



GCdocs16



GCdocs16 Smart View Interface

Quick Reference Guide

Version 1.03



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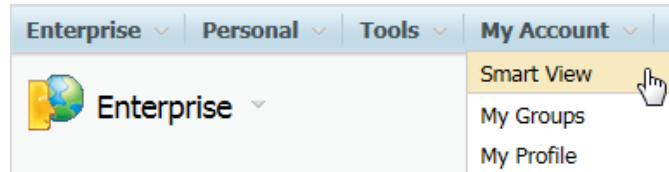


Launching GCdocs

1. To open the GCdocs sign-in page, type the web address or URL provided by your organization in the address bar of your web browser and press Enter.
2. If prompted, enter your username and password and select **Sign In**

GCdocs is comprised of two user interfaces. The Classic View and the Smart View. By default, you may be presented with the Classic View user interface.

To navigate from the Classic View to the Smart View interface, select **My Account** and then **Smart View**.



Once in the Smart View, click **Home**  to view the Landing page.

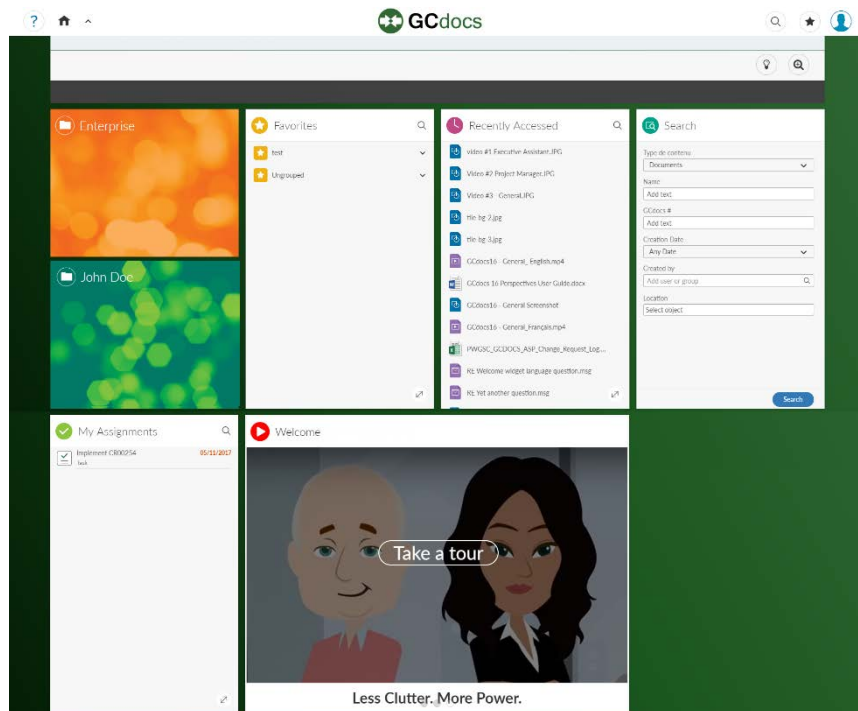
The Smart View interface

Navigating GCdocs Smart View






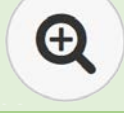






The landing page provides quick access to several areas used to navigate GCdocs.

Landing page

Tiles provide access to various areas and actions, including the **Enterprise** workspace, your **Personal** workspace, your **Favorites** page, your **Recently Accessed** documents, a **Search** function and your **My Assignments** page.













