User Guide

June 2023
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Introduction

Quark Docurated (or Docurated) is a SaaS solution for content management and content intelligence. Docurated has machine learning capabilities and broad scope for integration that allow you to curate and share multi-format content from multiple sources with your target audiences on the devices of their preferences and then analyze if and how that content resonates.

This user guide explains all the sections and operations in Docurated that you have access to as a non-administrator user (non-admin) and as an administrator user (admin user). The guide aims to help you understand the processes to search, extract, curate, present, and analyze different types of content in Docurated.

Wherever a feature or option is specific to an admin user, the title of the section is suffixed with [Admin] or [Admin Only] based on whether the same feature/option is available to a non-admin user or not. If you are a non-admin user, you can skip these sections.

This user guide is a supplement and must be read in conjunction while using Docurated.
About Quark Docurated

Quark Docurated (or Docurated) enables you to manage your organizational content from one place and have better control over its life cycle. Docurated uses machine learning-based search algorithms to identify and suggest content results and helps you analyze content usage and engagement.

With Docurated, you get the following content management and intelligence capabilities:

- **Content Aggregation**: Store content centrally and integrate existing repositories (such as SalesForce, Marketo, Google, SharePoint, and so on) in one place.

- **Google-like Search Engine**: Locate information easily with a Google-like search capability.

- **File Formats Support**: Store and share all types of file formats - Docs, PDFs, PPTs, videos (with transcripts), and more.

- **AI-powered Insights**: Deliver personalized, recommended content to your desired audiences.

- **Performance Analytics**: Track and analyze content usage and engagement to optimize content experiences and make smarter content investments.

- **Mobile App**: Access documents on mobile devices (Android and iOS) with the ability to read documents in offline mode.
Any changes to any of your organization’s content repositories (file name update, deletion, addition, and so on) automatically reflect on Docurated in real time.
Log in to the Product

To be able to log in and access Docurated, you either must have the Docurated purchased or you must have a Docurated license for your Quark Publishing Platform NextGen server.

To log in to your Docurated server:

1. Enter the URL of a Docurated server in a browser (for example, https://<<SERVER-URL>>/login) to open the login page.

2. Enter your username and password and then select Login.

   ➤ Select the checkbox Remember Me to remain logged-in in the current browser for 60 days.

   ➤ You can reset your password through the Forgot Password link at the bottom of the login form.

   ➤ Docurated also displays error prompts for incorrect email, password, and TFA (two-factor authentication) code. For example, the error prompt for incorrect email is as follows:
Single Sign-On

Docurated allows single sign-on if your organization supports it. Single sign-on means logging in to your Docurated server with your organization's email only and without a password.

To log in through single sign-on:

1. Select the link **Single Sign-On** at the bottom of the login form.
2. Enter your email.
3. Select **Login**.
Two-Factor Authentication

Quark Docrated also allows two-factor authentication on login.

To enable two-factor authentication:

1. After you are logged in, select the profile icon/picture to expand the profile menu.

2. In the profile menu, select **Account Overview**.

3. On the **Account Overview** page, select the button **Update Your Information**.

4. In the **Update Your Information** dialog:
   1. Select the **Enable Two-Factor Authentication** checkbox to open a QR code.
   2. Scan the QR code from the device through which you want to do two-factor authentication.
   3. Enter your password in the **Password** field.
   4. Enter the TFA code you have received on your device in the **TFA Code** field.
   5. Select the button **Update**.
On the Login screen, Docurated displays the input field for the TFA code only when a user has enabled the two-factor authentication mechanism.
Home

Once you are logged in, you see the homepage of your Docurated server. There are several menus, lists, and options that you can directly access from the homepage.

Some menus are on the header and remain fixed across all the pages and are not exclusive to the homepage. These header items are as follows:

- **Navigation Tabs**: Navigation tabs on the header are optional and are not available by default in Docurated.
An admin can customize and manage navigation tabs at the organization, team, and user levels to allow respective users quick access to certain types of documents. For more information see the section Profile Menu [Admin] >> Manage Navigation.

- **Profile Menu**: The profile menu appears when you select the profile icon/picture at the upper right corner of the page and displays several settings related to profile, account, content, and user interface.

Admin users have more options in their profile menu. More information is available in the sections Profile Menu and Profile Menu [Admin].

- **Notifications**: The notifications menu opens when you select the bell icon next to the profile icon/picture to display any notifications that you might have.

- **Left Pane**: The left pane contains tabs for all the key features that Docurated offers to allow you to manage your organizational content.
Some left pane tabs are only accessible to Admin users. These admin-only tabs are not visible to non-admin users.

The homepage lists and operations are as follows:

- **Search Tool**: A search tool with quick and advanced search functionalities.
- **Featured Lists**: Several featured lists for quick access documents based on your requirements.
  - **Featured**: Displays the important documents that an administrator sets as featured on the top of the homepage for everyone to have quick access.
  - **Popular**: Displays the most frequently viewed documents that the Docurated server regularly updates based on a machine learning algorithm. The **See All** link at the upper-left corner of the section is another way to access the page/left pane tab *Popular*. 
- **New & Updated**: Displays the documents that have been recently added or updated on the server.

- **Recently Viewed**: Displays the documents that you have viewed recently. The **See All** link at the upper-left corner of the section is another way to access the page/left pane tab **Recently Viewed**.

### Profile Menu
For a non-admin user, the profile menu has the following options:

- **Account Overview**: Displays generic account information such as your username, email, options to update your information and email signature, and some organizational information.
- **My Profile Settings**: Allows you to see and manage (based on organizational settings) the teams, departments, and business operations you are a part of for a better user experience while browsing for documents.

- **Metadata Dashboard**: Allows you to see all the documents whose metadata has been updated for a given time period and for a given platform. You can also refresh the results to see the latest changes, export a CSV file of the results with only key parameters or with all parameters.

- **Sync Topic Mapping**: The Metadata Dashboard also contains a Sync Topic Mapping section, which displays automatic assignment of documents with certain values of certain parameters to a certain topic. The section also has an option to create a new Sync Topic Mapping.
- **Manage Spotlights**: Allows you to add and manage featured documents. You can also filter the results of featured documents by teams/user groups.

  To see how to add a document to the spotlight (add as a featured document), see the section **Documents > Documents Actions > Kebab Menu Actions > Add to Spotlight**.

- **Switch to Classic View**: Allows you to switch to the older user interface of the Docurated application.

- **Help**: Displays any FAQs or other web page that contains general information about your Docurated server. Admin can manage the link of the Help page through the Organization Settings (described in the section below: **Profile Menu [Admin]**).

- **Logout**: Logs you out of your Docurated server.
Profile Menu [Admin]

For an admin user, the profile menu has the following additional options:

- **Manage Organization Settings**: Allows you to manage several organization-wide settings related to document sharing, passwords, email notifications, links for the Help page and privacy policy, homepage banner design, and email template.
### Manage Site Theme

- **Manage Site Theme**: Allows you to choose from the color themes available on the Docurated server and to design your custom theme.
Manage Navigation: Allows you to manage the navigation bar items and sub-items of your Docurated server.

Recycle Bin: Allows you to view the recently deleted documents (which you can filter based on the source) and the option to restore them.
Manage User and Groups: Allows you to manage users, user groups, teams, and their attributes.

Manage User Profiles: Allows you to manage the attributes that a user (admin or non-admin) can view or manage through the My Profile Settings tab in the Profile Menu.
You can:

- Define and add an attribute through the button **New Profile Attribute**.

- Edit or delete an attribute through the attribute listing actions.

  The dialog to edit an attribute is the same as the dialog to add an attribute.

- **Storage Management**: Displays the storage consumption status, storage consumption by file format type and by versions of an asset, and allows you to manage the storage by removing unused files.
Manage Navigation

Navigation menu in Docurated consists of the following elements:

- **Main Navigation Items**
- **Categories**
- **Topics**
- **Columns**

The **Manage Navigation** tab allows you to create, delete, and modify navigation menus and their elements. The tab displays the list of already available navigation menus with the options to edit and delete against each listing, and the option to create a new navigation menu.
To create a new navigation menu:

1. Select the button **New Menu** to open an input text bar.

2. In the text bar, enter the name of your navigation menu.

3. Select the right button ✅.

To edit a navigation menu:

1. Select the Edit button next to the listing of the navigation menu that you want to edit.

2. Make the following selections on the edit navigation page:
   
   1. Set the navigation menu default for yourself or for the entire organization.
2 Select the departments for which you want to make the navigation menu default.

3 Add and manage navigation items.

3 Select the button **Save**.

---

**Add and Manage Navigation Items and Sub-items**

The button **Add a Top-level Navigation Item** allows you to create a new navigation menu item and then further allows you to create and manage the categories, columns, and topics within the navigation menu item. The processes are as follows:

To create a navigation menu item:

1 Select the button **Add a Top-level Navigation Item**.

2 In the menu bar, select the edit button to rename the menu.
3 Select the button **Save**.

To add a category or topic:

1 Select the + icon in the card below the navigation menu item name to open a pop-up.
In the pop-up, select:

1. **Select Add Topic** to open the **Find or Create Topic** dialog.
   1. In the **Find or Create Topic** dialog, select the icon to select from already available topics.
   2. To create a new topic, enter a name. If Docurated cannot find the topic with that name, the Find or Create Topic dialog displays an option to **create a new topic** to add under the navigation menu item.

2. **Select Add Category** to open the **Find or Create Category** dialog.
   1. In the **Find or Create Category** dialog, select the icon to select from already available categories or select the link **Create & Add New**
Category to create a new category to add under the navigation menu item.

2 Add an optional summary (for other admin users and not for the user interface), add a sub-category, and add a topic within the current category.

3 Select the button Submit.

To add a column, select the button Add Column next to the topic/category card.

You can remove a navigation menu item, topic, category, or column through the cross icon next to their respective cards.
Manage Users and Groups

The Manage Users and Groups tab allows you to add and manage users, their groups, teams, and their attributes. The tab displays separate lists to manage users and to manage teams and attributes.

The Manage Users section displays users along with the following information:

- User Name
- Email
- BCC Email (email of an admin who gets notified about a user's activities)
- Privileges
- Groups (teams)

Additionally, you can perform the following actions:

- Add a new user
- Export user report (download a list of users with key associated information)
- Create bulk users (upload a CSV file that contains a list of users from your local machine to a Docurated server)
- Search a user by name or email
- Filter user lists by status (active/inactive and admin privileges)
- Edit a user through the icon (the process is the same as adding a user)
- Send a new password to the user through the icon ✨
- Deactivate a user through the icon ✗

The **Manage Teams and Attributes** section displays teams along with the following information:

- Team Name
- Number of Active Users/ Total Users
- Source

Additionally, you can perform the following actions:

- Add a new team
- Search a team by name or source
- Edit a team through the icon ✏️
- Delete a team through the icon ✗

**Add a User**

To add a new user:
1 Select the button + **Add New User** to open the **Add New User** dialog.
2 In the Add New User dialog, enter the following information:
   1 First Name and Last Name
   2 Email
   3 Delivery Email (if Email does not have an inbox)
   4 BCC Emails
3 Select the admin privileges check boxes.
   You can configure Docurated to automatically set certain admin privileges for all users. Docurated displays the for checkboxes admin privileges set at the organization level as disabled.
4 Add teams through the icon ☰ to include the user in various teams.
5 Select the button **Submit**.
Add a Team

To add a new team:

1. Select the button + Add Team to open the Add Team dialog.

2. In the Add Team dialog, enter the following details:
   1. Team Name
   2. Add Team Members through the icon

3. Select whether the team is a Sales or a Marketing team.

4. Select the button Submit.

Storage Management

The Storage Management page displays storage consumption classification on the following basis:

- File format types
- All the versions of assets

You can perform the following actions on the Storage Management page:

- Search for a file by name and its author
- Filter the list of assets on the right side by file type by selecting a file format in the left pane
- Upgrade your storage (by contacting Docurated support)
Delete files or their specific versions to manage your storage. The process is as follows:

1. Select the delete icon next to a listed asset or select multiple assets and then select the delete icon next to the search bar to open the **Permanently Delete** dialog.

2. In the **Permanently Delete** dialog, select one of the following options:
   - Versions older than the last N versions
   - Versions older than N years
   - All previous versions
   - Files and all their previous versions

3. Select the button **Yes**.
The Storage Management feature also triggers on-screen alerts for the lack of available space on the Storage Management page, as well as within the Profile Menu.

Recycle Bin

The Recycle Bin page displays the list of assets that have been deleted recently by different users on Docurated.

You can perform the following actions on the Recycle Bin page:

- **Empty Recycle Bin**: Allows you to clear up the storage space by permanently deleting all the recently deleted files.

- **Settings**: Allows you to set the maximum number of days deleted files can remain in Recycle Bin, after which Docurated permanently deletes the files.

- **Filter by Source**: Allows you to filter the list of deleted assets by the source repository such as SharePoint, DropBox, Salesforce, and so on.
- **Search by Name**: Allows you to search for a deleted file by file name or source repository.

- **Restore**: The icon next to a listed asset allows you to restore the asset. You cannot restore the assets that were deleted on a synced source. For such assets, the option to restore is also disabled in Recycle Bin.

- **Permanently Delete**: The icon next to a listed asset allows you to permanently delete the asset right away.

**Search Tool**

The search tool allows you to search for a document by name and a number of other parameters, which are described ahead.
When you scroll down, the search tool shifts to the header bar to always allow you quick access to the tool.

Quick Search

A quick search or keyword search is when you enter a search query (filename, author, or phrase) related to a document in the search bar to find the document.

To do a quick search:

1. Enter a search query in the search bar.
2. Select the button Find or press the key Enter on your keyboard.
3. Docurated opens the Search Results page to display the results for the search query.

The Search Results page displays the results under the following two category tabs:

- **Documents**: Displays the list of documents related to the search query.
- **Pages**: Displays the list of all the pages within documents that contain text related to the search query.
Search Results Page Operations

The **Search Results** page has the following operations to customize the listed search results:

- **Sort Options**: Allows you to sort the search results by relevance, name, views, rating, and so on.

- **View options**: Allows you to switch between snippet view and grid view for the listed search results.

Filters

The **Search Results** page also has several filters in the left pane, whose numbers vary based on the attributes defined for all the documents in the search results. This means that for two different search queries and their respective search results, the list of filters may vary.

