

All Project Space activities are logged. An overview of the log is available for Project Managers to search and view.

Access the [Audit Trail](#) via the tab on the **Project Admin** page.

Project Log	
Q Search	
14 August 2015 at 14:09	New Project Space request by Nick Case: Request for project with name:
14 August 2015 at 13:37	Project Space member added by Nick Case: New Project Space member added: Nick Case
14 August 2015 at 09:58	Public share created by Harry Gone: File DigSig.api was shared with nbesant@panoplia.co.uk until 2015-08-18 10:09:00, with 2 download(s) allowed
14 August 2015 at 09:55	Project Space member added by Harry Gone: New Project Space member added: Freya Onne
14 August 2015 at 09:55	Project Space member added by Harry Gone: New Project Space member added: Voltaire Candide
14 August 2015 at 09:55	Private folder share created by Harry Gone: Folder "blah" shared with Chloe Reen, expires 2015-08-18 10:06:00
14 August 2015 at 09:54	New project file uploaded by Harry Gone: File: DVA.api System reference: PO5N4UVTH5URAYSF26HFY0BGWDQ8PDB1 File type: application/octet-stream Expiry: 2015-08-18