Icon definitions

Help		provides access to the Open Text online help
Search		displays the search bar and allows you to perform a simple search
Favorites		allows you to view your list of favourite items from anywhere in the Smart View
Profile menu		provides access to your personal profile and allows you to switch to the Classic View or to sign out
Hints and Tips		provides access to helpful hints and tips on using GCdocs
Advanced Search		provides access to the advanced search feature
Home		brings you back to the Landing page from anywhere in the Smart View
Filter		in the Enterprise or Personal workspace, allows you to find content using filters, such as the application type, size or document owner
Add Item		allows you to add items, such as folders, documents, etc.
Show description		click to view the description field of an item
Comment		click to comment on an item or to view comments
Add/Remove Favorite		click to add or remove an item as a favourite

Inline Action Bar



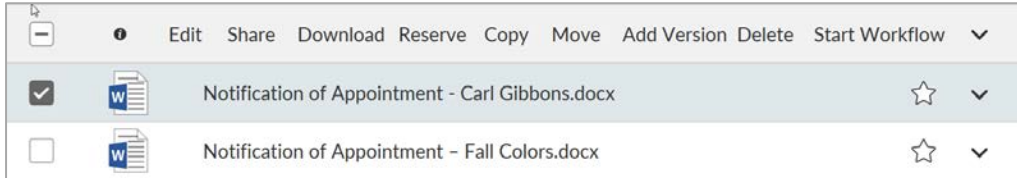
Provides basic actions for manipulating items, such as documents. Quick links to **Properties**, **Rename**, **Edit**, **Share** and more actions commonly used are easily accessible.

Properties		displays Description, Created, Created by, Modified, Owned by, Type
Rename		allows you to edit the name of an item
Edit		allows you to edit a document and create a new version
Share		allows you to send a link to an item by email
More actions		provides access to other basic actions such as download, reserve, add version, etc.
Download		allows you to download a document and save it outside of GCdocs
Reserve		allows you to reserve an item and remove editing rights
Copy		allows you to copy an item to another location
Move		allows you to move an item to another location
Delete		allows you to delete an item from GCdocs



The actions available for items are context sensitive. Depending on the type of item and your level of permissions for it, the **Inline Action Bar** or the **More Actions** menu may display many or a limited number of actions that can be performed. The same is true when using the **Multi-select box**, selecting one item versus many items will modify your **Action Bar** menu.


You can also perform basic actions using the **Action Bar** by selecting the item's check box.



Items and documents

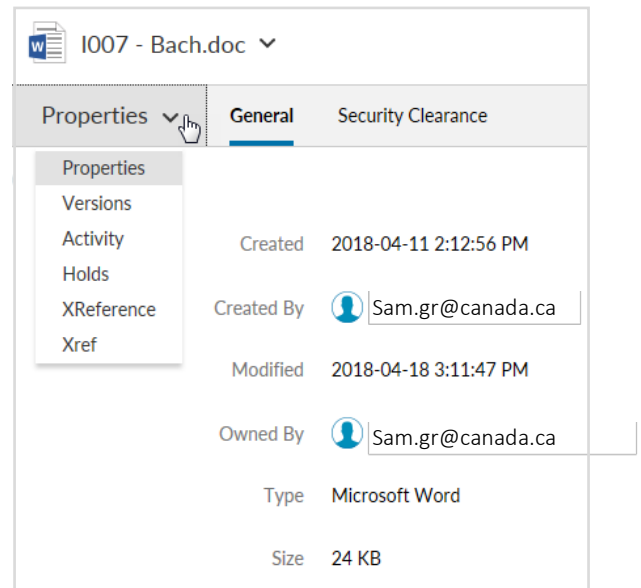
Viewing item properties

To view an item's metadata, select the

Properties icon  from the **Inline Action Bar**.

The **General** section under **Properties** includes basic information (metadata) such as date created, created by, modified, owned by, type and size.

The **Description** field is also displayed on this page. You can navigate the **Properties** menu to view **Versions** (that is, all the versions of a document), **Activity**, **Holds**, etc.



Accessing and editing documents

To access content, you can browse the Enterprise or Personal workspaces, navigate using the Favorites or Recently Accessed tiles or perform a search. You can also refine the list of items displayed in a folder by using filters. Once you find the document you are looking for, you can open the document with read-only access, download it or edit it.




Read-only access or downloading a document

To open a document with read-only access, click on the **document name**. This will launch a pop-up with options to either open the document or download and save the document outside of GCdocs.