The following images display two sets of filters for two different search queries:
There are six default filters that always appear under the Filters pane irrespective of the search query. These default filters are as follows:

- **People**: Allows you to filter the search results by users. You can see the complete list of users through the link **More**, which appears when you expand the People filter. You can see the complete list of items in other filters in the same manner.
- **Dates**: Allows you to filter the search results by day, and custom and fixed time ranges (weeks, months, quarters, and years).

- **Source**: Allows you to filter search results by the source repository; for example, Box, SharePoint, Website, SalesForce, and so on.

- **File Type**: Allows you to filter search results by file formats; for example, PDF, Spreadsheet, PowerPoint, and so on.
- **Teams**: Allows you to filter search results by teams within your organization.
- **Topics**: Allows you to filter search results by topics.

  The default filters are customizable. Additionally, you can also add a new set of filters pertaining to a specific source. For more information, see the Docurated System Administrator Guide.

### Save Filters

Docurated also allows you to save the filters you have selected to remain selected for your future search queries. To save filters:

1. Select the filters you want to save for your search queries.
2. Select the link **Save Filters** at the upper-left corner of the Filters pane.

   ![Save Filters](image)

   - The **Search Results** page also displays the selected filters as tags above the search results. You can remove the selected filters from there.

   You can also remove saved filters through the same link, which becomes **Clear Saved Filter** once you have saved filters. Additionally, there is one more operation related to filters - **Expand all/ Collapse all**, which allows you to expand and collapse the list items in all the listed filters.
Advanced Search

The Advanced Search allows you to narrow down from the homepage itself through the filters available on the Search Results page and some additional filters.

To search documents through the Advanced Search:

1. Select the sliding bar icon within the search bar on the homepage to open the Advanced Search pane.
In the **Advanced Search** pane, narrow down your search with the available filters. Some of these filters are unique to **Advanced Search**, and some are the same that are available on the **Search Results** page.

![Advanced Search pane](image)

3. Select the button **Search** at the top of the **Advanced Search** pane.

   Docurated automatically saves the filters that you select in the **Advanced Search** pane. You can remove the selection through the **Clear All** link next to the **Search** button.

   ![Advanced Search pane](image)

**Quick Help**

The **Quick Help** menu describes the best search practices. You can invoke the **Quick Help** menu through the encircled question mark icon 🕵️‍♀️ within the search bar.
Search Best Practices

**THE KEYWORD MODIFIERS**

Use keyword modifiers to find results more closely related to the type of content you need to find.

**QUOTES**

If you're searching for a specific phrase, put that phrase in quotes. That way, your search results will only return those specific words in that order.

**AND**

If you would like to search for content that includes two terms, you can separate those terms with the ampersand word “AND”. However, you don’t have to use “AND” – if you enter two terms, the search engine will assume there is an AND between them.

**EXAMPLES:**

- “sales team”
- “search best practices”
- “Coca-Cola ERP Fail”
- sales AND pricing
- “sales pricing” AND “sales teams”
- “Auto Sales Pricing”
Clipboard [Admin Only]

The Clipboard page/pane lists all the pages, images, charts, and other components of a document that you copy to the clipboard.

The Clipboard pane allows you to:

- Share only the required components within large documents instead of complete files.
- Use similar components from different documents to create a separate asset that addresses a specific need. For example, create and share a document that contains only upgrade procedures of three software that your organization offers instead of separate system admin guides for all three products.

In addition to clipped items, the Clipboard pane also displays several actions related to clipped items and options related to the pane. These actions and options are as follows:

- **Share**: The Share button provides several ways to share the clipped items, which are as follows:
  - Open the clipped items in the Presenter mode and share them as a presentation.
- Share the clipped items via a link or email.
- Create a file from the clipped items and then share the file via email.

The option (permission) to Share and Download assets are configurable across the Docurated portal based on the user. If you do not see these options as described in this user guide, this means your system administrator has disabled these options for you.

- **Export**: The Export button allows you to save a copy of the clipped items on your local machine. You can export the clipped items as a PDF or a PowerPoint presentation.

- **Save**: Allows you to create a file from the clipped items, which Docurated automatically saves on your server. While saving the clipped items as a file, the name field also allows you to select an already available document if you want to save the clipped items as a new version of the document.

- **Empty**: The button allows you to remove all the items you have clipped and empties the clipboard.

- **Expand/Collapse**: Expands or collapses the Clipboard pane.

- **Close**: Closes the Clipboard pane.
Topics

Docurated allows you to add tags to documents to curate and categorize documents as topics. You can use topics to filter document results or can search for a document within a topic instead of the entire repository.

You can access the Topics page through the tag icon or the Topics tab in the expanded left menu pane.

The Topics page lists all the topics defined within an organization, which you can sort by name, date, and number of documents in a topic. You can also search for a topic (or filter results) by name.

Additionally, the Topics page displays a list of recommended topics along with the thumbnails of the documents as a slider/web carousel at the top of the page. You can directly access the recommended topics through the button View Topic and follow the topic through the RSS icon button on a topic’s card.
Topic Card

A topic card contains the following information:

- Topic Thumbnail (if you do not apply an image, Docurated displays the initials of the collection name as the topic thumbnail)
- Topic name
- Name of the user who created the topic
- Date and time of the creation
- A snippet of the topic description
- The number of files in a topic
- The option to recommend the topic
- The option to follow the topic

Add a New Topic

To add a new topic:
1 Select the button + New Topic on the Topics page to open the Add New Topic dialog.

2 In the Add New Topic dialog, add a topic name (such as AI), summary, and categories (such as the name of a product in your organization).

Docurated allows you to add a new category while you create a new topic through the link Create & Add New Category next to the field Categories.

3 Select the button Submit.

Additionally, you can perform the following actions through the Add New Topic dialog:

- Add a thumbnail image for the topic through the options to upload files at the top of the dialog.
Mark the topic as recommended or as internal through their respective checkboxes at the bottom of the dialog.

Upload and apply a thumbnail image to the topic.
When you mark a document as internal, Docurated adds a ribbon (with “Internal” text on it) on the topic’s thumbnail in the listing. By default, an internal document does not have an option to share; however, you can configure the settings if you want to share internal documents with an external audience. For more information, see the Docurated Administrator Guide.

Add a New Category

The process to add a new category is similar to adding a new topic. To add a new category:

1. Select the link **Create & Add New Category** in the **Add New Topic** dialog to open the **Add New Category** dialog.
In the **Add New Category** dialog, add a category name, summary, and topics.

You can add a new topic while creating a new category, in the same manner, you can create a category while creating a topic.

3. Select the button **Submit**.

**Topic Actions**

You can perform the following actions on the listed topics:
- **Mark as recommended:** You can mark a topic recommended through the thumbs up icon on the topic listing.

- **Follow a topic:** You can follow a topic through the RSS icon on the topic listing.

You can access the following actions through the kebab menu on the topic listing:

- **Edit:** Allows you to edit a topic, in the same manner, you add a new topic.

- **Edit Markup:** Allows you to edit the user interface of the landing page of the topic.

- **Manage Access:** Allows you to define access for the users and user groups in your organization to the topic.

- **Delete:** Allows you to delete a topic.

Docurated also displays all these actions on a topic's landing page when you open a topic to view.

**View a Topic**

You can view a topic by clicking a topic’s card in the listing. A topic landing page has the following elements:

- Topic name and preferences tags (for example, if you have marked a topic as recommended or as internal).

- Icons for topic actions (Edit, Edit Markup, Manage Access, and Delete).

- Sorting and viewing options for the documents listed in a topic. You can sort the documents in a topic, in the same manner, you sort search results, i.e., by relevance, name, views, rating, and so on.
- Filter options for the documents listed in a topic. You can expand the filters through the icon ≡, left to the topic name. These filters are the same as the filters on the Search Results page.

- List of documents in the current topic.

- The options to pin a document or mark as favorite, which appear on mouse hover.

You can perform several operations through the options in the listed documents’ cards, which are discussed ahead in the section Document Actions.

**Edit a Topic**

To edit a topic:

1. To open the **Edit Topic** dialog, do one of the following:
   1. Select **Edit** from the kebab menu actions on the topic listing page, or
2. Select the edit icon on a topic's page.

2. In the **Edit Topic** dialog, make the changes you want to edit; for example, change the topic name, thumbnail, summary, categories, or preferences.
3 Select the button **Submit**.

**Edit Markup**

The Edit Markup action allows you to design the markup of a topic's landing page. You can use HTML5 Markup language to make the changes you want. To edit markup:

1 To open the **Edit Markup** wizard, do one of the following:
   
   1 Select **Edit Markup** from the kebab menu actions on the topic listing page, or
   
   2 Select the markup icon on a topic's page.

2 In the Edit Markup wizard, apply the markup design you want for a topic's landing page.
3 Select the button **Save**.

**Manage Access to Topic**

The **Manage Access** action allows you to manage access to a topic for different users. To manage access to a topic:

1 To open the **Manage Access** dialog, do one of the following:
   1 Select **Manage Access** from the kebab menu actions on the topic listing page, or
   2 Select the lock icon on a topic's page.
In the **Manage Access** dialog, add/remove a user to/from whom you want to grant/revoke access to a topic. You can also choose to send an email alert with a custom message to the new users you have added to a topic.

1. To add a user, select the add icon to open the list of users in your organization and select a user.
2. To remove a user, select the cross icon against an added user or user group.
3. Select the button **Submit**.
**Collections**

Docurated allows you to create personalized libraries of documents through collections. These collections are separate from topics, which are defined at an organizational level.

You can access the Collections page through the file folder icon or the Collections tab in the expanded left menu pane.

The Collections page lists two types of collections - the collections that you have created under the tab My Collections and the collections that are shared with you under the tab Shared with Me, which you can sort by name, date, and the number of documents in a collection. You can also search for a collection (or filter results) by name or the owner.

---

**Collection Card**

A collection card contains the following information:

- Collection thumbnail (if you do not apply an image, Docurated displays the initials of the collection name as the collection thumbnail)
- Collection name
- Name of the user who created a collection
- Date and time of the creation
- The number of files in the collection
Add a New Collection

To add a new collection:

1. Select the button + New Collection on the Collections page to open the Add New Collection dialog.

2. In the Add New Collection dialog, add a name, and description, and apply a thumbnail image to the collection.

3. Select the button Submit.

Collection Actions

Docurated allows you to perform several actions on the collections that you have created or have access to. Generally, you can perform only a fraction of actions on the collections that are shared with you in comparison to the actions you can perform on the collection you have created.

For example, the actions for a collection you have created are (in the same order as in the screenshot):
- **Print Request**: Allows you to order the physical copies of the documents within a collection.

- **Download**: Allows you to download a zip of the collection at your local machine.

- **Edit**: Allows you to edit a collection, in the same manner, you add a new collection.

- **Edit Markup**: Allows you to edit the user interface of the landing page of a collection.

  You can edit markup of a collection, in the same manner, you edit markup for a topic. For more information, see the section Topics > *Edit Markup*.

- **Share**: Allows you to share a collection via sharing a link or via email.

- **Show Presenter**: Allows you to open the documents within a collection in the presentation mode.

- **Manage Access**: Allows you to define access for the users and user groups in your organization to the collection.

  You can manage access to a collection you have created in the same manner you manage access to a topic you have created. For more information, see the section Topics > *Manage Access*.

- **Duplicate**: Allows you to create a copy of a collection, in the same manner, you add a new collection.

- **Delete**: Allows you to delete a collection.

- **Reorder Items**: Allows you to manually reorder the items of a collection.

- **Sorting Options**: Allows you to sort items in a collection by age (Newest First/Oldest First) and name (A-Z/Z-A).
- **View Options**: Allows you to switch the view between card and thumbnail.

The actions for a collection shared with you are:

- Print Request
- Duplicate

You can customize collection actions. For more information, see the Docurated Administrator Guide.

You can invoke collection actions through the kebab menu icon next to a collection listing.
Docurated also displays all these actions on a collection's landing page when you open a collection to view.
Some key collection actions are as follows:

**Print Request**

To order the physical copies of the documents within a collection:

1. In the kebab context menu, select **Print Request** (or select the **Print Request** icon on a collection’s landing page) to open the **Shopping Cart Summary** dialog.

2. Select the documents and quantity of each document that you want to order.
> By default, the **Shopping Cart Summary** dialog selects one quantity of each of the document in collection you want to order.

3 Select the button **Checkout** to open the **Review Order** dialog.

4 In the **Review Order** dialog, enter an address, choose a shipping option, and shipping date, and then select the button **Confirm Order** to open the **Print Request Order** dialog.
5 In the **Print Request Order** dialog, add/remove the users you want to notify about the order, and then select the button **Place Order**.

**Share**

To share documents within a collection:

1 In the kebab context menu, select **Share** (or select the **Share** icon on a collection’s landing page) to open the **Sharing** dialog.
In the dialog **Sharing**:

1. To share the collection via a link, select **Link**.
   1. To create a link, select the dropdown menu at left-bottom corner of the dialog.
   2. If you want to create an app-specific link, select the app or else select the option **Generic Link**.

3. Select the button **Generate Link**.

4. Select/unselect the following checkbox options:
   1. **Automatic Updates**: Enables updates to collection and its items to reflect automatically whenever a recipient uses the link to access the collection.
   2. **Receive Notification**: Enables notifications whenever a user uses the link to open the collection document.
   3. **Allow Downloads**: Allows users to download a copy of collection documents on their local machines.
   4. **Expiration Date**: Sets an expiration date to the generated link, beyond which a user cannot access a collection with the link.
   5. **Request Email**: Sets a constraint that a user is required to provide email to access the collection via link.
   6. **Require Password**: Allows you to generate and assign a password to access the collection you are sharing.
5. Docurated generates and displays the link with the options to copy the link with/without the title of the collection.

2. To share the collection via email, select **Email**.
   1. Enter the emails of the recipients, BCC a recipient, enter a subject to the email, and a message.
   2. Select/unselect the following checkbox options:
      1. **Receive Notification**
2 Expiration Date

3 Allow Downloads

3 Select the button **Send** to send the email.

---

**Show Presenter**

To open a collection document in the presentation mode:

1 In the kebab context menu, select **Show Presenter** (or select the **Show Presenter** icon on a collection's landing page) to open the **Presenter** page.
2 In the **Presenter** page, select the file you want to view in the presentation mode.

3 Docurated opens the file in presentation mode, through which you can view/present the file like a PowerPoint presentation.

