

Volume

2



University of Wisconsin – Madison

Xythos Client User Manual

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Introduction

You can use the Xythos Drive to connect, or map, a network drive to a folder on a WebDAV server, effectively turning the Internet into a secure, shared virtual hard drive. The Xythos network drive behaves exactly like a Windows network drive, except that it uses HTTP and WebDAV* protocols. This permits any Windows program to open and edit documents stored on a web server as easily as if they were on your computer.

This manual provides help on the various features available within the Xythos Drive.

The Quick Start chapters 3-9 provide step-by-step instructions on commonly used features.

The Personalizing chapters 10-16 help you to fine tune Xythos Drive to meet your needs in working with My Webspace. These chapters describe the features and options in detail. The pages are arranged to correspond to the tabs in the user interface to make it easy to find what you are looking for.

We hope that you find the answers to your questions within these pages. If you care to leave us feedback and suggestions for how we can improve these pages, please send it to mywebspace-admin@lists.wisc.edu.

*WebDAV stands for "Web-based Distributed Authoring and Versioning". It is a set of extensions to the Hypertext Transfer Protocol (HTTP) standard. HTTP is the set of rules for reading and viewing text, graphic images, sound, video, and other multimedia files over the Internet. WebDAV adds rules for creating, changing, and moving documents, provide functionality to build web-based file storage that can be accessed from anywhere.

WebDAV also adds features that make possible collaborative editing and file management between users located remotely from each other on the Internet, including:

- Edit a document
- Add and remove people from the list of collaborators
- Grant read, write or sharing permissions for each user
- Lock the document to protect your changes from being overwritten
- Check-out, check-in, and retrieve previous versions

With WebDAV, a dispersed team connected by the Internet can safely and securely work together.

Terms of Service (Appropriate Use Guidelines)

We are excited to be able to offer you this service, and hope that you will find it beneficial for you in your studies and employment. As you log in for the first time, we want you to be aware of some of the rules of the road for usage. In addition to the terms for computer usage that you agreed to when you activated your NetID, there are some additional rules specific to usage within My WebSpace.

By logging in and using My WebSpace, you are agreeing to adhere to the following terms of service:

I. Appropriate Use

Individuals using this service are required to:

- Follow the "Guidelines for Appropriate Use of University of Wisconsin-Madison Information Technology Resources", located at http://www.doit.wisc.edu/security/policies/appropriate_use.asp.
- Protect the privacy and confidentiality of student, patient, employee and other institutional information, as required for example by FERPA (privacy of student information) described at <http://registrar.wisc.edu/ferpa/>, and HIPAA (privacy of patient information) described at <http://www.wisc.edu/hipaa/>.
- Comply with all other applicable University policies, State and Federal laws, including for example: copyright law, described at <http://www.copyright.gov/help/faq/> and the student code of conduct, located at <http://www.wisc.edu/students/misconduct.htm>.

II. System Use

My WebSpace is available only to UW-Madison students, faculty and staff with an active NetID.

- You are responsible for the integrity of your data files.
- We recommend that you keep backup copies of your critical files on other media, such as a local hard drive, CD-ROM, and/or zip disks. In the unlikely event that there is a system outage, your online files will not be accessible until service returns.
- Before you leave the University, be sure to download copies of your data to other media, such as a local hard drive, CD-ROM, and/or zip disks.
- My WebSpace administrators will verify your eligibility after each fall and spring semester begins. If you are no longer eligible for My WebSpace at those times, you will be notified and your files will be deleted.
- My WebSpace allows for 1GB of disk space for storage and 400MB/hour for uploading and downloading of files.

III. Privacy Statement

UW-Madison respects the legitimate privacy interests of My WebSpace Users within appropriate limits for educational, ethical and legal reasons.

- My WebSpace administrators routinely monitor the volume of My WebSpace traffic for system management purposes.
 - Usage may also be subject to security testing and monitoring.
 - If the University receives a credible report that a violation has occurred, or if, in the course of managing the service, discovers evidence of a violation, then the matter will be referred for investigation, University disciplinary action, and/or criminal prosecution.
 - Complaints that specific material violates the law or University policy should be reported to Badger Incident Response Team (BadgIRT), as described at:
https://www.doit.wisc.edu/security/report_incident/index.asp.
 - If you are employed by the University, you should be aware that any documents that you save or publish in My WebSpace may be subject to the Wisconsin Open Records Act. For more information on the Records Management, please go to:
http://archives.library.wisc.edu/rm/manual/ManualLegal_ch6_.html
-

Prerequisites

The Xythos Drive is a desktop application that must be installed on each computer where it will be used. To install the Xythos Drive, the user must have Administrator rights on the computer. Once the Xythos Drive has been installed, the user does not need Administrator rights to use the software.

Requirements for the Xythos Drive:

- **Operating Systems:**
 - Windows 2000
 - Windows XP Home
 - Windows XP Professional
 - Windows Vista
- **Hard disk space (calculate by adding up the following three items):**
 - 10MB for base install
 - Total size of all files you will require to be available offline
 - 2 * the size of all files you will be actively working with
- **Internet connection**

Running with a Virus Scanner

If you are running a real-time virus scanner, it is recommended that you configure the virus scanner to exclude scanning of the Xythos Drive cache. Doing this provides a noticeable performance improvement when working with the cache, such as during opening and editing of files. Excluding the cache from the virus scanner does not compromise the security of the system. The cache is located in the folder C:\Documents and Settings\

Refer to your virus scanner's instructions to learn how to exclude specific directories from being scanned.

Uninstalling Xythos Drive

The Xythos Drive can be uninstalled in a couple of ways.

To uninstall Xythos Drive from the Control Panel:

1. Open the Windows Control Panel.
2. Select **Add/Remove Programs**.
3. Scroll down and select **Xythos Drive**.
4. Click **Change/Remove**.
5. Follow uninstall wizard instructions.
6. When uninstall is complete reboot your computer.