Editing a document

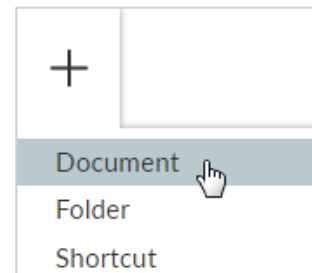
To edit a document, hover over the line item and click **Edit**  from the **Inline Action Bar**. This will open the document in its native application and allow you to make changes and save a new version.



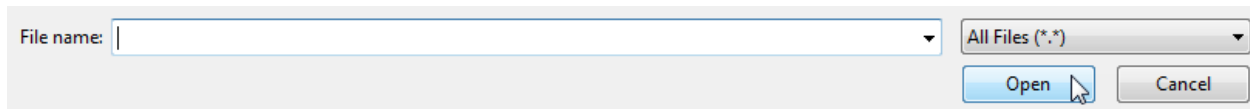
Important! A user must have Modify and Reserve permissions to be able to modify a document. Otherwise, the edit option will not be available in the Inline Action Bar.

Adding existing documents

Navigate to the folder where the documents will be added and select **Add Item**  and then **Document**.




Browse to locate the documents you want to import to GCdocs, select them and then click **Open**.

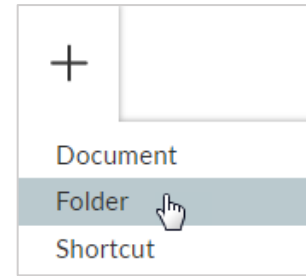


Success! A pop-up banner will appear to indicate documents were successfully uploaded.

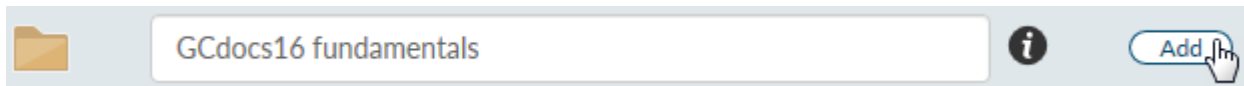



Adding folders

Navigate to the location where the folder will be created and select **Add Item**  and then **Folder**.



Name your folder and select **Add**.

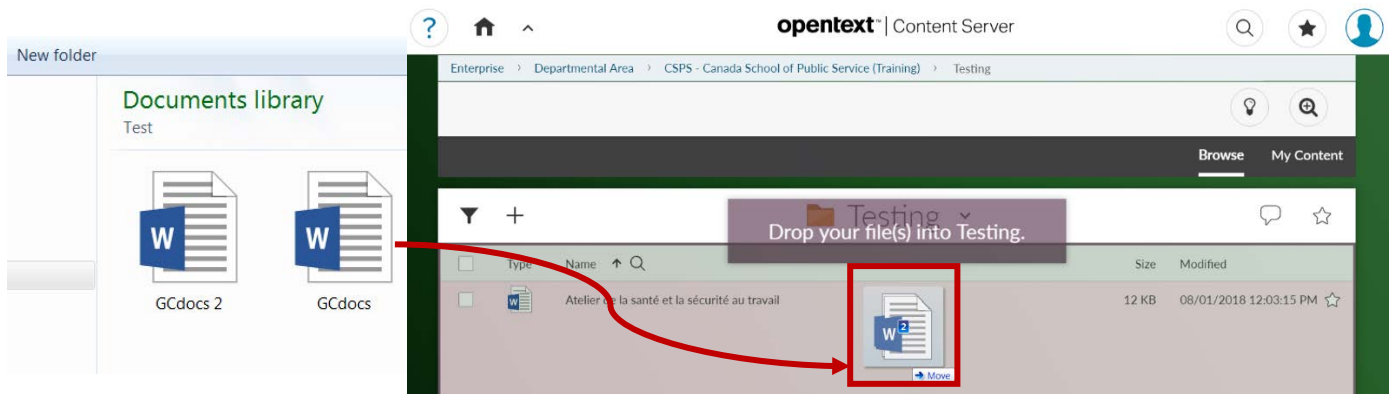


The **Add Item**  function lets you create other items such as shortcuts, web address links and wiki pages.