**Presenter Mode Options**

The following options are available on the presenter mode screen:
1 **Back**: Takes you back to the Presenter page where all the documents in the current collection are listed.

2 **Documents**: Opens a list of documents in the current collection in a pane to quickly allow you to present any other document in presenter mode.

3 **Show/Hide Thumbnails**: Allows you to display/hide the thumbnails of the pages/slides of the document along with the document’s timeline.
4 Audio: Allows you to manage volume if there is an audio file embedded within the document.

5 Full Screen/Exit Full Screen: Allows you to go or exit Full-Screen mode.

6 Back/Forward: Allows you to go back to the previous document or go ahead to the next document in the current collection.

7 Live Sharing Link: Allows you to share the document via a link or via email, and also provides a link to the link-sharing settings.
8 **Notifications**: Displays the notifications for actions that you have enabled for the document in the link-sharing settings.

9 **Settings**: Allows you to manage the presenter settings such as allowing downloads and requiring email while sharing, and notification settings for the actions performed on a document that has been shared.
View a Collection

You can view a collection by clicking a collection card in the listing. A collection landing page has the following elements:

- Collection name.
- Icons for available collection actions.
- Filter options for the documents listed in a collection. You can expand the filters through the icon 🔄, left to the collection name. These filters are the same as the filters on the Search Results page.
- The options to reorder and change the view of the listed documents.
- List of documents in the current collection.
Collection Update Notification

A collection owner receives a notification email on a daily basis for any updates made to the documents in that collection. The notification email lists all the documents that have been updated in the last 24 hours. Additionally, the email also lists the documents that have expired within the last 24 hours.

Currently, Docurated does not list the expired documents only in the notification email. Meaning, when no content updates have been made in any document of a collection, the notification email does not list anything even if any document has expired in that collection.
Documents

The Documents page lists all the documents on the server you have access. You can filter the documents through the filter pane on the left. These filters are the same as the filters on the Search Results page. You can also sort the documents by relevance, name, views, rating, and so on, and switch the view between grid and snippet views.

Document Card

A document card in the document results contains the following information:

- Document thumbnail (which is the first page/slide/sheet of the document)
- Document name
- File type
- Number of pages/slides in a document
- Date and time of the creation
- Name of the topic a document is a part of
- Document rating (an aggregate of all the versions of a document)
- Number of views (an aggregate of all the versions of a document)
- Number of shares (an aggregate of all the versions of a document)
- Number of downloads (an aggregate of all the versions of a document)
Document Actions

Docurated allows you to perform several actions on a document. Some actions you perform right on the document card and some actions you can perform through the kebab menu at the upper right corner of a document card.

Document Card Actions

You can perform the following actions from within a document card, which appear when you hover the cursor over the document card:

- Select a document (select several documents) to add to a collection or a topic
- Mark a document as your favorite

- Rate a document (hover over the star rating to expand the dialog with the option to rate the document)
When you select the Rate this document link, Docurated opens the rating tab in Preview mode, from where you can select a rating for the document.

- Preview a document within the Documents page (select the arrow icon below the document card to expand to the preview mode)
- Preview a document in the Preview popup (click on a document card to open the Preview popup window)
● View the transcript if the document is a video file through the icon 🔊.

**Preview Mode**

The Preview mode is similar to the presenter mode but with several additional information items and functions, which are as follows:
1. (Icon [ ] ) Hides/displays page/slide thumbnails at the left-hand side of the Preview mode screen.

2. (Icon [ ] ) Switches to the grid view to display all the thumbnails of the pages/slides in a document in a grid.

3. (Icon [ ] ) Opens the presenter mode within the preview mode.
4 (Icon [ ]) Opens the presenter mode in a new browser tab.

5 (Icon [ ]) Displays the Properties pane on the right-hand side of the Preview mode screen. The Properties pane contains the activity count for the current version of the document, the aggregate activity count for all the versions of the document, and the information related to the topic, title, and owner of the document.

6 (Icon [ ]) Displays the number of views for each section of the document.
The section analytics are available only for the documents in the iDoc format.

7 (Icon 🌟) Displays the rating details of the document and also lets you rate the document.

8 (Icon ⌛️) Lists the other versions of the document.
9 (The button **Open**) Allows you to open the document in a native application or download it to a local machine, based on configuration.

10 (The button **Share**) Allows you to share a document via a link or via email. The process is the same as described in the section Collections > Collection Actions > **Share**.

The **Open** and **Share** buttons are configurable based on your requirement. For example, you can replace the **Open** button with a **Download** button based on your users’ expectations, or add a separate button for **Download**, and so on. For more information, contact Docurated Support.
(Kebab icon) Expands the remaining document actions of the kebab menu.

Closed captions [for video files with transcript only]: Allows you to hide/display and manage the captions’ font size, color, style, and position (through the option caption settings).

Kebab Menu Actions

The kebab menu displays the following actions:

- **Open**: Allows you to download a document on your local machine.
- **Share**: Allows you to share a document via a link or via email. The process is the same as described in the section Collections > Collection Actions > Share.

- **Show Presenter**: Opens the document in the Presenter mode in a new browser tab.

- **Topics**: Allows you to view and manage the topics of a document.

- **Collections**: Allows you to view and manage the collections of a document.

- **Favorite**: Marks a document as a favorite.

- **Add to Spotlight**: Allows you to add a document as a featured document on the homepage.

- **Edit Metadata**: Allows you to view and edit a document’s meta information.

Some of the key kebab menu actions are as follows:

**Manage Topics**

To view manage topics of a document:

1. In the kebab context menu, select **Topics** to open the dialog to manage topics.

2. In the dialog:
   1. To add a document to a new topic, select the plus icon to expand the list of available topics and then select a topic.
2  To remove the document from a topic, select the cross against a listed topic.

3  Select the button Submit.

Manage Collections
To view manage collections of a document:

1  In the kebab context menu, select Collections to open the dialog to manage collections.

2  In the dialog:

   1  To add a document to a new collection, select the plus icon to expand the list of available collections and then select a collection.
To remove the document from a collection, select the cross against a listed collection.

3 Select the button **Submit**.

**Add to Spotlight**

To add a document as a featured document (add to spotlight):

1 In the kebab context menu, select **Add to Spotlight** to open the Add to Spotlight dialog.

2 In the **Add to Spotlight** dialog, provide the following information:
   1 A description for the document listing as a featured document.
   2 Select whom (users and groups) you want to see the document as a featured document.
Select the button **Submit**.

When you add a document to the spotlight through **Manage Spotlight** option in the **Profile Menu**, you also have to provide the link to the document in the **Add to Spotlight/New Spotlight** dialog. You can generate the link via the option **Share** context menu option of a document.

**Edit Metadata**

To edit the metadata of a document:

1. In the kebab context menu, select **Edit Metadata** to open the **Update Document Metadata** dialog.

2. In the **Update Document Metadata** dialog, update any of the following field values:
   1. Title
   2. Description
   3. Expiration Date
   4. Intended Use (Public or Private)
   5. Content Type (Brochure, Press Release, Report, and so on)
3 Select the button **Submit**.

**Document Actions [Admin]**

If you are an admin user, you can perform the following additional actions on a document through the kebab menu:
- **Copy to Clipboard**: Allows you to copy all the pages/slides in the document to the clipboard.

- **Manage Access**: Allows you to add or remove users to the list of users who can access the document. You can also choose to email a user you have just provided access to a document.

- **Edit Poster Image**: Allows you to update the thumbnail image of the listed document from your local machine.
- **Delete**: Deletes a document after you select **OK** in the confirmation dialog.

- **Transcript** [for video files only]: Allows you to generate a transcript based on the audio in a video file.

By default, Docurated generates the transcripts for a maximum duration of 60 minutes in a video. This is configurable. For more information, connect.
with Docurated Support. Additionally, Docurated takes 3 to 4 minutes to generate the transcript for a video.

Additionally, as an admin user, you can perform the following additional actions in the preview mode:

- Extract individual elements on a page to directly copy to the clipboard through the icon 📋.

- The additional kebab menu actions as described above in this section.

- Copy individual slides/pages to clipboard. This option appears in the upper-right corner of your screen when you double-click on a slide/page to view it as an image.
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**Favorites**

The **Favorites** page lists all the documents that you have marked as favorites on your Docurated server. The layout of the **Favorites** page and options within are the same as on the **Documents page**, except that on the **Favorites** page, the filter pane is not available.
Recently Viewed

The **Recently Viewed** page lists all the documents that you have recently opened on your Docurated server. The layout of the **Recently Viewed** page and options within are the same as on the **Favorites** page, and does not have the filter pane.
The **Popular** page lists the documents with the most number of views, shares, downloads, and likes (marked as favorites). The layout of the **Favorites** page and options within are the same as on the **Documents page** (document filters are available).
Presenter

The **Presenter** page displays the presenter and marketing analysis in their respective tabs. Both types of analytics are available for a maximum of 30 days.

**Presenter Analytics**

The **Presenter Analytics** tab displays the analytics related to a document or a collection you have shared. You can narrow down analytics results through the following filters:

- **Asset Type**: Document or collection
- **Time Frame**: Past 24 hours, 7 days, 15 days, 30 days, or a custom date range
- **User Groups**: User groups classified in your organization based on privileges
- **Users**: The user(s) who shared documents/collections
The **Presenter Analytics** tab displays the following information:

- **Views**: The total number of views on all the listed documents/collections.
- **Recipients**: The total number of unique recipients of all the listed documents/collections.
- **Document/Collection Shared**: The total number of unique shares of all the listed documents/collections.
- **Document/Collection Viewed**: The total number of unique views on all the listed documents/collections.
- **Downloads**: The total number of times the listed documents/collections have been downloaded.
- **Time**: The total time spent by users on the listed documents/collections.
Below the analytics statistics, based on your selections, the **Presenter Analytics** tab lists all the instances when a document/collection was shared with a unique recipient.

Additionally, the **Presenter Analytics** tab also provides options to share, present, and update a document/collection as well as displays the following additional information for the listed documents/collections:

- **Recipient**: Email address of the recipient of the document.
- **Campaign**: Name of the campaign the document is a part of.
- **Date of Creation**
- **Viewed Percentage**: The percentage of the document viewed by the recipient(s).
- **Sender**: The user who shared the document.
Section Analytics

Under Presenter Analytics, you can also view the section analytics of a document if available (given the document is in iDoc format and has at least one section). To access section analytics of a document, select the document name in the listed results and Docurated opens section-level statistics (activity and duration).

Additional Actions

You can perform the following additional actions on the presenter analytics results:
• **Group by File**: Allows you to merge all the listed instances of a file when the file was opened by different users. When you double-click on a listed file with merged instances, Docrated opens a new page to list all the instances of the file.

• **Show Unopened**: Allows you to filter the list to display only the instances of a file when a recipient did not open the file.

• **Export**: Allows you to download a report of the **Presenter Analytics** on your local machine in the CSV format.
- **Shared Link**: Allows you to see the analytics for a particular file you shared via Link.

**Marketing Analytics [Admin]**

The **Marketing Analytics** tab displays the analytics related to the campaigns and platforms your Docurated server is integrated with. You can narrow down analytics results through the following filters:

- **Time Frame**: Past 24 hours, 7 days, 15 days, 30 days, or a custom date range
- **Campaign(s)**
- **Platforms(s)**
- **Sender(s)**
- **Recipient(s)**
The **Marketing Analytics** tab displays the following information:

- **Views**: The total number of views on all the listed documents.
- **Recipients**: The total number of unique recipients of all the listed documents.
- **Downloads**: The total number of times the listed documents have been downloaded.
- **Time**: The total time spent by a user on the listed documents.

**Marketing Analytics** data is accessible only to a user with marketing administrator privileges, which is assigned by the system administrator of your Docurated server.
Analytics [Admin Only]

The Analytics page lists in-depth analytics related to the documents and users of your organization in the form of interactive charts, statistics, and reports. These analytics are classified as follows:

- Content
- Team Reports
- Content Engagement
- Revenue
- Others (relevant reports that cannot be classified under other analytics)

Content

The Content analytics contain statistics about the documents and related activities. The Content analytics are categorized as follows:

- Inventory
- Audit
- Duplicate documents

Inventory

The Inventory tab contains the information related to content count and displays the following statistics:
- **Content Graph**: Content Graph is a combination of a line and an area graph. The line graph displays the total number of available documents on your Docurated server at a point of time/duration. The area graph displays the change in the number of documents at a point of time/duration.

- **Content Count**: A pie-chart that displays the current count of the total documents available on your Docurated server classified by documents’ age (added within the last 30 days, 90 days, and older).

- **Content Uploaded By**: A stacked bar chart that displays the number of documents uploaded by users, which are further classified by the content type a user uploaded.

- **Content Type**: A horizontal column chart that displays the number of documents by content type.

All these graphs are interactive and display the exact amount for a bar or node when you hover the cursor over it.

You can narrow down the inventory statistics through the following filters:
• **Date Uploaded**: Allows you to see the statistics for a particular duration. You can select the duration by days, weeks, months, quarters, and years.

• **Content Type**: Allows you to see the inventory statistics of the documents of specific content type(s).

• **Uploaded By**: Allows you to see the inventory statistics of the documents that specific user(s) uploaded.

• **Upload Source**: Allows you to see the inventory statistics of the documents imported from specific source(s).

**Audit**

The **Audit** tab contains the information related to the status of the documents. Generally, a document can have one of three statuses - **Keep** (approved and published), **Review** (under review), and **Unpublished**.

The Audit analytics displays the following statistics:
- **Content Upload by Date**: A stacked bar chart that displays the count of documents by every quarter, which are categorized by status.

- **Uploaded by**: A horizontal stacked column chart that displays the count of documents by the users who uploaded them, which are categorized by status.

- **Content Name**: List of all the documents with related information such as content type, recommended to (status), days since uploaded, days since last viewed, and days since last used. You can also sort the list by name and values of other column values.

You can narrow down the content audit statistics through the following filters:

- **Date Uploaded**: Allows you to see the quarterly audit statistics for a particular duration.

- **Uploaded By**: Allows you to see the audit statistics of the documents that particular user(s) uploaded.
• **Content Type:** Allows you to see the audit statistics of the documents of certain content type(s).

• **Recommended To:** Allows you to see the audit statistics by document status(es).