To uninstall Xythos Drive from the Windows Programs menu:


1. In the taskbar, click **Start**, select **Programs**, and then select **Xythos Drive**.
 2. Select **Uninstall Xythos Drive**.
 3. Follow uninstall wizard instructions.
 4. When uninstall is complete reboot your computer.
-

Working Online

To access server-based files you must first establish a connection with the server. To make the connection, the Xythos Drive needs information, such as the server address, the folder to connect to, your identification, etc. This information is saved in a *service*.

For help creating and configuring a connection to the My WebSpace service, please refer to the **Connecting to My WebSpace** chapter on page 25. It is also possible that your administrator has already pre-configured a service for you to use. In this case, you can simply proceed to the next step.

Connecting to a server

1. To display the **Xythos Drive** window, in the Windows system tray, click the **Xythos Drive** icon .
2. On the **Xythos Drive** window, click the **Connect** tab.
3. Right of the **Service** box, click the **Service Name** arrow to view the available services, and then choose the name of the service that you want to use.
4. In the **Drive** box, select the drive letter you want the service to be mapped to, if you do not want to use the default.
5. Click **Work Online**.
6. Enter your *Username* and *Password*, if necessary.

In Windows Explorer you will now see a drive letter mapped to the folder specified in the service you selected. You can access the contents of that folder in the same manner you use files and folders located on your local hard drive.

If you have trouble connecting..

If you are having difficulty connecting to the server you should do the following things:

- Verify the computer has an established Internet connection. A good test is to use a web browser to access the server. If the web browser can not access the server, then it may be a networking issue.
- If you must use a proxy to access the server, then make sure you have correctly configured it on the **Advanced** tab. Please see the Chapter 16 for more information on the configuration options.
- Make sure all the service settings are correct. On the **Connect** tab, click the **Service** arrow, and then click **Edit** to view the service properties. Verify the server URL. Click the (...) button to the right of the **Server URL** box to view and verify the **Use secure connection** setting.

For more information about creating services refer to the **Connecting to My WebSpace** chapter page 25.

Working Offline

Using your Xythos Drive to turn the Internet into a virtual hard drive offers many advantages. However, an Internet connection may not always be available. With Xythos Drive you can access recently used files or files you have selected to always be available offline, even when the Internet is not available.

Connect to the server in offline mode

1. On the **Connect** tab, click the **Disconnect** if necessary. You need to disconnect before you can work offline.
2. In the **Drive** box, choose a *drive letter* or use the default, and then click **Work Offline**.
3. If you see a dialog box, type your *username* and *password*, and then click **OK**.

Making files and folders available offline

Any files that have been opened recently will be available when you are offline as long as the local cache has not been cleared. To make sure that important files are always available offline, they should be marked as such. You must be connected to the service to select files and folders to be available offline.

Use Windows Explorer to select files and folders to access offline:

1. Using **Windows Explorer**, right-click to select a file or folder to make it available offline, and then select **Always Available Offline**.
 2. If you select a folder:
 - a. On the **Confirm Offline Subfolders** dialog box, select **No** to make only the files in the selected folder always available offline, or select **Yes** to also make all subfolders and their contents also available offline.
 - b. New Folders created in a folder that has been marked as always available offline will automatically be available offline.
-

Files selected for offline availability are copied to your local hard disk, increasing local disk usage and possibly slowing folder listings and synchronization.

Displaying offline file status

This feature is not available on Microsoft® Windows Vista™.

You can configure Windows Explorer to display whether a file on your Xythos WebFile server is selected for offline availability.

1. Explore the mapped drive with Windows Explorer.
2. On the **Windows Explorer View** menu, select **Choose Details**. Alternatively, in the **Windows Explorer** window, right-click any column name, and then select **More**.
3. Select the **Xythos Drive Status** check box.
4. Click **OK** to return to **Windows Explorer**.

Files that have been selected to always be available offline have **Present offline** in the **Xythos Drive Status** column.

Working with offline files

1. Make sure all files from your mapped are closed.
2. To display the **Xythos Drive** window, click the **Xythos Drive** icon in the **Windows** system tray.
3. On the **Xythos Drive** window, click the **Connect** tab.
4. Click the box containing service names **Service Name** to view the available services, and then choose the name of the service that you want to use.
5. If the status is **Working Online**, then click **Disconnect**.
6. Click **Work Offline**.

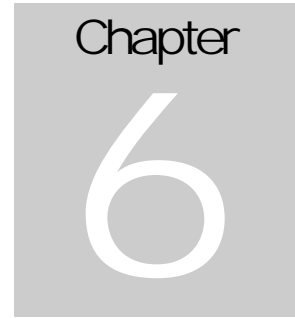
When your folders and files are available for access offline, a red **X** appears over the drive when you open My Computer or Windows Explorer. As you browse your files you will notice that the files and folders that are not available while you are working offline appear dimmed.

Synchronizing offline files

After you have been working offline for a while, it is likely that you will need to synchronize your work with the server. Xythos Drive is set up to automatically synchronize with the server changes made while working offline the next time you connect to the server. If you uncheck this option, your files will not synchronize.

If a file you have edited has been updated on the server since you last synchronized, possibly by another user, you will get prompted with a dialog asking you what action to take. You can either choose to overwrite the other user's edits, to save your changes to another location, or to discard your edits.

To manually synchronize your files, on the **Xythos Drive Offline** tab, click **Synchronize Now**. The local cache will be updated with the latest copies from the server. The server will not be updated with the latest copies from the cache. To synchronize from the desktop to the server, you must choose one of the automatic synchronize options.



Using Windows Explorer

Xythos Drive is primarily used with Windows Explorer, allowing you to work with files and folders in your account the same way you work with files and folders that are on a local drive. Standard drag and drop operations are supported by Xythos Drive. In addition, there are several other features that you can use when working within Windows Explorer.

Creating an Intellittachment

1. Right-click either a server-based or local file, you see a menu selection, **Create Intellittach**.
2. In the **Intellittach** dialog box, choose to send the file as link (read access permissions are required to view) or a ticket (no access permission required). An email message with the file's URL in the message body is created.
3. Complete the message, and then click **Send**. The next time you run your email program, the message is sent.

Recipients see an attachment and a link in the message body, and can access the file using either one. If you sent a link, they will be asked to login to access the link, or the attachment.

For more information on using Intellitach, please see Chapter 12.