Adding existing documents using the Drag and Drop Method

Using your web browser, navigate to the folder where the documents will be added.


1. Minimize the GCdocs web browser window or make it smaller, and then, using Windows Explorer, navigate to the location where the documents are located.
2. Select the document(s) and drag them into the browse area of a folder in GCdocs.




Renaming an item



To rename an item, such as a document, hover over the line item and click


Rename  from the **Inline Action Bar**.

Rename your item and press enter. Pressing **Esc** or clicking on  will cancel your renaming action.

Sharing an item

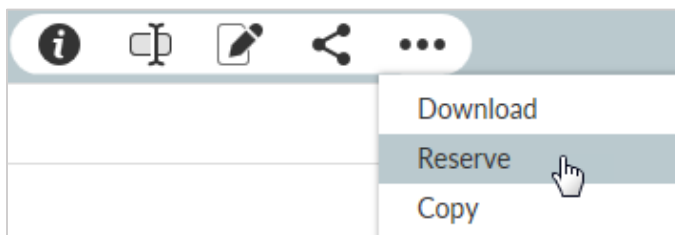



To share a **link** to an item by email, such as a link to a document, hover over the line item and click **Share**  from the **Inline Action Bar**. Your default email application (for example, Outlook) will launch with a new email that contains a link to the item in the body of the email.

Reserving a document

The **Reserve** action allows you to lock a document. This prevents others from modifying it.

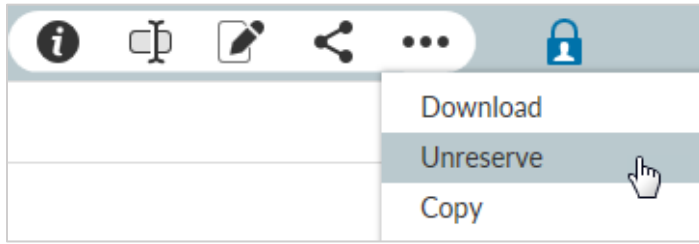
1. From the **More actions** menu of the document's **Inline Action Bar**, select **Reserve**.




2. Your document is now reserved and is identified with the reserved icon .



- To unreserve your document, from the **More actions** menu, select **Unreserve**.




If you hover your mouse over the **reserved** icon  , a bubble will indicate who has the document reserved. Clicking on this same icon will unreserve the document (if you have it reserved).



Did you know? A document is automatically reserved when you open it for editing.



Working in Favorites

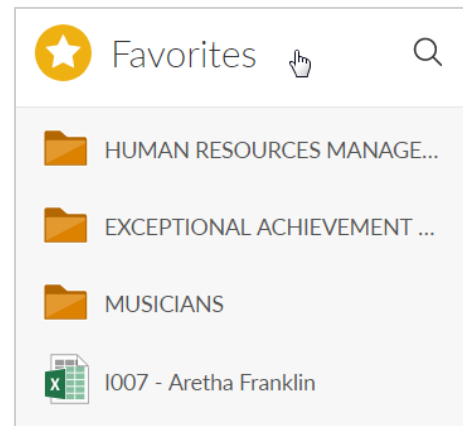
Accessing your “Favorites”

The **Landing page**  includes a **“Favorites”** tile to allow you to quickly access documents, folders or other items that you added as a favourite.




Clicking on **“Favorites”** takes you to your expanded Favorites page. From this view, you have access to your favourite items and the **Inline Action Bar**.

You can also click on the arrows to expand  or close  the tile.