### Duplicate Documents

The **Duplicate Documents** tab contains the analytics related to duplicate content count and displays the following statistics:

- **Duplicates Detected:** The total number of duplicate documents that your Docurated server has detected.

- **Duplicates by Source:** A bar chart that displays the number of duplicate documents by source.

- **Duplicate Documents:** A list of duplicate documents with additional information such as location, user, date of creation/insertion, and source.

You can narrow down the audit statistics through the following filters:

- **Date Uploaded:** Allows you to see the duplicate documents detected in a particular duration. You can select the duration by minutes, hours, days, weeks, months, quarters, and years.

- **Content Type:** Allows you to see the duplicate documents detected for certain content type(s).
• **Upload Source**: Allows you to see the duplicate documents detected for certain source(s).

**Team Reports**

The **Team Reports** analytics contain statistics about the interaction of users and teams with your Docurated server. The **Team Reports** analytics are categorized as follows:

• Adoption
• Activity
• Search
• Audit

**Adoption**

The **Adoption** tab contains the information related to the frequency of usage of your Docurated server and displays the following statistics:

• **Active Users**: An area graph that displays the number of weekly active users on your Docurated server for the selected duration.

• **User Count**: A pie chart total number of active users categorized by how recently they were active (last 30 days or 90 days).

• **User Status**: A list of users with the indications how recently they were active (last 30 days or 90 days).

• **Active Users per Group**: A bar chart that displays the number of active users by teams.

You can narrow down the adoption statistics through the following filters:
- **Date**: Allows you to see the weekly active users for a particular duration.
- **Group**: Allows you to see active users for specific teams.

### Activity

The **Activity** tab contains the information related to the user activities and their interaction with documents and displays the following statistics:

- **Number of Activities**: The total number of searches made on your Docurated server, views on documents, number of times documents were opened, downloads, shares, and clip views.

- **Number of Activities by Month**: A stacked bar graph that displays the number of activities by month, which are categorized by the type of activities.

- **Activity by User**: A horizontally stacked bar graph that displays the number of activities by users, which are categorized by the type of activities.

- **Activity by Content**: A horizontally stacked bar graph that displays the number of activities by documents, which are categorized by the type of activities.

- **Activity by Group**: A horizontally stacked bar graph that displays the number of activities by teams/groups, which are categorized by the type of activities.

You can narrow down the activity statistics through the following filters:
Date: Allows you to see the activities for a particular duration.

Group: Allows you to see the activities of specific team(s).

User: Allows you to see the activities of specific user(s).

Content Type: Allows you to see the activities for specific content type(s).

Activity: Allows you to see the statistics related to specific activities.

Search

The Search tab contains the information related to searches made on your Docurated server and displays the following statistics:

- Frequently searched queries: A keyword mosaic displaying different searches made on your Docurated server. The larger the font size of a search query, the more frequently the search query has been used.

- Search terms list: List of search queries that you can sort by name and popularity along with the number of times a search query has been used and the number of results it produced.

- Search term breakdown: A bar chart that displays the breakdown of the selected search query - when, how many times, and by whom the search query was made.

You can narrow down the search statistics through the following filters:
Date: Allows you to see the searches for a particular duration.

Group: Allows you to see the searches made by specific team(s).

User: Allows you to see the searches made by specific user(s).

Audit

The **Audit** tab contains the information related to the performance of documents (number of shares, number of views, and content score) based on users and teams. The **Audit** tab displays the following statistics:

- **Group**: A list of teams in your organization from which you can select a team to see their related document performance.
- **User**: A list of users in the selected team from which you can select a user to see the user’s related document performance.
- **Content**: A list of documents that the selected user has interacted with along with performance metrics - number of shares, number of views, and content score based on these values and other factors.

You can narrow down the team audit statistics through the following filters:
Date: Allows you to see the performance metrics for a user in a particular duration.

Content Type: Allows you to see the performance metrics for a user for specific content type(s).

Content Engagement

The Content Engagement analytics contain statistics about the user interaction with the documents on your Docurated server. The Content Engagement analytics are categorized as follows:

- Internal Views
- Shares
- External Views

Internal Views

The Internal Views tab contains the information related to the number of times the documents on your Docurated server have been viewed within your organization and displays the following statistics:
Monthly View Statistics: The monthly statistics for the total number of views, viewers, and views per person on your Docurated server documents.

Views by Content: A list that displays the total number of views, viewers, and views per person for all documents on your Docurated server.

Views by Group: A horizontal bar chart that displays the total number of views by different teams within your organization.

You can narrow down the internal view statistics through the following filters:

- Date: Allows you to see the internal views for a specific duration.
- Group: Allows you to see the internal views of specific teams.
- Topic: Allows you to see the internal views for documents within a topic.

Shares

The Shares tab contains the information related to the number of times documents on your Docurated server have been shared and displays the following statistics:
- **Monthly Share Statistics**: The monthly statistics for the total number of shares, users, and shares per person on your Docurated server documents.

- **Shares by Delivery Option**: A pie-chart that displays the total number of shares categorized by the delivery channel.

- **Shares by Content**: A list that displays the total number of shares, users, and shares per person for all documents on your Docurated server.

- **Shares by Group**: A horizontal bar chart that displays the total number of shares by different teams within your organization.

You can narrow down the share statistics through the following filters:

- **Date**: Allows you to see the shares for a specific duration.

- **Group**: Allows you to see the shares of specific teams.

- **Topic**: Allows you to see the shares for a document within a topic.

**External Views**

The **External Views** tab contains the information related to the number of times the documents on your Docurated server have been viewed from people outside your organization and displays the following statistics:
- **Engagement**: A stacked bar chart that displays the monthly statistics of the total number of shares and external views.

- **Engagement by Sender**: A horizontal stacked bar chart that displays the total number of shares by a user and the number of external views received on those shares.

- **Engagement by Content**: A horizontal stacked bar chart that displays the total number of times a document has been shared and the number of external views received on those shares.

You can narrow down the external view statistics through the following filters:

- **Date**: Allows you to see the engagement statistics for a specific duration.

- **User**: Allows you to see the engagement statistics for specific users.

- **Content Type**: Allows you to see the engagement statistics for specific content types.

- **Topic**: Allows you to see the engagement statistics for documents within a topic.

**Revenue**

The **Revenue** analytics contain statistics about the sales deals and revenue generated under a single tab **Outcome**:
Outcome

The **Outcome** tab information related to the opportunities, deals, and revenue generated, and displays the following statistics:

- **User Opportunities**: The number of products/services by the prospects in the sales funnel.
- **Creator Revenue**: The amount of revenue generated by the prospects in the sales funnel.
- **Sales Funnel**: The amount of revenue, classified by active and closed deals.
- **Revenue by Close Date**: The amount of revenue generated by each quarter.
- **Content Revenue**: Estimated amount of revenue generated by documents (that were shared with prospects).
- **Group Revenue**: Revenue generated by the organization whose prospects are in the sales funnel.

You can narrow down the revenue statistics through the following filters:

- **Close Date**: Allows you to see the revenue statistics for a specific duration.
- **Group**: Allows you to see the revenue statistics of specific teams.
Others

The **Others** analytics contain un-categorized statistics and any custom analytics that you want to set up for your Docurated server. Some key other analytics are as follows:

**Content Activity**

The **Content Activity** tab lets you see the statistics related to the activities (views and shares) performed on a document. You can find the document you want to see content activity statistics for through the following filters:

- Source
- Team
- Performer (user)
- Topic
- Date (date range, which you can select by dragging the date nodes both ways)

You can see the following statistics for the selected document:

- Number of activities and activity types performed by different users
- A timeline of the activities performed on the document by different users

**Top Performing Files**

This is source-specific analytics (such as SalesForce) that let you see the top-performing files of that source and analyze the performance at every stage of the purchase life-cycle. You can narrow down your search through the following filters:
- Deal Stage (a stage in the purchase life-cycle as defined on SalesForce)
- Industry
- Topic
- Team
- Date (date range)

You can see the following key statistics for the documents:
- Events and events count by stages
- Attribution by stages
- Status of a lead by stages

**Processing**

The **Processing** tab displays the statistics related to the file imports from different sources and of different formats. You can see the following statistics:

- The number of files of different formats imported from each source (a list and a stacked bar chart)
- Recently uploaded files with their status and related information such as date of creation, last modified date, the number of attempts to upload, and so on.
Presenter Activity

The **Presenter Activity** tab lets you see the statistics related to the activities (views and shares) performed on a document in the Presenter mode. You can find the document you want to see the presenter activity statistics for through the following filters:

- **Document Owner**
- **Date** (date range, which you can select by dragging the date nodes both ways)

You can see the following statistics for the selected document:

- **Number of activities and activity types performed by different users**
- **A timeline of the activities performed on the document by different users**
Collection Actions

The Collection Actions tab displays the activities for all the collections on your Docurated server in the form of a Mekko chart. You can apply one of the following filters to narrow down the results:

- Action Performed by
- Team
- Action
- Date

When you select a collection, the Breakdown section displays the activity statistics by different users for the collection:
Analytics Actions

Docurated provides the following actions to help you view, analyze, and share important statistics in a hassle-free way:

- **Undo**: Allows you to undo your last filter selection or a selection you made on any of the interactive graphs within an analytics tab.
- **Redo**: Allows you to redo your last filter selection or a selection you did on any of the interactive graphs within an analytics tab and then undid.
- **Revert**: Allows you to return to the previous state of filter and chart selections.
- **Refresh**: Allows you to refresh the statistics to reflect the most recent changes that might have taken place after you opened the current analytics page.
- **Pause**: Allows you to pause a filtered search or refresh to retain the current state of analytics.
- **View**: Allows you to manage the default view for an analytic. For example, set the default view with certain filters applied. You can manage the views through the **Custom View** dialog.

- **Share**: Allows you to share the current analytics statistics via a link with other admin users who already have access to that analytics.

- **Download**: Allows you to download the current analytics in a CSV file.

- **Full Screen**: Allows you to view the analytics in the full-screen mode.
Add Content [Admin Only]

The **Add Content** page allows you (an admin user) to upload or import a document from your local file or another server to your Docurated server.

There are three ways to import a file to your Docurated server, which are as follows:

- Upload from your local machine through drag-and-drop or through the upload button. You can also choose to keep these files private through a checkbox.

- Upload from the web using file URL.

- Import from third-party servers that are synced with your Docurated server.

Additionally, you can upload HTML files through the button **Upload Interactive Docs** and upload PowerPoint templates in the same manner as you upload any other document file.
Sync with Third-party Servers

The process to integrate your Docurated server with some third-party servers (such as Dropbox, Box, Google Drive, and Salesforce) is the same. For other servers (Marketo and Quark Publishing Platform) the process differs. These processes are as follows:

**Box, Dropbox, Google Drive, or Salesforce**

To integrate Box (or Dropbox, or Google Drive, or SalesForce) with your Docurated server:

1. On the **Add Content** page, select **Box** from the list of repositories in the right pane, which opens a dialog that asks you to log in to your Box account.

2. Select the button **Login to Box to Configure your Account** to open the Box login page.
3 Enter your credentials and then select the button **Authenticate** to open the **Box and Quark Docurated Sync Preferences** page.

4 On the **Box and Quark Docurated Sync Preferences** page, select the files you want to sync and then select the button **Save**.

**Configure your Box and Docurated Sync Preferences**

**What file types should we include?**
- Sync All File Types

[Images of file types: Documents, Powerpoints, Spreadsheets, PDFs, Keynote, Video, Images]

**SAVE**

**Marketo**

To integrate Marketo with your Docurated server:

1 Select **Marketo** from the list of repositories in the right pane. This opens a form to synchronize Marketo with Docurated.
In the form, provide the following information:

1. **Name**: The name of your Docurated server.
2. **Instance URL**: Your organization-specific Marketo URL.
3. **Client Id**: The Client Id of the web service created for Docurated in Marketo.
4. **Client Secret**: The secret key to the web service created for Docurated in Marketo.
5. **Create Automatic Leads**: When checked, allows automatic creation of Marketo leads on your Docurated server.

Select the button **Submit**.

**Quark Publishing Platform**

To integrate your Quark Publishing Platform (Quark Publishing Platform NextGen) server with your Docurated server:

1. Select **Quark Publishing Platform** from the list of repositories in the right pane. This opens a form to configure your Quark Publishing Platform server for Docurated.

2. In the Quark Publishing Platform server configuration form, provide the following information:
   1. **Repository ID**: A unique repository ID of your Quark Publishing Platform server that Quark provides.
2 **Host URL**: The URL of your Quark Publishing Platform Server.

3 **JWT Token**: A unique authentication token key that you receive from Quark Support team.

4 **Types**: The file formats that you want to import from your Quark Publishing Platform server to your Docurated server. For example, Docx, PDF, Excel, PNG, PPT, and so on.

5 **Collection to Sync**: The Quark Publishing Platform server collections that you want to synchronize with your Docurated server.

6 **Interactive Doc Attribute Name** (optional): The name of the attribute you have defined on your Quark Publishing Platform server for interactive doc (.zip of HTML) files.

7 **Hardcoded Permission** (optional): Any access permission that you want to enforce on the imported data. By default, the permissions that you have set for your Quark Publishing Platform Server are mapped as they are to your Docurated server.

8 **Last modified meta key** (optional): The name of the attribute you have defined on your Quark Publishing Platform server to track the last modified date and time of assets.

9 **Custom Attributes to Sync** (optional): Any Quark Publishing Platform Server-specific attributes that you want to map to the Docurated server.

10 **Description Attribute Name** (optional): The name of the attribute you have defined on your Quark Publishing Platform server to contain a description of an asset.

11 **Concurrency Factor**: The maximum number of files that you want to process at once.

12 **Global Sync User Email**: Email address of the super/system admin of your Quark Publishing Platform Server.

You can synchronize several Quark Publishing Platform servers with your Docurated server at once.
You can also define queries to map specific data from your Quark Publishing Platform server to your Docurated server. To define a query, provide the following information:

1. **Key**: A high-level attribute such as *content type*.

2. **Value**: A value or a set of values for the Key that you have defined. For example, for the Key *content type*, the values can be an *image*, *PDF*, and so on.

3. **Condition Type**: Any condition that you want to define based on the Key and Value you have defined. For example, import documents “where *content type* is not an *image*.”
4 Query Result Set: The maximum number of results you want to get for a query.

- A query overrides the default mapping settings.