Copying URL to Clipboard

When you right-click a file or a folder, you will see a menu selection, **Copy URL to Clipboard**. This command copies the full My WebSpace URL to your clipboard. You can then paste this URL into an email message, an instant messaging session or into another document.

When you use this feature, recipients with read or write permissions directly access the file. They have access to your latest changes, and if they have write access, can

make changes to the original file. When used with versioning and locking, this is an effective way to collaborate.

Setting up Subscriptions

Subscriptions are email notifications that you receive letting you know when someone has accessed a file or folder. You may create a subscription for any file or folder in your account. To setup a subscription:

1. In **Windows Explorer**, locate the file or folder.
2. Right click the *file* or *folder*, and then select **Subscriptions**.
3. A browser window will open and you will be asked to log in to your My WebSpace account.
4. Click the **Create Subscription** button in the top toolbar.
5. Fill in the required information:
 - a. Select the events you want to initiate an email notification.
 - b. Select when you want the notification sent. You can choose to have the notification sent immediately when the action takes place or as part of a report that is sent on a daily basis.
6. Click **Ok**.
7. Close the browser.

Starting and Stopping Access Logging

Logging allows you to keep a record of who accesses your files and when they do so. You can start and stop logging, and you can view the history of who has accessed the file while logging was enabled.

To enable Access Logging on a file:

1. In **Windows Explorer**, locate the file.
 2. Right click the file, and then select **File Access Log**.
 3. A browser window will open and you will be asked to log in to your My WebSpace account.
 4. To start logging, in the browser window that opens,
 5. To start logging, click the **Enable Access Logging** button in the top toolbar.
 6. To stop logging, click the **Disable Access Logging** button in the top toolbar.
 7. To view the log, click the **Refresh Log** button in the top toolbar.
-

8. When you are finished, close the browser.

To enable Default Access Logging on a folder:

1. In **Windows Explorer**, locate the folder.
2. Right click the file, and then select **Manage**.
3. A browser window will open and you will be asked to log in to your My WebSpace account.
4. Click on the Default Logging link.
5. In the drop down menu, select On.
6. If you would like this setting to apply to all files and folders that are currently in this folder to have logging On, check the box.
7. Click "Apply Now"
8. When you are finished, close the browser.

Displaying Xythos Drive Status column

This feature is not available on Microsoft® Windows Vista™.

You can view additional information on the files and folders contained within a Xythos Drive mapped drive in Windows Explorer. This information includes locks and offline availability. To view this information in the Explorer window, you must enable the **Xythos Drive Status** column. To do this:

1. In **Windows Explorer**, select the drive that corresponds to the service.
 2. On the **View** menu, click **Choose Details**.
 3. In the displayed window, select the **Xythos Drive Status** check box.
 4. Click **OK**.
 5. To display the **Xythos Drive Status** for all folders on your computer, on the **Tools** menu, select **Folder Options**.
 6. Click the **View** tab.
 7. Click **Apply to All Folders**.
 8. Click **OK**.
-

When a file is locked, this column will also display **Locked by *user name***. Files that have been selected to always be available offline have **Present offline** in the **Xythos Drive Status** column.

Displaying the Display Name column

This feature is not available on Microsoft® Windows Vista™.

You must be connected online in order to use this feature.

Displayname is a standard WebDAV property. It is intended to be used by servers that generate file names as user-friendly identification. On a Xythos server, where file names are defined by the user, the displayname is the same as the user given file name.

You can view the displayname property for files and folders in a separate column in Windows Explorer. This is very helpful if the server uses the displayname property to identify the file. To do this:

1. In **Windows Explorer**, select the drive that corresponds to the service.
2. On the **View** menu, click **Choose Details**.
3. Scroll the window and select the **Display Name** check box.
4. Click **OK**.
5. To display the **Display Name** column for all folders on your computer system, on the **Tools** menu, select **Folder Options**.
6. Click the **View** tab.
7. Click **Apply to All Folders**.
8. Click **OK**.

The Xythos Drive still uses the standard name for all of its operations, not the *displayname*.

Adding and Deleting Custom Properties

You must be connected online in order to use this feature.

You can create custom properties for files.

1. Using **Windows Explorer**, locate the file.
 2. Right-click the file or folder, and then select **Properties**.
 3. In the displayed window, select the **Xythos Drive** tab.
 4. In the **Name** box, type the *property name*.
 5. In the **Value** box, type a *property value*.
-

6. Click **Add Property**. The new property and value are displayed in the **Properties** box.
7. To save the new property, click **Close** or **Apply**.

To delete a custom property:

1. In the **Properties** box, select a property.
2. To select multiple properties, press the CTRL key as you select each one.
3. Click **Delete Property**, and then click **Close** or **Apply**.

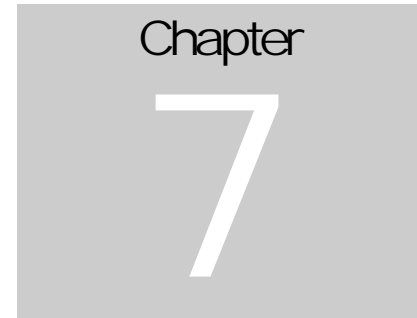
Although **displayname** is listed in the **Properties** box, you can not delete it.

Modifying Custom Properties

You must be connected online in order to use this feature.

You can create, view, edit and delete custom properties for files. To work with the WebDAV properties for a file:

1. Using **Windows Explorer**, locate the file.
 2. Right-click the file or folder, and then select **Properties**.
 3. In the displayed window, select the **Xythos Drive** tab.
 4. In the **Name** box, type the *property name* of the property you want to change.
 5. In the **Value** box, type the new *property value*.
 6. Click **Modify Property**. The property and new value are displayed in the **Properties** box.
 7. To save the new property, click **Apply** then **Close**.
-



Sharing Files and Folders

You can use the Xythos Drive to view, add and remove permissions from your files and folders. The permissions are controlled and maintained by the server. You can share your files with individual users or groups of users by giving them one or more of permissions:

Read Permission

Read permission allows other users or groups of users to view your file or folder. If a user has read permission on a folder but does not have read permission on all of the contents of that folder, the user will see only the file and folders in which the user has read permission.