★ Favorites			
+ Add group	<input type="checkbox"/>	Type	Favorite name <input type="text"/>
Ungrouped	<input type="checkbox"/>		HUMAN RESOURCES MANAGEMENT SERVICES
	<input type="checkbox"/>		EXCEPTIONAL ACHIEVEMENT AWARD
	<input type="checkbox"/>		MUSICIANS
	<input checked="" type="checkbox"/>		I007 - Aretha Franklin
	<input type="checkbox"/>		I007 - Elvis Presley

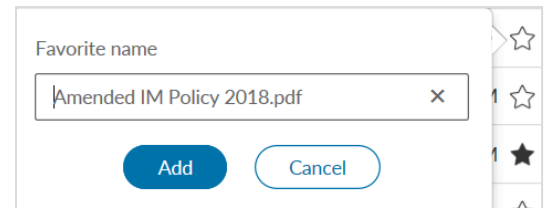
You can search your Favorites by clicking on the **Search** icon  or select multiple items to share them.



You can access your **Favorites**  on the top right corner from anywhere in Smart View.


Adding items as "Favorites"

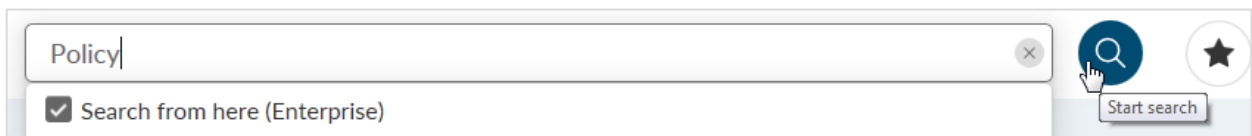
To add an item to your **Favorites list**, click on the white star  to **Add Favorite**. You can rename your Favorite if you choose. This will not rename the item. Select **Add**. Your star has now turned black . The item will now appear in your Favorites list, which can be accessed from the **Landing page** .



Searching

To perform a simple search, you have two options:

1. Click **Search**  on the top right of your screen. Type your search terms in the Search bar and press Enter (or click "Start search").






or


- Use the **Search** tile from the **Landing page**  . This option provides other fields to help refine your search.



Note: For a “Documents” search, the **Search** bar (option 1 above) will search in the document’s name and content. The **Search** tile (option 2 right) will only search in the document’s Name field.

On the **Landing page**  , you can click on the

Advanced Search icon  to access more advanced search options. Note that this will switch you over to the Classic View interface.

 Search | Recherche

Item Type d'élément

Name

GCDocs #

Creation Date de création

Modified Date modifié

Created By / Créé par

Location

Interpreting Search Results

Once you have performed your search, you will see the **Search Results** page. Note that only the items that you have the permission to see will appear in your search results.

Features in the search results page include:

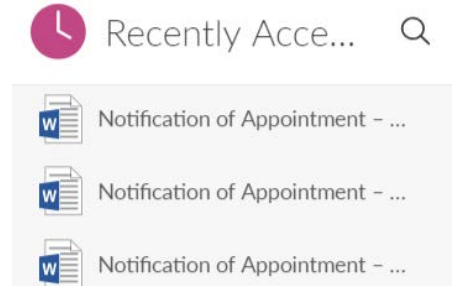
- Relevance** keyword searches will locate the key word in both the document's name and content and sort by relevance by default.
- Sort by menu** allows you to sort your search by creation date, category, date, size, etc.
- Inline Action Bar** allows you to perform actions, such as Edit, Share, Download, Reserve, etc.
- Filter menu** allows you to apply filters to your search results





Recently Accessed

The **Recently Accessed** tile allows you to see documents that you have recently viewed or modified.


Clicking on "**Recently Accessed**" takes you to your expanded **Recently Accessed** page. From this view, you have access to the **Inline Action Bar** for each document.



You can also click on the arrows to expand  or close  the tile.

Type	Name	Location	Last Accessed	Size	Modified
	Notification of Appointment - Winter White.docx	STAFFING ACTIO...	10/09/2018 11:24:22 AM	12 KB	05/09/2018 1:36:40 AM
	Notification of Appointment - Summer Fun.docx	STAFFING ACTIO...	10/09/2018 11:24:21 AM	12 KB	05/09/2018 1:36:38 AM
	Notificatio...	STAFFING ACTIO...	10/09/2018 11:24:20 AM	12 KB	05/09/2018 1:36:39 AM



Note: You can search your Recently Accessed documents by clicking on the **Search** icon  or select multiple documents to share them.