4 Additionally, you can define that crawling mechanism through the following checkboxes:

1 Disable Group Crawl: When checked, stops mapping

2 Disable Reverse Crawl: When checked, stops mapping the changes that make to a document on the Docurated server.

3 Disable Checkpoint Crawl: When checked, stops mapping the last updated status of documents.

5 Select the button Submit.

Docurated Desktop Application

To set up and synchronize the Docurated desktop app, you first need to download the app from your Docurated web application server. All these processes are defined ahead in the section Desktop Application Set-up.
Desktop App [Admin Only]

Quark Docurated client app is a lightweight desktop application, which you can install on your on-site content repositories. Docurated client app (or Docurated desktop application) crawls folders and documents on your local content repositories, indexes their underlying information set (such as dates, privileges, and so on), and then imports the data to your Docurated server.

The Docurated desktop application allows you to manage and share your content with any or all team members.

➔ By default, the content that the Docurated desktop application indexes is private to you unless you choose to share it.

The Docurated desktop application provides the following capabilities:

- Allows you to select the part or repository that you want the application to crawl and index, and define the date ranges.
- Indexes and extracts relevant metadata from the underlying information set.
- Scans the underlying permissions model and passes the information to the Docurated server. The Docurated desktop application automatically maps your active directory permission structure.
- Maintains a pointer from Docurated Server to the underlying file path to enable you to open any document in the native application. For example, to open a PDF in Adobe Acrobat Reader.
- Runs in the background and continuously checks for changes in the content structure.

Setup

Installation

To install the Docurated desktop application:

1. On the Add Content page, select Docurated Client App from the list of repositories in the right pane to download the installer.
Run the installer and then on the installer dialog, select the button **Install**.

Once installation is complete, the login dialog (**Docurated Setup**) of the Docurated desktop application opens.

**Login**

To login to the Docurated desktop application:

1. In the **Docurated Setup** dialog, enter your credentials.
2 Select the button **Sign In**.

**Single Sign-on**

Docurated desktop application allows single sign-on (given that your organization supports single sign-on) through an authentication code.

You must be logged in to your Docurated server (web application) to be able to single sign-on to the Docurated desktop application.

To log in through single sign-on:

1 Select the button **Single Sign-on** to open a browser page with an activation code (which is a webpage from your Docurated server).
Enter the code in the Docurated Setup dialog and then select the button Submit.

Synchronization

After you are logged in to the Docurated desktop app, you can synchronize local directories through the following steps:
1. In the Docurated desktop app, select **Folders** to open the dialog **Folder Selection**.

2. In the **Folder Selection** dialog, select the directory/sub-directory on your local machine that you want to synchronize with the Docurated desktop app and then select the button **Update**.
Additionally, you can choose to synchronize specific file formats within the synchronized directory through the **Advanced Options** button at the bottom of the Docurated desktop app window. You can also synchronize files based on their creation and last modified date.

![Advanced Options](image)

**Uninstall the Desktop App**

To uninstall the desktop app:

1. On your local machine, search “Uninstall Docurated” in the system search bar.
2 Select the item for **Uninstall Docurated** wizard.

3 Follow the instruction in the **Docurated Uninstall** wizard to proceed with the process and then select the button **Close** once the process is complete.
Service App [Admin Only]

The function of the service application is the same as the desktop application; however, unlike the desktop application the service application is always up and running (even after you have closed the window) and does not have a user interface that allows you to synchronize or desynchronize your local machine files/directories from within the app window.

Installation and Setup

To install and setup the Docurated service application:

1. Get the link to download the Docurated service application from Quark Docurated support for your Docurated server.

2. Double-click on the installer file to open the **Docurated Setup** dialog.

3. In the **Docurated Setup** dialog, select the button **Get Code**, which opens a browser window that contains a four-digit code.
4 Enter the code in the field and then select the button **Activate Now**.

5 On the next screen of the **Docurated Setup** dialog, select the file formats that you want to synchronize, add a date constraint (if required), select the button **Browse** to synchronize a directory/folder from your local machine with your Docurated server, and then select the button **Install**.
You can select the checkbox **Use LDAPS** (Lightweight Directory Access Protocol) to enhance the security of your directories/files through encrypted synchronization.

If you want to share a synchronized local directory with another user in your organization, you first have to share your local directory with the user and then add the shared location path in the **Browse** dialog.

6 The next screen displays a confirmation message for service application installation. Select the button **Finish** to close the **Docurated Setup** dialog.
After you have installed and set up the Docurated service application, you can see the documents and folders on the local directory that you have synchronized in the Docurated web application (Docurated server).

To see the synchronized local directory on your Docurated server:

1. Select the **Documents** tab from the left pane.

2. In the filters, select **Source > Desktop sync** to see the files and folders within the synchronized local directory.
To change the synchronization preferences after you have closed the Docurated Setup window:

1. On your local machine, search “Docurated Preferences” in the system search bar.

2. Select the item for Docurated Preferences wizard.

3. In the Docurated Preferences dialog, update your preferences.
Uninstall the Service App

The process to uninstall the Docurated service app is the same as to uninstall the Docurated desktop app. For more information, see the section *Uninstall the Desktop App*. 

![Docurated Preferences dialog box showing file types to upload, date ranges to sync, folders to sync, and LDAP settings.](image)
Mobile App

The Docurated mobile app is available on both the major mobile operating systems - iOS and Android. You can install the Docurated mobile app, in the same manner, you install any other app on your mobile device (iOS or Android).

After you have installed the Docurated mobile app, you can log in to the app in the same manner as you log in on the web application (including single sign-on and setting up two-factor authentication).

The Docurated mobile app looks and functions in the same manner as the Docurated web application, except for the following two differences:

- The mobile app does not have any admin-only sections and features, meaning, that admin profile menu options, Clipboard, Analytics, Add Content tabs, and other admin actions are not available.

- The mobile app has an offline mode.

Offline Mode

The Offline mode allows you to view documents and collections on your Docurated server even when you are not connected to an internet connection. You can access the offline mode through the left pane to see the collections and documents available and then navigate into a collection to find a document to view in the presenter mode.
You can only view a document in offline mode but cannot present the document to others. Additionally, the offline mode also offers a **Sync** button that allows you to synchronize your offline documents and collections with the latest versions available on your Docurated server whenever you go online in the mobile app.

To make a document/collection available for offline viewing:

1. Navigate to the collection/document on your Docurated mobile app.
2. Select the kebab menu and then select the slide button **Available Offline**.
You can make all the documents marked as Favorite available for offline viewing at once.
Third-party Applications Integration

Salesforce

The Docurated plugin for Salesforce allows you (sales professionals) to find and use the content you need irrespective of the location it is stored. Docurated integrates with your organization’s repositories (Dropbox, Box, SharePoint, Google Drive, and so on) and provides you with the best content throughout the sales life cycle. The Docurated plugin for Salesforce also allows you to create new slides from the approved sales and marketing collateral, all from within Salesforce user interface.

- To access Docurated through Salesforce, you must have a valid Quark Publishing Platform NextGen license if you are already using Quark Publishing Platform NextGen. For more information see Quark Publishing Platform NextGen User Guide or contact Docurated Support.

- Docurated automatically assigns group(s)/team(s) to new users based on their Salesforce profile based on the profile match available in Docurated database. When no match is found for Salesforce profile, Docurated displays the message that no profile match is found and user must contact the system administrator for profile setup on Docurated.

User Interface Features

Quark Docurated plugin appears as a top navigation tab in your Salesforce web application, through which you can access your Docurated server from within the Salesforce user interface.
For Admin Users: You can use your organization’s name or logo in the Quark Docurated tab. For more information, see the section below Setup > Add a Custom Tab.

Additionally, Quark Docurated is configurable with the Salesforce objects Accounts, Contacts, Leads, and Opportunities, and allows you to make documents available through a custom lightning tab (named Quark in the screenshot below) for the prospects and clients listed under these objects.

For Admin Users: For more information on how to configure a Quark Docurated lightning tab for Salesforce objects, see the section Salesforce > Setup > Add Custom Lightning Tabs for Salesforce Objects.
Salesforce Object Custom Lightning Tabs

The custom lightning tab of your Docurated plugin is similar across all configurable Salesforce objects (Accounts, Contacts, Leads, and Opportunities) and contains the following paginated sub-tabs:

- **Playbook**: Lists the sales playbooks/user manuals, which are internally recommended to the sales team for a contact or a lead. These playbooks guide you on how to engage contacts and leads based on where they are in the purchase cycle.

  ![Playbook Sub-Tab](image)

  The **Playbook** sub-tab is only available for **Contacts** and **Leads**.

- **Recommended**: Lists the documents that Docurated’s AI-system recommends for a lead/account/contact/opportunity. You can make a recommended document available for a lead/account/contact/opportunity by attaching the document to that lead/account/contact/opportunity.
- **Content Shared**: Lists the documents that you have shared with or attached manually to a lead/account/contact/opportunity.

- **Content Analytics**: Displays the content engagement analytics for the documents that you have shared with a lead/account/contact/opportunity.
Activity Log

You can also check all the activities performed by a salesperson, a Lead, or an Opportunity on the content you shared through the custom lightning tab Activity.

The logged activities are as follows:

- Opening a document
- Engaging with the content of a document
- Sharing a document
- **Attaching a document** (to a prospect)
Attach a Document

Quark Docurated plugin for Salesforce allows you to attach a document to a lead/account/contact/opportunity listed under the respective Salesforce objects. This means, to make a document available for a specific prospect/client/organization listed under one of these Salesforce objects.

To attach a document:
1. In your Docurated server under the Quark Docurated tab, navigate to the document that you want to attach.

2. Expand the kebab menu on the document’s card and then select **Attach** to open the dialog **Attach To**.

3. In the **Attach To** dialog, select the object (for example, Lead) you want to attach the document to.

4. Add the names of the leads for whom you want to make the document available.
Select the button Attach.

Copy Salesforce Link

Quark Docurated plugin for Salesforce allows you to share a document, topic, or category within your organization by sharing a native Salesforce link.

To share a document, topic, or category directly via a Salesforce link:

1. Expand the kebab menu on the document card.
2. Select Copy Salesforce Link.
3. Share the link directly with a client/prospect through any of the established means of communication.
Installation [Admin Only]

To install the Docurated plugin for Salesforce:

1. Log in to your Salesforce account as a Salesforce administrative user.

2. After you are logged in, in the left pane, under **Platform Tools**, select **Apps > AppExchange Marketplace** to open the **AppExchange Home** dialog.
   - You can also search for “AppExchange Marketplace” in the search bar at the top of the left pane.

3. In the **AppExchange Home** dialog, search for “Quark Docurated.”

4. Select the result to view more information about the Quark Docurated plugin and the option to install it.
5 Select the button **Get It Now**.

6 On the next screen, log in to your AppExchange account through the button **Open Login Screen**.

   ➡ If you do not have an AppExchange account, the **Login** dialog automatically uses your Salesforce credentials to log you in.

7 After you are logged in to AppExchange, the next screen asks whether you want to install the Docurated plugin on the Production environment (your
current organization environment) or on the Sandbox copy of your Production environment.

8 On the next screen (irrespective of the environment you have selected), provide your professional information (name, email, company, location, and so on), check the **terms and conditions** checkbox, and then select the button **Confirm and Install**.
On the next screen, select for whom you want to install the Docurated plugin for Salesforce (for all users, for admins only, or for specific users) and then select the button **Install**.
During the installation, you see the following screen.

If the installation takes a long time, you can move ahead to do other tasks. Salesforce alerts you about the installation completion via email.

**Setup [Admin Only]**

To set up the Docurated plugin for Salesforce, you first need to create a custom Salesforce tab for your plugin, create lightning tabs for Salesforce objects, and then do a few configurations, which are as follows:
Add a Custom Tab

To add a tab for the Docurated plugin for Salesforce:

1. On the Salesforce user interface, select the setting icon in the top bar menu items and then select Setup.

2. On the Setup user interface, in the left pane, under Platform Tools, select User Interface > Tabs.

3. On the Tabs page, in the section Visualforce Tabs, select the button New to create a new Visualforce tab.

4. On the New Visualforce Tab page (as Step 1 of the process), provide the following information and then select the button Next:
   1. Select a Visualforce page (choose Docurated).
   2. Enter the label of the tab.
   3. Enter the name of the tab (you can use your organization’s name).
   4. Select a tab style.
   5. Enter a description.
5 On the **New Visualforce Tab** page (as Step 2 of the process), choose the profiles for which you want to make the tab default, and then select the button **Next**.

6 On the **New Visualforce Tab** page (as Step 3 of the process), choose the custom apps for which you want to make the tab available, and then select the button **Save** to add the tab.
After you have created your custom tab for the Docurated plugin, you can see the tab on the Salesforce user interface for the profiles and custom apps you have made your tab available for.

Add Custom Lightning Tabs for Salesforce Objects
You can configure your custom lightning tabs (record pages) for the Salesforce objects - Accounts, Contacts, Leads, and Opportunities. You can create a custom lightning tab for a Salesforce object, in the same manner, you create a custom Salesforce tab for your Docurated plugin.

The Visualforce pages for these custom lightning tabs are as follows:
To configure and use Docurated plugin tabs, you must switch to the Salesforce Lightning user interface.

Configure Custom Lightning Tabs

To configure a custom lightning tab for Salesforce object:

1. In the left pane, under **Platform Tools**, select **User Interface > Lightning App Builder**. The **Lightning App Builder** page lists the tabs that you configure for Quark Docurated.

2. You can also search for “Lightning App Builder” in the search bar at the top of the left pane.

3. On the **Lightning App Builder** page, select the button **New** to create a new lightning page.

4. On the **Create a new lightning page** dialog, select **Record Page** and then select the button **Next**.

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<table>
<thead>
<tr>
<th>Salesforce Object</th>
<th>Visualforce page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Docurated_Embedded_Account_Next</td>
</tr>
<tr>
<td>Contacts</td>
<td>Docurated_Embedded_Contact_Next</td>
</tr>
<tr>
<td>Leads</td>
<td>Docurated_Embedded_Lead_Next</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Docurated_Embedded_Opportunity_Next</td>
</tr>
</tbody>
</table>
On the next screen, provide a label and select a Salesforce object for which you want to configure your custom lightning page, and then select the button Next. For example, for the object Accounts, you can add the label “Docurated_Account.”

On the next screen, select a template for your custom lightning page and then select the button Finish to close the Create a new lightning page dialog.