Write Permission

Write permission allows other users or groups of users to edit the file or folder. Write permits the editing and viewing of the properties and contents of that item, as well as renaming the item, if the user also has delete permission on the item.

Delete Permission

Delete permission allows other users or groups of users to move the file or folder to the Trash.

Administer Permission

Administer permission allows other users or groups of users to change permissions of the file or folder.

Viewing permissions

To view the permissions that exist on a file or folder:

1. Using **Windows Explorer**, locate the file or folder.
 2. Right-click the file or folder, and then click **Sharing**.
-

The **Share with users** box lists all of the users with permission to access the file or folder. Depending on the way your server is set up, certain users or groups, below, may appear in the list:

Owner

This is the user that owns a file or folder.

Authenticated Users

These are any other users within the same Xythos system as you. Use this category to share your file and folder with all users of your Xythos system.

Public

Any user accessing the Xythos system without an account. Use this category for making your files and folders public to the outside world.

Other users that have been given privileges will also be listed.

3. Under **Share with users**, select a user or group to display in the **Permissions** box, all permissions for that user will be marked.

Removing permissions

To remove a user's or group's permissions for a file or folder:

1. Using **Windows Explorer**, locate the file or folder.
2. Right-click the file or folder, and then click **Sharing**.
3. **Share with users** lists all of the users with permission to access the file or folder. Select the user or group whose permissions you would like to remove, and then click **Remove**.
4. To save these changes, click **Apply**, then click **OK**.

Changing permissions

To change a user's or group's permissions for a file or folder:

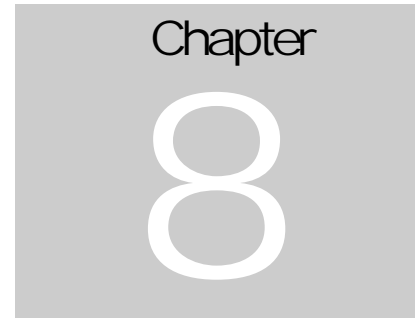
1. Using **Windows Explorer**, locate the file or folder.
 2. Right-click the file or folder, and then click **Sharing**.
 3. **Share with users** lists all of the users with permission to access the file or folder. Select the user or group whose permissions you would like to change.
 4. In the **Permissions** box, select or clear the appropriate check boxes.
 5. To save these changes, click **Apply**, then click **OK**.
-

Adding Permissions

This feature is not currently available on Microsoft® Windows Vista™.

To add a user or group to a Permissions list:

1. Using **Windows Explorer**, locate the file or folder.
 2. Right-click the file or folder, and then click **Sharing**. The **Sharing Options** dialog box lists the users that have permission to access the file.
 3. To share the file or folder with a user or group not listed, click **Add**.
 4. In the **Search for** box, type * to list all names, type a *partial name* to lookup all users and groups whose name includes the *partial name*.
 5. In the **IN** box, select either the **Display Name** or the user **ID**. **Display Name**, like the *displayname* property, is a user-friendly name. If you select **ID**, Xythos on Demand usernames are searched.
 6. To get as list of all users and groups with *partial name* in their name, click **Search**.
 7. Select one or more of the names within the **Users found** area. Press the **CTRL** key or **Shift** key to select more than one user, and then click **Add selected users**.
 8. Select a user or group, and then set permissions by selecting all check boxes that apply. Repeat this step for each user and group added.
 9. To save these changes, click **Apply**, then click **OK**.
-



Locking Files

Locking a file helps prevent other users from editing or saving changes for a particular period of time. When you open a file that you have permission to edit, Xythos Drive automatically locks the file for 15 minutes. While the file is still open, the lock is continually refreshed. When you close the file, Xythos Drive unlocks the file.

You can explicitly lock files through the Xythos Drive. This helps prevent other users from editing files that you are working on. Once you are done editing the file, you should unlock it to allow other users to edit it. An item stays locked until you release it or the lock expires in 7 days.

You can not lock folders through the Xythos Drive.

Locking a file

To lock a file:

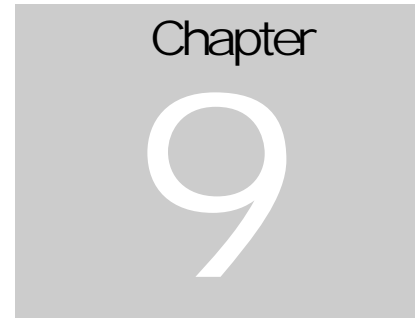
1. Using **Windows Explorer**, locate the file.
2. Right-click the file, and then select **Lock File**. To select adjacent multiple files, while selecting press the **SHIFT** key while you select the first and last file in the group. To select multiple files that are not adjacent, press the **CNTL** key while you select the files.
3. In the **Locking Options** dialog box, set the **Lock Period** and click **OK**.
4. No confirmation message is returned, unless the lock request failed.

If you have configured Xythos Drive to display the status of files on the server, **Locked** is displayed in the **Xythos Drive Status** column.

Unlocking a file

To unlock a file:

1. Using **Windows Explorer**, locate the file.
2. Right-click the file or folder and select **Unlock File**.
3. No confirmation message is returned, unless the lock request failed.



Versioning

Versioning is a useful way to keep track of the changes made to any file where versioning is turned on. The system will automatically keep a copy of the file each time it is saved. If you and other users edit the same file, versioning allows you to revert to a previous copy if necessary, providing an automatic backup for overwritten files.

When versioning is selected for a file, you are automatically given the option to Check Out the file. Checking out a file allows a user to edit the file and save it multiple times without creating a new version each time it is saved. Checking out a file also creates a lock (if the file is not already locked) on a file which prevents other users with write permission on that file from editing it. Checking out a file does not, however, prevent users with read permission from seeing the changes made to the file while it is checked out. Users will be able to see the very latest version of the file whether or not the file has been checked in.

Checking in a file creates a permanent version of the file that encompasses all changes made while the file was checked out. Checking in a file also removes the lock on the file.

Versioning can only be set for files, not folders, through the Xythos Drive. Versioning can only be set for a file by a user with Administer permission for the file.