Permissions

Managing permissions

The **Permissions Manager** action lets you view user permissions granted on an item. If you have been granted authorization, you may be able to modify permissions of an item.

Type	Name	Location	Last Accessed	Size	Modified
	I007 - Aretha Franklin.xls				
	I007 - Bach.doc				
	I007 - Beethoven.doc				
	I007 - Black Eyed Peas.xls				
	I007 - Bob Dylan.xls				
	I007 - Bob Marley.doc				

- Download
- Reserve
- Copy
- Move
- Add Version
- Delete
- Start Workflow
- Permissions Manager



Viewing permissions

Expand the **More actions** menu from the item's **Inline Action Bar** and select **Permissions Manager**.

The **Permissions Manager** page will open. You can view the current permissions for an item.

Permissions Overview for: 1007 - Aretha Franklin.xls

Show columns: None

Name	User/Group	See	See Contents	Modify	Edit Attributes	Add Items	Reserve	Delete Versions	Delete	Edit Permissions	Actions
1007 - Aretha Franklin.xls	brigitte.ethier@canada.ca	✓	✓	✓	✓		✓	✓	✓	✓	Edit Permissions
	zzz-Partner-Administrators (11)	✓	✓	✓	✓		✓	✓	✓	✓	
	Public Access										
	CSPS - Canada School of Public Service (13)	✓	✓	✓	✓		✓	✓	✓	✓	
	DEPARTMENT (26)	✓	✓	✓	✓						
	brigitte.ethier@canada.ca	✓	✓	✓			✓				

Done

You can modify the permissions by selecting **Edit Permissions**. Make modifications to the users or groups and select **Update** to save your changes.



User/Group	See	See Contents	Modify	Edit Attributes	Reserve	Delete Versions	Delete	Edit Permissions
Default Access								
brigitte.ethier@canada.ca		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
zzz-Partner-Administrators (11)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public Access		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assigned Access								
CSPS - Canada School of Public Service (13)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEPARTMENT (26)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
brigitte.ethier@canada.ca		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Reset Close

If you do not see **"Edit Permissions"**, it is because you do not have the rights to modify the permissions for the item.



Granting access to a user or group

1. To grant access to a user or group, in the **Assigned Access** frame, select the **Grant Access** icon .
2. Find the user or group .
3. Assign the appropriate permissions and select **Update**. The permissions have now been updated.

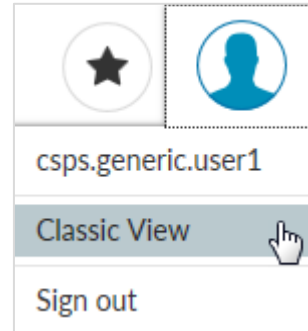


Navigating between the Smart View and Classic View interfaces

Smart View to Classic View

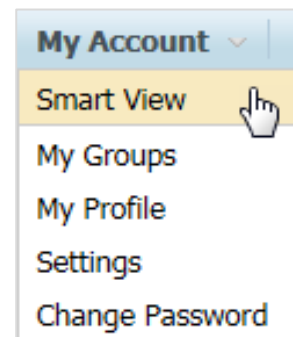
To navigate from the Smart View to the Classic View,

select your **Profile menu**  and **Classic View**. This will bring you directly to the Classic View from the page you were on in the Smart View.



Classic View to Smart View

To navigate from the Classic View to the Smart View, select: **My Account** and **Smart View**.



Note: Not all functions are currently available in the **Smart View**. If you notice that the option to switch to the **Smart View** is not available under **My Account** from a particular page while you are in the **Classic View**, it is because that function is not available from the **Smart View**. For example, the **Advanced Search** function is only available in the **Classic View**.

Not seeing the option to switch to the **Smart View** from the page you are on? Try navigating to the folder and document view and then switching to the **Smart View**.