Select any of the templates under the tab Close Salesforce Default Page if you do not require to set up your custom lightning page template.
6 On the next screen (which is the setup page for your custom lightning tab), select any of the already available lightning tabs to make the tab-related options visible in the right pane, and then select the button **Add Tab**.

7 Select the tab you have added to open the dialog that lets you manage the tab label.

8 In the **Tab Label** dialog, select **Custom** from the dropdown list and then add a custom label for your lightning tab.
Under your custom tab, select the button **Add Component(s) Here**, and then select Visualforce in the left pane, which generates a view of your Docurated server within your custom lighting tab.
In the right pane, manage the following properties of your Visualforce component and then select the button **Save** to save your custom lightning tab.

1. **Label** (for example, “Docurated”)
2. **Visualforce Page Name** (Visualforce page of the object for which you want to add your custom lightning tab; for example, *Docurated_Embedded_Account_Next* for the object **Accounts**)
3. **Height** (for the best experience, the recommended height is 750 pixels)
11 After you have saved your custom lightning tab, Salesforce displays a **Page Saved** confirmation dialog that asks you to activate your page. You can either select the button **Activate** on the dialog or can select the button **Activation** at the upper right corner of the setup page.

12 The **Activation** dialog essentially asks you to review for which user you want to make your custom lightning visible. For example, if you want to make your custom tab default for your entire organization, select the button **Assign as Org Default** under the tab **Org Default**.
13 On the next screen, select a form factor (desktop, mobile, or both) on which you want to apply your preferences.

14 On the next screen, review your preferences and then select the button **Save** to make your custom lightning tab available for the selected Salesforce object.
Set Access Permission

To set the permission access to the Docurated plugin for Salesforce for the users of your organization:

1. In the left pane, under Platform Tools, select Apps > App Manager. The Lightning Experience App Manager page lists the applications integrated with Salesforce.

   - You can also search for “App Manager” in the search bar at the top of the left pane.

2. On the Lightning Experience App Manager page, select the dropdown icon against Docurated in the listed applications, and then select the button Manage to open the App Manager page.

3. On the App Manager page, select the button Edit Policies.
4 Set the field **Permitted Users** to **Admin approved users are pre-authorized** and then select the button **Save**. This is to enable the mechanism to manage user access to Docurated plugin.

5 In the left pane, under **Administration**, select **Users > Permission Sets**. The **Permission Sets** page lists the user groups based on applications integrated with Salesforce.

6 On the **Permission Sets** page, select **Docurated**.
7 On the next screen, select the button **Manage Assignments**.

8 On the next screen, you can add, edit, or remove user access to Docurated plugin.
Sync Salesforce Objects (via Quark Docurated Support)

From the Docurated support team, you can get your Docurated plugin for Salesforce synced with several Salesforce objects based on the API limits outlined by your organization. With Docurated, you can make API requests for Salesforce recommendations, playbooks, syncing Salesforce libraries, content engagement activity logging and emails.

You can have the following Salesforce objects synced and can also have a synced object customized based on your requirements from the Quark Docurated support team:

<table>
<thead>
<tr>
<th>Account</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>ChatterActivity</td>
<td>Contact</td>
</tr>
<tr>
<td>ContentDocument</td>
<td>ContentDistribution</td>
</tr>
<tr>
<td>ContentVersion</td>
<td>ContentWorkspace</td>
</tr>
<tr>
<td>ContentWorkspaceDoc</td>
<td>Document</td>
</tr>
<tr>
<td>FeedItem</td>
<td>Folder</td>
</tr>
<tr>
<td>GoogleDoc</td>
<td>Lead</td>
</tr>
<tr>
<td>Note</td>
<td>Opportunity</td>
</tr>
<tr>
<td>OpportunityContactRole</td>
<td>OpportunityFieldHistory</td>
</tr>
<tr>
<td>OpportunityHistory</td>
<td>OpportunityStage</td>
</tr>
<tr>
<td>Profile</td>
<td>User</td>
</tr>
</tbody>
</table>

You can also get a synced object removed from the Docurated support team.
Sync Salesforce Content Workspaces (via Quark Docurated Support)

You can get Salesforce libraries mapped to your Docurated server. To map data from Salesforce libraries, Quark Docurated support team requires the following information:

- The content workspace ID or the Salesforce library ID that you want to map.
- The topic that corresponds to the library to which you want to map the data.

Chrome Extension

Quark Docurated browser extension is available on Google Chrome Web Store. Docurated browser extension allows you to search, browse, and share documents within the extension window (without having to open the Docurated web application in your browser) and is a handy marketing tool (see the section Third-party Application Integration > Marketo for more information).

You can use the Docurated Chrome extension with the following third-party applications:

- Marketo
- Pardot
- Outreach
- HVS (Salesforce)

To add Docurated browser extension:

1. Go to Google Chrome Web Store.
2. Search for Quark Docurated.
3 Select the search results and then select the button **Add to Chrome**.

4 Google Chrome displays a dialog to confirm that the extension has been added.
Outlook Plugin

Quark Docurated plugin for Outlook allows you to share documents (via email) on your Docurated server from within the Outlook desktop application. You can search and navigate your Docurated server for a document from within Outlook desktop application as you do on a browser.

Additionally, the Quark Docurated plugin for Outlook offers the following capabilities:

- Makes AI-based document recommendations based on the recipients to enable you to quickly add relevant documents for the recipient without searching.
Tracks engagement analytics for the documents you have shared in your Outlook email via Docurated plugin.

- You can also see analytics for a specific document that you have shared through the checkbox **Shared**.

- Through the button **Log Activity**, you can enable Docurated plugin for Outlook to log activities (related to a document that you have shared) in your Docurated server analytics.
To share a document in Outlook through Docurated plugin:

1. In your Outlook desktop application select **New Email** and then select the Docurated add-in, which appears under the tab **Messages** on the header menu ribbon to open the Docurated plugin window.

2. Add a recipient in the **To** field of the Outlook New Email window and then search for or navigate to the document in the Docurated plugin window.
3. Select the document to expand its preview pane and then select the button **Share**.

4. On the next screen, select the button **Share Now** to add a link to the document in your email body. Alternatively, you can insert a preview of the document in the email body through the slide button **Insert Preview** and also enable recipient to download the document through the slide button **Allow Downloads**.
5 Compose your email (optional) and then select the button **Send**.

**Add Docurated Plugin**

Docurated plugin for Outlook is not available on Outlook add-in library; therefore, you first have to request the plugin file from Quark Docurated Support and save it on your local repository before you can integrate the plugin with Outlook.

To add Docurated plugin to Outlook:

1 In the header menu ribbon of your Outlook desktop application, select **Get Add-ins** to open the dialog that lets you manage add-ins.
2 In the dialog, select **My add-ins > Add a custom add-in > Add from file** and then add the Docurated plugin file from your local machine.

3 Outlook prompts a warning message to inform Docurated plugin may access your private data. Select the button **Install** on the warning message dialog.
Outlook displays that your Docurated plugin has been integrated.

Marketo

Quark-Marketo integration enables marketing teams to use trackable links to Quark Docurated content in an email campaign, making Quark Docurated a single source for all the marketing and sales collateral.

Quark-Marketo integration allows you to:

- Track how prospects engage with your email campaigns and content
- Log the email/content engagement information from Docurated to Marketo

User Interface Features

You can use Quark-Marketo integration via *Quark Docurated Chrome extension*. With the Marketo platform opened in a window of the Chrome browser, you can generate Marketo-specific links in the Docurated-Chrome extension window and use the links to send out as a part of your Marketo email campaigns.
Generate Context-specific Links

To generate context-specific (Marketo, in this case) document links:

1. With the Marketo platform opened in a window of the Chrome browser, in the Docurated-Chrome extension window, navigate to the document for which you want to generate a Marketo-specific link, expand the kebab menu for that document, and then select **Share**.
2 In the **Share** dialog, the Chrome extension automatically detects the underlying context for Marketo. Select the button **Generate Link**.
3. Copy the generated link, which also contains the value of a set of parameters appended (values of ‘Lead E-mail’ and ‘Campaign’ included, by default).

4. Insert the generated link (with tracking parameters) as per your preferences in your email draft.
5 Expand the **Email Actions** dropdown menu, and select **Approve and Close** to set up the campaign for the launch.

**Activity Log [Admin Only]**

Quark-Marketo integration allows you to log several custom activities for the leads who engage with the Docurated content you share via a Marketo campaign. These custom activities help your marketing team to plan their lead scoring models even better.
These custom activities logged are as follows:

- **Document Open**: This activity is logged when a lead opens a shared document. The log for this activity also contains the campaign name, document name, and the ID of the lead.

- **Download Document**: This activity is logged when a lead downloads a shared document. The log for this activity also contains the document name, the ID of the lead, and the number of downloads.
- **View Duration**: This log contains the duration (in seconds) for which a lead engaged with a document and also contains the document name and the ID of the lead.

**Custom Engagement Information**

Quark-Market integration also provides the provision to log custom content engagement information based on the interaction of a lead with Docurated documents.

The following information is logged under the custom Marketo object **Content Engagement**:

- Document Name
- Document Type
- Campaign Name
- Shared URL of Document
- Actual Document URL in Quark Docurated
- View Duration in Seconds
- Number of Downloads for the document
- Recipient Email
- View Date

<table>
<thead>
<tr>
<th>Engagement Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the default configuration of Quark-Marketo integration, a custom field <strong>Engagement Score</strong> is available for every lead, which is calculated based on the engagement activities performed by a lead on Docurated documents.</td>
</tr>
</tbody>
</table>
Your marketing team can leverage this Engagement Score in conjunction with Marketo's Lead Score for better insights into each lead.

**Configuration [Admin Only]**

The process to configure Marketo for Docurated is as follows:

**Create an API User and Assign Roles**

To create an API user:

1. Log in to the Marketo admin console with administrator credentials.
2. In the left pane, go to the tab Users & Roles.
3. If the role API User is not available, create the role.
   1. In the Info tab of the Invite New User dialog, provide an Email and name and then select the button Next.
2 In the Permissions tab, select the roles and permissions necessary for an API user and then select the button Next.
4 Edit the selected role for API User and provide the following set of permission to the role.

![Edit Role](image)

5 Select the button **Save**.

> **Access to API** is a mandatory set of permission.

### Create a Web Service

A web service is required to integrate Marketo with Quark.

To create a web service:

1. In the left pane menu of the Marketo admin console, select **Integration > Launch Point** to open the **New Service** dialog.

2. In the **New Service** dialog, provide the following values in the displayed fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>QuarkRestService</td>
</tr>
</tbody>
</table>
Create Custom Activities

To accommodate custom activities from Docurated into the Marketo platform, you have to create these custom activities with the correct values.

To create these custom activities:

1. In the Marketo admin console select Admin > Custom Activity > Create.

2. Add the following new three custom activities with the following field values:
   
   1. Document Open

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Document Open</td>
</tr>
</tbody>
</table>
2  Document Download

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Document Download</td>
</tr>
<tr>
<td>API Name</td>
<td>documentDownload</td>
</tr>
</tbody>
</table>

3  Document View Duration

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Document Open</td>
</tr>
<tr>
<td>API Name</td>
<td>documentViewDuration</td>
</tr>
</tbody>
</table>
Create Custom Objects

You have to create two custom objects that address the following purposes:

- A custom object corresponding to each Docurated document that a Marketo lead engages with
- A custom object to display the engagement information by leads on Docurated documents

To create these custom objects:

1. In the Marketo admin console select Admin > Marketo Custom Object to open the Create Object dialog.

2. In the Create Object dialog, provide the following values in the displayed fields for the first object (Content Engagement) and then select the button Save:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Content Engagement</td>
</tr>
<tr>
<td>API Name</td>
<td>contentEngagement_c</td>
</tr>
<tr>
<td>Plural Name</td>
<td>Content Engagements</td>
</tr>
<tr>
<td>Description</td>
<td>Every Docurated document being engaged has a corresponding custom object in Marketo</td>
</tr>
<tr>
<td>Show in Person Detail</td>
<td>Toggle On</td>
</tr>
</tbody>
</table>
1. Create the following fields for the first custom object (Content Engagement):

<table>
<thead>
<tr>
<th>Field Name</th>
<th>API Name</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>id</td>
<td>string</td>
</tr>
<tr>
<td>Name</td>
<td>name</td>
<td>string</td>
</tr>
<tr>
<td>Type</td>
<td>type</td>
<td>string</td>
</tr>
</tbody>
</table>

2. Create the second custom object (Engagement) in the same manner and provide the following values in the displayed fields and then select the button **Save**:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Engagement</td>
</tr>
</tbody>
</table>
Create the following fields for the first custom object (Engagement):

<table>
<thead>
<tr>
<th>Field Name</th>
<th>API Name</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>id</td>
<td>link (LinkObject: Content Engagement and Field: Id)</td>
</tr>
<tr>
<td>Campaign</td>
<td>campaign</td>
<td>string</td>
</tr>
<tr>
<td>Sender Email</td>
<td>senderEmail</td>
<td>email</td>
</tr>
<tr>
<td>Document URL</td>
<td>documentURL</td>
<td>string</td>
</tr>
<tr>
<td>Share URL</td>
<td>shareURL</td>
<td>string</td>
</tr>
<tr>
<td>View Id</td>
<td>viewId</td>
<td>string</td>
</tr>
<tr>
<td>Viewer Email</td>
<td>viewerEmail</td>
<td>link (LinkObject: Person)</td>
</tr>
</tbody>
</table>
Create a Custom Field

The Engagement Score (the Docurated-native counter part of Marketo’s lead score) is a custom field, which you can create through the following process:

1. In the Marketo Admin console, select Database Management > Field Management > New Custom Field to open the New Custom Field dialog.

2. In the New Custom Field dialog provide the following values in the displayed fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Score</td>
</tr>
<tr>
<td>Name</td>
<td>Engagement Score</td>
</tr>
<tr>
<td>API Name</td>
<td>engagementScore</td>
</tr>
</tbody>
</table>
3 Select the button **Create**.

- The name of each of the APIs for each of the custom entities you create must match the value provided above.

**Pardot**

Like Marketo integration, Docurated-Pardot integration also allows you to track how prospects engage with your content and to log the content engagement information from Docurated to Pardot to produce an aggregate score for each prospect.