Enabling versioning

To enable versioning on a file:

1. Using **Windows Explorer**, locate the file.
2. Right-click the file, select **Versioning**, and then select **Enable Versioning**. The system will now automatically create a new version every time the file is saved.

No confirmation message is returned, unless the request fails.

Disabling versioning

To disable versioning on a file:

1. Using **Windows Explorer**, locate the file.
-

2. Right-click the file, select **Versioning**, and then select **Disable Versioning**. The file is no longer versioned.

Checking a file out for editing

When a file is versioned, you may check it out to ensure it does not get edited by someone else until you have checked it back in. To check a file out:

1. Using **Windows Explorer**, locate the file.
2. Right-click the file, select **Versioning**, and then select **Check Out**. The file is now locked. No other users can save a version of the file until you have checked it back in.

Checking in a file after editing

When you are done editing a file that you have checked out, you should check it in to allow other users to edit the file. To check a file in:

1. Using **Windows Explorer**, locate the file.
2. Right-click the file, select **Versioning**, and then select **Check In**. The file is now unlocked and a new version created.

Undoing a check out of a file

If you decide that you do not want to check a file out, or that you want the current version to remain without adding new versions, you can easily undo the check out.

To undo a file check out:

1. Using **Windows Explorer**, locate the file.
2. Right-click the file, select **Versioning**, and then select **Undo Check Out**. The file is no longer checked out.

Viewing version history

You can view the version history of a file, as well as save prior versions to another location to view them. To do this:

1. Using **Windows Explorer**, locate the file.
 2. Right-click the file, select **Versioning**, and then select **List Version History**.
 3. The resulting dialog displays the version history of this file.
 4. Select a prior version, and then click **Save As** to save the version to another location.
-



Personalizing the Xythos Drive for My WebSpace

The Xythos Drive can be configured and fine tuned in many ways. The Personalizing Xythos Drive pages describe each control of the user interface.

To Personalize the Xythos Drive, click the Xythos Drive icon in the Windows system tray. You will see the following tabs:

Connect

The Connect tab is used to define Services and connect them.

Intellittach

Intellittach is a simple and effective way to send email attachments as HTTP links.

Offline

This section describes the various settings associated with working Offline.

Options

The Options tab exposes several controls that let you fine tune the behavior of Xythos Drive.

Backup

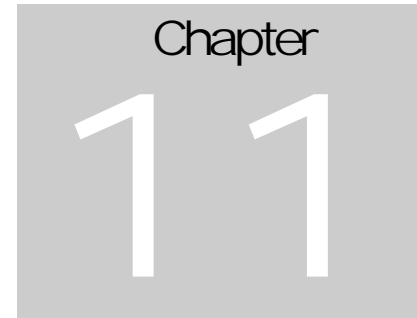
The Backup tab is used to select and schedule the files you want backed up.

Advanced

The Advanced tab exposes additional controls for tuning the behavior of Xythos Drive.

About

The About tab gives you version information on the Xythos Drive.



Connecting to My WebSpace

To use Xythos Drive to access files on the server, a connection between Xythos Drive and the server must be established. A *service* identifies the server you want to connect to, your username, and other information Xythos Drive needs to be able to make the connection. The **Connect** tab is used to define, connect and monitor services.

Creating a service

You can define up to 66 services. If you have accounts on different servers, you can set up a service for each server. You can also define different services for the same account to connect directly to different folders on the same server.

1. On the **Connect** tab, click the **Service** arrow to display the **Service** menu, and then click **New**.
 2. In the **Service** box, type a *service name*. The name must be unique; if you choose an existing name, Xythos Drive will automatically add a number to make it unique.
 3. In the **Server URL** box, type the *My WebSpace address* of the account you are want to connect to. Since you will be connecting to a secure server, you must include the prefix `https://`. To connect to your personal My WebSpace account, enter the following <https://mywebspace.wisc.edu/NetID>, where NetID is your UW Madison NetID.
 4. To connect to a My WebSpace Group Directory, enter the following <https://mywebspace.wisc.edu/groups/directoryname>, where `directoryname` is the name of the Group Directory you would like to access.
 5. If you want Xythos Drive to save your user identification so you will not have to enter it every time you connect, in the **Username** box, type your *username*.
-

6. If you want Xythos Drive to save your user password so you do not have to type it each time you connect, in the **Password** box, check the **Save password** check box, and type your *password*.

Your username and password identify your account on the server you are accessing. Xythos Drive needs this information for you to access your account data. If you do not have an account on the server, you can not connect to it. If you leave either of these boxes blank you will be prompted for the information when you connect to the service.

Running a service (connecting to your account)

Running a service is similar to mapping a network drive in Windows; it is a way to associate a local drive letter with a folder on another computer on the network, so that you can access files located on the server just like you access local files.

Your administrator may have already pre-defined services for your Xythos Drive.

To make a connection to a server:

1. On the **Connect** tab, click the **Service** box to display the available services, and then choose a *service*.
2. In the **Drive** box, choose a *drive letter* or use the default, and then click **Work Online**.
3. If you see a dialog box, type your *username* and *password*, and then click **OK**.

Ending a service (disconnecting from your account)

You can end a service in two ways:

To end a running service, on the **Connect** tab, click **Disconnect**

or

In the **Windows Explorer** window, right-click the mapped drive, and then select **Disconnect**.

Changing server properties

In most cases the default server properties will be sufficient. However, depending on the type and configuration of the service you are adding, you may also need to make changes to the default property values.

1. On the **Connect** tab, click the **Service** box to display the available services, and then choose a service name.
-

2. Click the **Service** arrow, and then click **Edit** to view the service properties.
3. To the right of the **Server URL** box, click the (...) button.

By default you will see the settings to your home directory.

To select a folder on the server:

1. On the **Server URL** dialog box, in the **Server directory** box, type the *folder name*.
2. If you have no further changes to server properties, click **OK**.

A computer typically has one physical connection to the network. All data destined for a particular computer arrives through that connection. The network port number identifies the data to applications on the server. The server you are connecting to and Xythos Drive must both agree to use the same port number. Port 80 is the standard port number for HTTP traffic, which is processed by a Web server. Port 443 is the standard port number used for secure (encrypted) HTTP data, or HTTPS. Under some circumstances you may need to change the port number.