- Currently, some SSO-related changes and User Interface updates are being made to Pardot-Salesforce integration. We will document the updated process for Docurated-Pardot integration as soon as those changes are implemented by Pardot.
Appendices

Appendix A: Video Support Center
We have a robust video support center with tutorial videos on a range of topics:
- Basic Tutorial
- Sync Tool Installation
- Chrome Plugin
- Quark Docurated for Box
- Best Practices for Search
- Visual Content Surfacing
- Content Aggregation
- Storyboarding
- Web-Clipper

Appendix B: Admin Settings
Admin controls can be found at https://<<SERVER-URL>>/admin or by navigating to:
1. <User Name> in the top right.
2. “Admin Tools” (also known as “/admin”).
3. You can also access Admin Tools via “Manage Users & Teams” from “Profile” page.
Organization Policies – security protocols that apply to everyone in the organization.

1. “External Sharing” – Users of this organization can share items with people outside of this organization.
   
   - a. Default: Off – users cannot share outside of organization
     
     - i. Users will be unable to share documents with email addresses that have different domains as your organization.

     Example: john@example.org can share with shirley@example.org, but will be unable to share a document with billy@outsider.org

     - ii. Topics are unaffected by this policy.
2. “Strong Passwords” — Users of this organization are required to have a strong password. Strong passwords have a minimum of 8 characters and contain one number, one uppercase letter, one lowercase letter and one symbol.
   a. Default: On – users are required to create strong passwords
   b. Example: strong password: “Abcd1234!”
   c. Non-strong passwords simply have to be 8 characters.

3. “Password Resets” — Users are required to re-set their password at the interval you set.
   a. Default: Off – Users are not required to re-set their password

4. “Password Re-Use” — Users may not re-use previous passwords
   a. Default: Off – Users can re-use old passwords

5. “Admin Sharing” — Only Admin users can share content
   a. Default: Off – Any user can share content.

Admins can Add, Edit, or Remove users and teams, as well as De-activate/Re-active users, update user Admin flags and re-set a given user Password.

To add a user:

1. Click “Add User”

2. Enter the user’s first name, last name, and email address.
   a. You can set a user to be an Admin.
   b. You can add new users to teams on creation, or at any point afterwards.
   c. User can update their name during account confirmation and at any future point.
   d. User will have a secret temporary password generated and will be sent an email with an activation link for their account. When clicked, they will be taken to a confirmation page where they must update their password.
e. When an existing user shares a file with a new user, that new user will show up in the list of all users (though without a name or team affiliations), until that account is confirmed.

3. Editing a user enables an Admin to update a user’s team affiliation (and thus their permissions to certain groups of files), as well as his or her name, including Admin flag.

4. De-activating a user will disable the user’s access to Quark Docurated – If you would like to delete a user from the system completely, please contact Quark Docurated.

   a. Re-activating a user is possible from the same Admin panel.

Adding, Editing, or Removing Teams is very similar to Users

- Click “Add Team,” enter the name and members.

- Team name and membership can be edited at any time.

- Please allow time for the updates to propagate (after the dialog disappears). The time will be dependent on the number of documents and users that need to be updated.
If files are shared with a team and then team is removed, permissions that users have through that team will be removed (and thus users may lose access to that file).

Note: currently if a file is shared with a user, and then shared with a team containing that user, the user-permission is subsumed into the team permission. If the team permission is removed, this will remove all permissions for that user.

User Activity and Analytics

- The "Team report Activity" tab will show actions like shares, downloads, views etc performed by user.
- The "File Processing" tab will show statistic related to different sources and file types processed by Quark Docurated
- The "Shares" tab will show the no. of times content is shared and by how many users.
- The "Revenue Outcome" tab will display the top performing file and its related revenue.
- If Salesforce integration is enabled at your organization, the "Salesforce" tab will show analytics related to your Salesforce data.

Appendix C: Client App Integration

Overview

The processing and indexing of content stored on local hard drives and file servers require the installation of a lightweight client application. The main purpose of the client application is to monitor file systems for file additions,
deletions, and modifications and then send that data back to Quark Docurated's servers for processing and indexing. It is also advisable to install the client application on end user computers where no files are to be indexed because the secondary job of the application is to provide the conduit to enable the use of the “open button.”

The application was built to be lightweight and unobtrusive, without any noticeable impact on the performance of the computer or server. It runs on a minimal number of threads as a background process. A separate, nearly identical version is available that runs as a service for installation on servers.

Scanning – The client application can only scan folders that the installing user has access to, and only scans folders that the user selects in the user interface. Additionally, the user may select file-types and a time period from which files should be scanned (e.g. files modified since January 1, 1970).

Administration – All end users are able to scan any local folders on their computers. Only users that have granted the ability to do so can scan shared drive folders. Due to the generally large size of shared drives, it is advisable to scan them from client applications installed to run as a service on a server.

Bandwidth – Currently there is no native bandwidth throttling built into the client application. However, after the initial indexing of drives/folders, the client transmitting data relevant to files that have been modified in a given moment (which is relatively little), so bandwidth consumption on ongoing basis is generally not a concern. The initial indexing bandwidth consumption is relative to the size of the drives/folders being indexed, and while it has not caused an issue for clients, there is nothing wrong with starting the process during a period of lighter use.

Communication Protocol – The client application communicates with the Quark Docurated servers over HTTPS. As such, it requires the standard Port 443 to be open (which it should be in most networks). All data and important communications are securely encrypted in transmission.

API-Keys – A user’s API keys that allow the client application to communicate securely with the server are stored in the Quark Docurated database and securely on the user’s local machine. Locally the keys are stored in Mac OS X’s “Keychain” and Windows’s “Registry.” For security purposes, a user’s keys can be disabled on the server-side in the event that they are compromised or a user should no longer have API access to Quark Docurated.

Installation Requirements — When installing the client application the following system rights are necessary:

- Mac – Users do not have to be admins to install. If the user is not an admin, it will install the application to the user’s application folder instead of the system application folder.
Windows – Users must have the ability to install applications (often set as a policy by IT for Windows machines), though they do not need to be an admin. If users cannot install applications, an admin will need to install it and may make use of batch installation (see below).

Server – When the application runs as a service, the installing user must be an admin. The user need only have read access to the shared drive that the application is pointed at.

It is advisable, though not required, that the application be installed on a server running a physically mounted shared drive. The client application is fully capable of accessing files stored a shared drive connected to another server, but doing so has speed and network implications. All processing and communication done by the client application would be done over the internal network, consuming internal bandwidth, and often greatly slowing down the time it takes to index a drive.

### Windows

<table>
<thead>
<tr>
<th>Operating System</th>
<th>System Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows XP</td>
<td></td>
</tr>
<tr>
<td>Windows Vista</td>
<td></td>
</tr>
<tr>
<td>Windows 7</td>
<td></td>
</tr>
<tr>
<td>Windows 8</td>
<td></td>
</tr>
<tr>
<td>CPU</td>
<td>1 CPU, 1.0 GHz (recommended)</td>
</tr>
<tr>
<td>Memory</td>
<td>2 GB (recommended)</td>
</tr>
<tr>
<td>Disk Storage</td>
<td>100 MB</td>
</tr>
</tbody>
</table>

### Mac

<table>
<thead>
<tr>
<th>Operating System</th>
<th>System Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS X 10.6</td>
<td></td>
</tr>
<tr>
<td>OS X 10.7</td>
<td></td>
</tr>
<tr>
<td>OS X 10.8</td>
<td></td>
</tr>
<tr>
<td>OS X 10.9</td>
<td></td>
</tr>
<tr>
<td>OS X 10.10</td>
<td></td>
</tr>
<tr>
<td>CPU</td>
<td>1 CPU, 1.0 GHz (recommended)</td>
</tr>
</tbody>
</table>
If client server is not listed above, it is possible for the client application to access the content from a separate computer that is able to mount the drives. In such cases, it is advisable to set up a dedicated machine that can always be on, awake, and dedicated to monitoring the drive's file system.

**Proxy Connection Setup**

Please use the option supplied by your IT department to configure Proxy setting.
Proxy configuration (optional)

- No Proxy/Automatic.
- Manual – Specify PAC
  - Enter URL to your PAC file (proxy auto-config) Check with your network administrator if you need more information.
- Manual
  - Enter Server URL and port for a given proxy.
  - If log in required enter Username and Password.

Appendix D: Box Integration

Technical Integration

Quark Docurated integrates with your Box accounts by using the Box API to talk to the Box servers. There is no connection to your corporate network needed, nothing to install, and no access beyond the Box API required. The connection is established using the OAuth 2.0 protocol. This integration can be permitted or denied to any user in Quark Docurated, enabling a single user to run the integration or allowing all end users to set up their own.
Setup – Setting up the connection is simple and quick. In Quark Docurated, a user goes to the “Configure Box” page and select configure button. This redirects the user to Box.com where after they log in (using username and password or single sign-on), they will be prompted to grant Quark Docurated access to their Box account. This completes the OAuth connection.

OAuth – With OAuth, the user never has to enter their Box password in Quark Docurated. Instead, Box will send Quark Docurated a unique token that grants access to the specific Box account. Further, this access can be revoked at any time within the Box settings panel.

API Granularity – Note: The Box API does not provide for any level of granularity in requesting access to a user’s account. It is a binary option between allowing and denying access to the Quark Docurated application to the full Box account.

Configuration – After authorizing Quark Docurated, the user will be redirected back to the Quark Docurated application where they will see a simple Box configuration page that lets them choose specific Box folders and file-types they would like to sync with Quark Docurated. The user can only see and select from folders they have access to in Box (in fact, the Box API access will not allow Quark Docurated to see anything that the specific user cannot see). Only files that are in the selected folders and match the selected file-types will be scanned and indexed in Quark Docurated.

Encryption – All data transmitted from the Box servers to the Quark Docurated servers is sent via secure SSL connection.

Box Logs (“Download”) – In order for Quark Docurated to process, scan, and index files in Box, the Box API provides only one method to Quark Docurated (“Download”). This will show up in logs and reports that a customer may have set up as a “Download” of the file being processed (usually with reference to the Quark Docurated application and the user who connected their account). Particularly when doing the initial processing, this often results in a lot of notifications and emails that a given user is downloading many files. It is the best practice to preempt this flurry of activity by modifying the alert settings or notifying the Box administrator/IT of the incipient actions.

Read-Only – To ensure that a customer’s Box environment remains unaffected by the Quark Docurated integration, the Quark Docurated application is set up to interact with Box in a read-only capacity. Quark Docurated does not add, remove, or modify any files, settings, or the like in Box.

Permissions – For all files Quark Docurated indexes from Box, Quark Docurated will mirror the user access settings in Box into the Quark Docurated permissions model. Upon indexing a folder, in Quark Docurated users will only have access to the files they have access to in Box. (See Permissions Model section for more details).
Note: It possible that a user will see files from a folder that they didn’t specifically select (but have access to in Box), because another user opted to index those files and Quark Docurated mirrors the permissions/view ability from Box to Quark Docurated.

Important: Admin – Part of the Box permissions structure involves Groups (called “Teams” in Quark Docurated), which are often used in lieu of direct user permissions to grant users access to folders and files. When Quark Docurated encounters a file where access is granted to a Group, a new team of the same name will be created in Quark Docurated with all of the constituent users and the team will be permissioned to the file. However, the Box API only allows Admin users to list the users in a Group. As such, Quark Docurated can only do a true, full permissions job, that creates and properly permissions Groups, if an Admin in Box has granted Quark Docurated access via OAuth (as described above).

One of the benefits of using an Admin is that you can use that single connection to power the integration, maintaining more control over what is indexed. The admin would grant Quark Docurated access and choose which folders to index. All other end users would simply log in to Quark Docurated (never syncing Box) and see the files, which the Admin chose to index, that they have permission to access.

Alternative Setup – While it is strongly advisable and simpler to have an admin authorize Quark Docurated, one alternative is to set up a Service Account. In Box, create a new box user (e.g. “Quark Docurated -Service”), make them a collaborator on all folders that you want indexed, and make sure all users who will be using Quark Docurated are also collaborators on the appropriate folders (and not via Groups). Make the connection to Quark Docurated with the service account, and all users who are direct collaborators will have access in Quark Docurated.

Versions – The Box API alerts Quark Docurated when files are modified and thus new “versions” are created. Quark Docurated updates the index accordingly with the new versions of these documents and removes the old ones, but lists those previous versions in a version history for each space. The versioning in Quark Docurated is entirely based on when Box identifies a new version.

File Cleanup – Only files that currently appear in Box can appear in Quark Docurated. If a file is removed from a Box folder or deleted, Quark Docurated receives an API message that the file is deleted and removes it from the index. Additionally, if a user who was previously indexing a folder decides to un-select it, it will not longer be indexed going forward and all files that were in that folder will be deleted from the Quark Docurated index.
Appendix E: Google Drive Integration

Technical Integration

Quark Docurated integrates with your Google Drive account by using the Google Drive API to talk to the Google Drive servers. There is no connection to your corporate network needed, nothing to install, and no access beyond the Google Drive API required. The connection is established using the OAuth 2.0 protocol. This integration can be permitted or denied to any user in Quark Docurated, enabling a single user to run the integration or allowing all end users to set up their own.

Admin Setup – In enterprise applications you may want to programmatically access users’ data without any manual authorization on their part. In Google Apps domains, the domain administrator can grant to third party applications domain-wide access to its users’ data — this is referred as domain-wide delegation of authority. To delegate authority this way, domain administrators can use service accounts with OAuth 2.0.

The following steps are required:

1. Go to your Google Apps domain’s Admin console.
2. Select Security from the list of controls.
   a. If you don’t see Security listed, select More controls from the gray bar at the bottom of the page.
   b. Then select Security from the list of controls.
3. Select Advanced settings from the list of options.
4. Select Manage third party OAuth Client access in the Authentication section.
5. In the Client name field enter the service account’s Client ID: “863207326743-pum0q4s31gll5p2rkncfgu5nsf0hfnrs.apps.googleusercontent.com”.
6. In the One or More API Scopes field enter
   https://www.googleapis.com/auth/drive,
   https://www.googleapis.com/auth/admin.directory.group.readonly
7. Click Authorize button.
8. Make sure Google Drive admin is part of Quark Docurated and also has permissions to directory.groups.list
9. Make sure “Allow users to install Google Drive apps” is enabled under Apps > Google Apps > Drive > Settings for Drive

This sets the groundwork necessary for users to activate the Quark Docurated - Google Drive connection. In essence, it is a pre-authorization for each user that makes the connection seamless.
In addition, this will allow the administrator to activate the Quark Docurated - Google Drive connection for any or all users without those users needing to perform any steps if desired. It is a powerful way to set up the Quark Docurated environment so that it’s ready the moment users first log in.