To change the port number:

1. On the **Server URL** dialog box, in the **Port** box, type a *port number*.
2. If you have no further changes to server properties, click **OK**.

To make a secure connection:

1. To connect to the server using secure communication, select the **Use secure connection** check box.
2. If you have no further changes to server properties, click **OK**.

Changing advanced service properties

Depending on the type and configuration of the service you are adding, you may also need to define the service's advanced properties.

1. On the **Connect** tab, click the **Service** box to display the available services, and then choose a service name.
 2. Click the **Service** arrow, and then click **Edit** to view the service properties.
-

3. To view and change other service properties click **Advanced**.
4. Select the advanced properties you need.

Do not adjust server time to local time Xythos Drive displays the date and time using the settings of the machine where the Xythos Drive is installed. If you want to display date and time based upon the server, select this option.

Bypass proxy server for this Service Xythos Drive can use a proxy server to connect to a service. Proxy settings are configured on the Advanced tab. If you do not need to use a proxy server to connect to a Service, select this option.

Startup mode This option is used to select the state of the service when Xythos Drive is started.

Online - connect to the server

Offline - work offline with files selected as always available offline

Disconnected - do not attempt to connect this service or to work offline

Sharing Level	Initial Folder Listing	Refresh Time	Auto locks	Check Before Open
None	From cache	60 min	Never	No
Light	From cache	15 min	Yes	Yes
Medium	From server	5 min	Yes	Yes
Heavy	From server	1 min	Yes	Yes

Initial Folder Listing: If Sharing Levels is None or Light, when you connect to the service the folder list is retrieved from the Xythos Drive cache so that you can immediately start browsing folders. If you haven't connected recently, the folder listing may be temporarily incorrect while Xythos Drive refreshes it. If Sharing Level is Medium or Heavy, when you connect to the service the folder list is retrieved from the server first before displaying it. This ensures that the folder list is accurate, but you must wait for the refresh to complete before you can start browsing.

Refresh Time: Windows makes lots of requests for folder listings. If all folder listing requests are sent to server, response time will be poor. Instead, the folder listings are cached. When Windows requests a folder listing and the refresh time is expired, the cached listing displays immediately, and then a request to update the folder

listing is sent to the Xythos on Demand server.

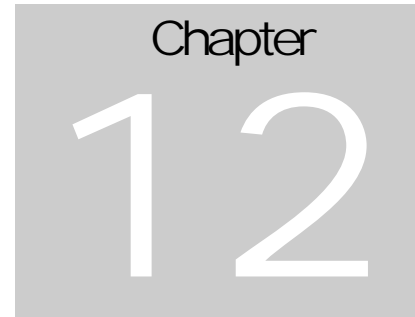
To manually update the folder listings from the server, on the Xythos Drive **Options** tab, select **Refresh**. You can also right-click the **Xythos Drive** icon in the system tray, and then select **Refresh**.

Auto Locks: If the sharing level is **None**, the files are never automatically locked. If multiple users edit the file, one user can overwrite the changes another user makes. To prevent this, one of the users should explicitly lock the file until changes are complete.

For the other sharing levels, files are automatically locked when opened, and unlocked a few seconds after being closed. (For some programs like Notepad and WordPad, the file is unlocked as soon as the program that opened it closes.)

Check before open: When this option is active, before a file is opened, Xythos Drive will check to see if a newer version exists, ensuring that even if the folder listings is cached, any open file request will get the most current copy of the file.

Recommendations: Xythos recommends running at **Medium** (default) or **Heavy** sharing level for most users. Running at these levels ensures that users are always working with the latest copy of documents. For environments where there is virtually no collaboration between users, then **None** and **Light** may be used.



Intellitach

Email is one of the easiest and most commonly used vehicles for sharing files and folders. When **Intellitach** is enabled, Xythos Drive can replace file attachments with encrypted links to files. You can use this technology to send local as well as server-resident files. Only one copy of a file is saved on the server, regardless of the number of recipients.

If you use of Lotus Notes or Microsoft Outlook and Intellitach is enabled, the next time you send a message with an attachment, you will see an **Intellitach** dialog box. Intellitach is the Xythos technology that transparently replaces the file with a link. Click **OK** and start sending links. That is the only change you will see.

You attach files to email messages in the usual manner. Xythos Drive adds a link to the file instead of attaching the actual file. You can also right-click the file using Windows Explorer and select **Create Intellitach**. Use the **Intellitach** dialog box to confirm whether you want to send the file as *link*, or a *ticket*. You can also send a regular attachment in email, by selecting attach in your email client, selecting the file to attach and then selecting regular attachment on the Intellitach screen.

Links

A link is used when you send a file to other Xythos users. You decide who has access to the file via the link, and whether each recipient can read, write, or delete it, on an individual basis.

Tickets

Tickets are links that allow users with or without UW Madison NetIDs to access your files. You can grant read or write permissions with tickets. The permissions to be defined once for everyone that uses the ticket, rather than setting permissions per user.

When you send a local file using a link or a ticket, the file is automatically copied to a folder on the server. You must select the attachment folder before using links and tickets. Only one copy of a file is saved in the attachment folder, regardless of the number of recipients.

*Note: Intellittach only works when connecting to My WebSpace using either Microsoft Outlook or Lotus Notes to send email messages. If you use another email program, you can right-click a file or folder name, select **Copy URL to Clipboard**, and paste it into the email message.*

Before you can use Intellittach you must enable the feature, and identify the folder in My WebSpace the Xythos Drive will use to save copies of attachments.

Enabling and Disabling Intellittach

On the **Intellittach** tab, select **Enable Intellittach in Outlook and Notes**. To disable Intellittach and send file as normal attachments, clear this check box. This setting takes effect immediately.

Selecting Attachment Folder

When you use Intellittach to send a file attachment, Xythos Drive automatically copies the file to the server. Before sending links and tickets instead of attachments, you must select the server folder for Xythos Drive to save copies of the attachments.

1. In the **Use this Service when a file needs to be uploaded**, choose the service. If you have access to an Intellittach capable service and it is not showing in this list, connect to the service first.
2. In the **and save the file in this directory** box, select the folder you want attachments copied to. To help you locate the folder, click **Browse**.
3. Select a folder, and then click **OK**.

These settings take effect immediately. Only one service is active at any given time. When you change this setting, the previous service will not be used. If the service containing the attachments folder is not connected, when you send a file while Intellittach is enabled, the service will be automatically connected.

Changing default sending options

If Intellittach is enabled, when you send an email message with an attachment from Microsoft Outlook or Lotus Notes, the Intellittach dialog box is displayed to allow you to change the default sending options.

If you do not want the Intellittach dialog box to automatically appear, on the **Intellittach** tab, select **Do not display Sending Options when sending email**. If you need to change the default sending options, you can manually display the Intellittach dialog box by pressing **SHIFT** when you send the email message.

If this option is not selected, when you click **Send** the Intellittach dialog box will be displayed by your email client.

Sending attachments as links:

On the **Intellittach** tab, under **Default Sending Options**, select **Link**.

When you send an attachment as a link, the recipient must have **Read** permission on the file to access it. To ensure that the attachment can be read:

Click **Link Options**, and then choose **Change Permissions**.

The **Sharing Options** dialog box will be displayed whenever you send attachments as links, giving you the opportunity to change file permissions at that time.

Sending attachments as tickets:

When you send an attachment as a ticket, you do not have to consider the file's permissions. With tickets anyone that receives the email message (either directly from you, or because it was forwarded by one of your recipients) can access the attached file, whether they have an account on the server or not.

To send attachments as tickets:

On the **Intellittach** tab, under **Default Sending Options**, select **Ticket**.

You can decide whether your recipient has write permission or not.

Press **Ticket Options** to select **Read and Write** or **Read Only** permissions for the recipients.

Tickets expire after a certain period of time. Once a ticket expires, your recipients can no longer access the attachment. The default lifetime is 30 days. You can change the lifetime in the **Ticket Options** box.

In summary, sending attachments as links is more secure. You can identify specific users and grant them individual permissions. When you send tickets, you don't have to consider permissions, but anyone receiving it can access it.

Chapter 13

Offline

To ensure the files and folders you need are available when you are offline, you need to identify them to Xythos Drive cache. You can choose to have Xythos Drive synchronize these files when you connect to and/or disconnect from the server.

Xythos takes care of keeping files selected to be available offline synchronized between your local PC and your account. By default, synchronization will occur when you connect and when you disconnect.

Use the features available on this tab to select the files you want to use offline, to synchronize your offline files with the files on the server, and to select when you want synchronizations to occur.

Synchronization Options

- | | |
|-------------------------|--|
| On connection | If selected, when you connect online Xythos Drive synchronizes the local copies of offline files with the corresponding files on the server. By default, this option is selected. |
| On disconnection | If selected, when you disconnect Xythos Drive synchronizes the local copies of offline files with the corresponding files on the server. To end a connection, press the Disconnect button on the Connect tab, or in Windows Explorer , right-click the mapped drive and select Disconnect . When you exit Xythos Drive all connected services are disconnected and no synchronization occurs, regardless of this setting. By default, this option is selected. |

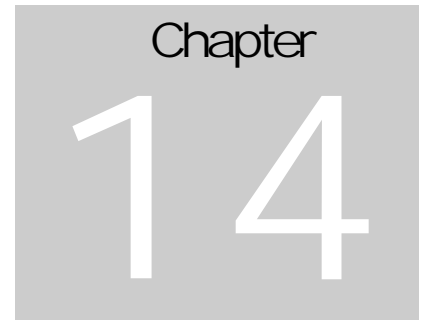
Note: If neither of these settings is selected, your files will not be synchronized.

- | | |
|------------------------|---|
| Synchronize Now | Click this button to immediately synchronize the local copies files selected as always available offline with the corresponding files on the server. Please |
|------------------------|---|
-

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USER MANUAL

note that the server files will overwrite the local files using this option.





Options

There are several options available for customizing Xythos Drive. The optional parameters apply across all Xythos Drive services. You may edit these settings on the **Options** tab.

Status Monitor Settings

When Xythos Drive begins transferring a file, or requesting data from a server, a message appears in the Status Monitor. For file transfers or other requests that take over three seconds, the Status Monitor is displayed to notify you of the activity. To control when the Status Monitor is displayed, go to the **Options** tab, under **Status Monitor Settings**, select one of the following:

- Show on errors only** The Status Monitor appears if Xythos Drive is unable to connect to a service.
- Show when necessary** The Status Monitor appears when Xythos Drive is waiting for a file to be uploaded or downloaded.
- Show always** The Status Monitor appears whenever any activity on a service connection takes longer than 30 seconds.

Miscellaneous Settings

- Open Explorer window after connection** If you select this option, a Windows Explorer window will open whenever you manually connect to a service. This setting does not apply to services that are connected automatically when Xythos Drive starts. By default, this option is selected.

Cache Settings

The cache is the area of your local hard disk that Xythos Drive uses to save copies of recently used files and folders. Keeping this information in the cache ensures faster access by eliminating the need to retrieve the file or folder from the server on subsequent usage. And, because these files are in the cache, they may be available offline whether they have been selected for offline access or not.

Cache size	If the cache size is too small, Xythos Drive spends time deleting old files to make room for newly accessed files. For best performance the Cache size should be no less than the total size of all the account files you regularly access. The default is 64.
Clear cached files upon disconnect	When this option is selected, the files from a drive that are in the cache are cleared when that drive is disconnected.
Clear Cached Files	When you click this button, all cached files are deleted, forcing the Xythos Drive to download files from your account the next time you access them. If other users edit a file this feature ensures you access the most recent version, possibly with other users' changes. However, performance will be temporarily reduced.
Refresh	When you click Refresh , the next time you open a folder Xythos Drive will obtain the folder listing from the server rather than from the cache, ensuring you are working with the most up-to-date folder information.

ZoneAlarm Configuration

If you are using ZoneAlarm you will need to do some additional configuration in order to allow Xythos Drive to properly work with this firewall.

Normally, ZoneAlarm blocks low-level access to remote servers. Therefore, in order for Xythos Drive to access a server, you must add it to the list of permitted servers in ZoneAlarm.

1. On the ZoneAlarm main window, select the **Security** tab.
 2. Click the **Advanced** button. (For ZoneAlarm Pro users, select the **LocalZone Contents** tab.
 3. Click the **Add** button, and select **Host/Site**.
-

MY WEBSITE XYTHOS CLIENT
USER MANUAL

4. Enter a description and the host name of the server you want to access with Xythos Drive. To access My WebSpace you would enter mywebsitespace.wisc.edu as a host name.



Chapter
15

Backup

You can set Xythos Drive to automatically backup files not permanently stored on the server, such as the My Documents folder. Xythos Drive's Backup provides a simple way to back up files on your local hard disk. Select the files or folders to backup, the location you want them backed up to, and the schedule for backing them up. The files are copied to the server maintaining the same folder structure and with no modifications or file compression, making it easy to browse or restore the files. After the initial backup, only files that have changed will be copied to the server.

Backup Options

Store files on	You can store files on any Services you have defined.
in the directory	This box contains the name of the folder your files will be backed up to. If you have not selected a backup directory, this box contains ?\Backup. Click the Browse button to select a different folder or do not make a change and Xythos Drive will create a folder named Backup on the selected server.
Files to be backed up...	This allows you to select the files to backup. Put a check next to the folders or files to backup. When you select a folder, all files and subfolders are selected. Double-click folders to find and select individual files.
Schedule	Press this button to set the schedule to backup files automatically. Select Schedule backup , if you want backups to be done automatically. Then specify if you want them run Daily or Weekly , and the time to

start. If Xythos Drive is not running at the specified time, you will be asked if you want the backup to run the next time Xythos Drive is started.

Backup files now Press this button to run a backup immediately.

Selecting Files and Backup Location

1. In the **Store files on** box, choose a server to store the backup files on by selecting a *service*.
2. The **in this directory** box, indicates the folder on the server that will be used to backup the selected files. If you have not selected a backup directory, this box contains **?\Backup**.
 - a. Click the **Browse** button to select your *backup* folder,

or
 - b. Do not make a change and Xythos Drive will create a folder named **Backup** on the selected server.
3. Click **Files to be backed up**.
4. Click the box to the left of every folder you want to backup. When you select a folder, all files and subfolders are selected. Double-click folders to find and select individual files.
5. Click **OK** when you have finished selecting files and folders.

To Schedule Daily/Weekly File Backups

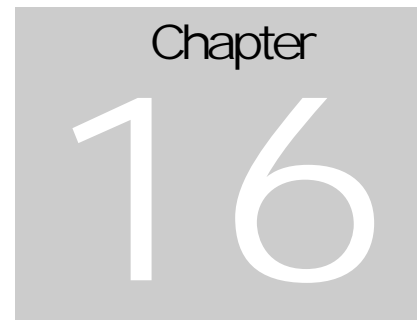
1. On the **Backup** tab, click the **Schedule** button.
2. Select **Schedule backup**.
3. Select **Daily** or **Weekly**.
4. If you selected **Weekly**, choose one or more days you want the backup to occur.
5. Choose **Start time**.
6. Click **OK**.

To Do a One-time File Backup

If you want to backup your files but prefer to not have this be a scheduled task, you can run the backup manually. This is also an easy way to copy a large number of files from your local hard drive to a server. To do this:

1. In the **Store files on** box, choose a server to store the backup files on by selecting a *service*.
 2. The **in this directory** box, indicates the folder on the server that will be used to backup the selected files. If you have not selected a backup directory, this box contains **?\Backup**.
 - a. Click the **Browse** button to select your *backup* folder,

or
 - b. Do not make a change and Xythos Drive will create a folder named **Backup** on the selected server.
 3. Click **Files to be backed up**.
 4. Click the box to the left of every folder you want to backup. When you select a folder, all files and subfolders are selected. Double-click folders to find and select individual files.
 5. Click **OK** when you have finished selecting files and folders.
 6. Click **Backup files now** to begin the backup.
-



Advanced

The Advanced tab provides extended configurations for Xythos Drive.

Proxy Settings

Xythos Drive will detect and configure any necessary parameters for proxies or firewalls. However, you can be more explicit about these detections by manually configuring your proxy settings.

When Xythos Drive is first installed, the settings will be set to **Auto-detect on connection**. Once a connection has been made, it will be set to either **Direct connection, no proxy** or the actual proxy address.

To Set a Proxy Address Manually:

1. Press the **Change Proxy Settings** button.
2. Click the **HTTP(S)** check box until a solid checkmark appears and the **Proxy server** box is clear.
3. In the **Proxy server** box, enter the proxy address. If you would like to have Xythos Drive run the auto-detect again, click the check box until the check mark appears dimmed.
4. Click **OK**.

To Set a Proxy Authentication information:

1. Press the **Change Proxy Settings** button.
 2. Under **HTTP Proxy Authentication**, enter the *Username* and *Password* for your proxy server.
 3. Click **OK**.
-

User Settings

User Identification	If there are multiple user accounts on the local operating system, identify the current user for Xythos Drive to use when creating locks on files or folders.
Language	Xythos Drive screens can be displayed in several languages. To change the current language, select it from the Language list. The new language selection will be used the next time Xythos Drive is started.

Logging Options

When you report a problem the log files can help identify the cause of the problem. When you contact DoIT for support, you may be requested to forward these files. To improve support, Xythos Drive is installed with logging enabled. The log files are stored on your machine in your Documents and Settings folder, usually located at **C:\Documents and Settings\PC user account name\Local Settings\Application Data\Xythos\cache\logs**. If you do not see this folder, Windows Explorer may need to be set to show hidden files. On the **Tools** menu, select **Folder Options**. On the **View** tab, select **Show hidden files and folders**, and then click **OK**.

Each check box controls a different area of logging.

Log HTTP exchange	Includes all information about communication between Xythos Drive and the server, except folder listings, in the log file.
Log monitor messages	Includes the messages that appear in the Status Monitor in the log file.