User Setup – Setting up the connection is simple and quick. In Quark Docurated, a user goes to the “Configure Google Drive” page and selects the “Enable” button. The application matches the email address of the user in Quark Docurated to the user in the Google domain as authorized by the admin above. When a match is found, the OAuth connection is completed. It is necessary that the user in Quark Docurated is using the email address that is associated with their Google domain.

OAuth – With OAuth, the user never has to enter their Google password in Quark Docurated. Instead, Google Drive will send Quark Docurated a unique token that grants access to the specific Google Drive account. This access can be revoked at any time within the Google Drive settings panel.

API Granularity – Google provides many API scope choices that allow applications to request access grants with more granularity. Quark Docurated requests access with the following scopes:
“https://www.googleapis.com/auth/drive,”
“https://www.googleapis.com/auth/admin.directory.group.readonly.” These scopes allow Quark Docurated to access Drive files and to get a list of users to properly permission the files in Quark Docurated. Quark Docurated will not have access to any other Google enterprise products such as Gmail or calendars.

Configuration – After authorizing Quark Docurated to connect with Google Drive, Quark Docurated will show a configuration page that lets the user choose specific Google Drive folders and file-types they would like to sync with Quark Docurated. The user can only see and select from folders they have access to in Google Drive (in fact, the Google Drive API access will not allow Quark Docurated to see anything that the specific user cannot see) – this includes sections for both “My Drive” and “Shared With Me” files. Only files that are in the selected folders and match the selected file-types will be scanned and indexed in Quark Docurated.

Encryption – All data transmitted from the Google Drive servers to the Quark Docurated servers is sent via secure SSL connection.

“Download” – In order for Quark Docurated to process, scan, and index files in Google Drive, the Google Drive API provides only one method to Quark Docurated (“Download”). This will show up in logs and reports that a customer may have set up as a “Download” of the file being processed (often with reference to the Quark Docurated application and the user who connected their account).

Read-Only – To ensure that a customer’s Google Drive environment remains unaffected by the Quark Docurated integration, the Quark Docurated application
is set up to interact with Google Drive in a read-only capacity. Quark Docurated does not add, remove, or modify any files, settings, or the like in Google Drive.

Permissions – For all files Quark Docurated indexes from Google Drive, Quark Docurated will mirror the user access settings in Google Drive into the Quark Docurated permissions model (See Permissions Model section for more details). Upon indexing a folder, users will only have access in Quark Docurated to the files they have access to in Google Drive.

Note: It possible that a user will see files from a folder that they didn’t specifically select (but have access to in Google Drive), because another user opted to index those files and Quark Docurated mirrors Google Drive permissions.

Note: In Google, it is possible to have subgroups as well as circular groups. The Quark Docurated model does not allow subgroups, so subgroups are treated and created as standard groups in Quark Docurated. “Circular groups” – groups that have a subgroup that is also the parent group – are ignored in Quark Docurated.

Versions – The Google API alerts Quark Docurated when files are modified and thus new “versions” are created. This occurs for ordinary docs stored in Google Drive as well as GoogleDocs. Quark Docurated updates the index accordingly with the new versions of these documents and removes the old ones, but lists those previous versions in a version history of each space. Due to the nature of GoogleDocs with constant updating, Quark Docurated captures versions for every five minutes.

File Cleanup – Only files that currently appear in Google Drive can appear in Quark Docurated. If a file is removed from a Google Drive folder or deleted, Quark Docurated receives an API message that the file is deleted and removes it from the index. Additionally, if a user who was previously indexing a folder decides to un-select it, it will not longer be indexed going forward and all files that were in that folder will be deleted from the Quark Docurated index.

Appendix F: Dropbox Integration

Technical Integration

Quark Docurated integrates with your Dropbox account by using the Dropbox API to talk to the Dropbox servers. There is no connection to your corporate network needed, nothing to install, and no access beyond the Drop API required. The connection is established using the OAuth 2.0 protocol. This integration can be permitted or denied to any user in Quark Docurated.

Setup – Setting up the connection is simple and quick. In Quark Docurated, a user goes to the “Configure Dropbox” page and selects configure button. This redirects the user to Box.com where after they log in (using username and
password or single sign-on), they will be prompted to grant Quark Docurated access to their Dropbox account. This completes the OAuth connection.

OAuth – With OAuth, the user never has to enter their Dropbox password in Quark Docurated. Instead, Dropbox will send Quark Docurated a unique token that grants access to the specific Box account. This access can be revoked at any time from the Dropbox settings panel.

API Granularity – While the Dropbox API has various levels of granularity with lesser access scopes, only the more complete access scope that Quark Docurated requests enables the API calls and access grants needed to perform indexing of the files in Dropbox.

Configuration – After authorizing Quark Docurated, the user will be redirected back to the Quark Docurated application where they will see a Dropbox configuration page that lets them choose specific Dropbox folders and file-types they would like to sync with Quark Docurated. The user can only see and select from folders they have access to in Dropbox (in fact, the Dropbox API access will not allow Quark Docurated to see anything that the specific user cannot see). Only files that are in the selected folders and match the selected file-types will be scanned and indexed in Quark Docurated.

Encryption – All data transmitted from the Dropbox servers to the Quark Docurated servers is sent via a secure SSL connection.

“Download” – In order for Quark Docurated to process, scan, and index files in Dropbox, the Dropbox API provides only one method (“Download”) to Quark Docurated. This may show up in audit logs and reports that a customer has set up as a “Download” of the file being processed (usually with reference to the Quark Docurated application and the user who connected their account).

Read-Only – To ensure that a customer’s Dropbox environment remains unaffected by the Quark Docurated integration, the Quark Docurated application is set up to interact with Dropbox in a read-only capacity. Quark Docurated does not add, remove, or modify any files, settings, or the like in Dropbox.

Permissions – For all files Quark Docurated indexes from Dropbox, Quark Docurated will mirror the user access settings in Dropbox into the Quark Docurated permissions model (See Permissions Model section for more details). Users will only have access in Quark Docurated to the files they have access to in Dropbox.

Unlike our other integration, the Dropbox API limits the ability of connecting applications to list all users who have permission to a file. When a user in Quark Docurated connects Dropbox and begins indexing files, Quark Docurated will index the appropriate files and grant that user permission, but is unable to permission the file to other users that are granted permission in Dropbox. In order for other users to gain permissions in Quark Docurated, each must connect Dropbox to Quark Docurated.
Note: Dropbox has recently issued updates to its business offering that adds the “teams” feature. Similarly, the API has been updated with calls that allow listing of teams and team members. As this feature is adopted, it is possible the limitations of the Dropbox API that prevent full permission of files may be alleviated.

The Dropbox API call that allows applications to detect and process “shared folders” in Dropbox is listed as “in beta.” As such, the availability, performance, and result of this call are subject to change as Dropbox continues to build out its API.

Versions – The Dropbox API alerts Quark Docurated when files are modified and thus new “versions” are created. Quark Docurated updates the index accordingly with the new versions of these documents and removes the old ones, but lists those previous versions in a version history for each space. The versioning in Quark Docurated is entirely based on when Dropbox identifies a new version.

File Cleanup – Only files that currently appear in Dropbox can appear in Quark Docurated. If a file is removed from a Dropbox folder or deleted, Quark Docurated receives an API message that the file is deleted and removes it from the index. Additionally, if a user who was previously indexing a folder decides to un-select it, it will not longer be indexed going forward and all files that were in that folder will be deleted from the Quark Docurated index.

Appendix G: Active Directory and Single-Sign On

Activating SSO Integration

Single Sign-on is an access control system that enables the use of a single portal and set of credentials to sign-in to multiple independent applications (e.g. email, Salesforce, Quark Docurated, etc.)

1. Client to provide the following information prior to providing metadata URL configuration:
   - a. SAML Issuer URL
   - b. SAML Endpoint URL
   - c. x509 Certificate Fingerprint
   - d. Passive Requests Allowed: True/False

2. After confirming information in Step 1, provide users the following information:
   - Configure ORGNAME.<<SERVER-URL>> SSO URL. This will be the log in URL end-users will access to get into Quark Docurated.
If PassiveRequestsAllowed=True, then end-users will not need to enter their un/pw to log in, but will be directed to the application automatically after accessing the SSO URL.

Provide xml containing client URL and assertion attributes
- *emailaddress*, *givenname*, and *surname*.

3. Confirm that ORGNAME./<<SERVER-URL>> page is up and running.
   - Use SSO credentials to log in.

4. Once completed, users will be redirected back to Quark Docurated upon logging in via SSO.

5. Installing the Quark Docurated Client App (outlined in section below) in an SSO configuration is a slightly different process, we offer 2 options to activate the Client App Sync tool:
   - Option 1: Log in to Quark Docurated (via SSO), download Sync tool, run Installer and then click "Activate".
   - Option 2: Download Sync tool, run Installer.
   - If you are not logged into to Quark Docurated, use the following link for activation: https://<<SERVER-URL>>/activate_sync (<domain> is usually "secure", but could be different based on your installation).

**Quark Docurated and AD Integration**

Active Directory (AD) is a Microsoft service for Windows networks that acts as a domain control system, authenticating and authorizing all users and computers in the network.

**Note:**

We recommend setting PassiveRequestsAllowed=True, but this might not always work if a given client SSO setup is not activating SSO service upon log in into the machine. If that is the case PassiveRequestsAllowed=False should be used to enable display of the SSO log in page.

Note: Users activated via SSO will not be able to log in to Quark Docurated using regular Quark Docurated log in screen (https://<<SERVER-URL>>/login).

Quark Docurated and AD integration involves setting up Sync tool to run as a Service, configuring shared drive(s) to be crawled and then confirming permissions of folders to be reflected in Quark Docurated.

1. Install Sync tool as Service: (link to the latest Sync tool will be provided by Quark Docurated)

   Follow Installer instructions:
a. Enter your Quark Docurated credentials or click “Activate” button (this will also require your credentials if you are not currently logged into Quark Docurated)

b. On the settings screen, please select the following settings:
   i. File types to sync
   ii. Date range of files to sync
   iii. Folders to sync (specific folders or top-level directory from your shared drive)
      1. If it is a local path for a shared drive, you will be given an option to map it to UNC path. Please make sure to set UNC mapping for your selected shared drives.

c. Click “Finish” to complete the installation.

d. Quark Docurated Service will appear under Services Manager.
i. In some setups a different user needs to be running this service — please update Log On option accordingly under Quark Docurated Service -> Properties -> Log On.

2. After the Client App is installed, it will start crawling available folders and files immediately using our File Scan process.
   a. The sync tool scans shared drives that have been identified in preferences and creates a list of files and relevant domain information and sends that metadata to the server.
   b. List consists of: (1) name of file and other metadata, and (2) security information.
   i. Security information is: Allow/Deny MASK (type of permission, e.g. read/modify) for each SID (user/group) associated with it.
   c. File Scan will run at 3 hour intervals. Contact Quark Docurated to configure this interval to a different time period. Any new folder added to be crawled will trigger new File Scan immediately after Quark Docurated Sync tool Preferences screen is submitted.
   d. As listed in the Quark Docurated Sync Tool Installation steps, when configuring shared drives to be synced, make sure to use UNC mapping after selecting local shared drive. The option to set UNC mapping will be presented for shared drives that are available locally.
   i. This scan of files can occur for shared drives that are remote (as opposed to the local drive for the server where the sync tool is installed),
but this will likely cause it to take a lot longer to perform the scan doing it via network.

- ii. It’s better to install the sync tool on the server that hosts the files.

3. AD Scan consists of all the domain information previously mentioned (users’ emails, groups, domain name). The process is as following:

- a. Same as with File Scan, AD scan runs at 3 hours intervals. This can also be separately configured.

- b. Our current AD scan reads the following information:

  - i. CN – Common Names
  - ii. OU – Organizational Unit
  - iii. DC – Domain Component
  - iv. Email address of the user
  - v. SID – Security Identifier

- c. Users we scan via AD are created automatically in Quark Docurated.

  - i. Each user detected in the AD scan is assigned an activation flag that allows access to Quark Docurated when enabled. Currently, the activation process for a given user is handled by Quark Docurated.

  - ii. When integrating together with SSO and AD, you will have complete control of which users have access to Quark Docurated.

- d. The sync tool passes the AD Scan and File Scan to the Quark Docurated server, which parses them and sets correct permissions for users and groups.

4. This was built as a distributed service, so that many sync tools are installed on different servers all perform these scans and send them to Quark Docurated.

5. The system has been built to that guarantee permissions are accurate:

- a. Scans are run continuously to detect changes in file lists (new, modified files) and AD (new, modified permissions). The client app uploads complete scans each time and check for differences against previous scans.

- b. Scans are currently run every 3 hours, so there can be a delay between when permissions are changed locally and when they are reflected into Quark Docurated.

Appendix H: File Permissions

Files may be uploaded through a variety of methods:

1. Client App
- a. Local Sync
- b. Shared Drive Sync
- c. Sync as a Service
- d. Active Directory Sync

2. Box Integration
3. Google Drive Integration
4. Salesforce Integration
5. Dropbox Integration
7. Email into Quark Docurated
8. Web Clipper

**Client App**

All files uploaded through the client app are private by default. In order to automatically share files with a user or group that did not upload the files, two options are available:

- Active Directory permissions structure can be mirrored automatically by client app. All files will be permissioned strictly according to client's existing AD system. Users – see the “Active Directory” section for details.

- Ad hoc permissions can be created on a folder to team-user basis. The indicated file-path(s) will be shared with (typically) a team in Quark Docurated, such that any new folders or files added within that file-path will be automatically shared – contact Quark Docurated for this option.

**Install Options**

- Local Drives: A user who installs the client app on their local machine can add any local drive or folder to be synced. These files will remain private to the user unless a sharing option is chosen. A user may choose to share out any or all of these files once in Quark Docurated – only the user who owns the files has the ability to share them (even once shared with another user).

- Shared Drives: A user who installs the client app on their local machine can add a shared drive to be synced. Multiple users can point the client app at the same shared drive and the applications will communicate to properly upload all the selected contents.

- Note: whenever shared drive syncing is performed, it is best practice to either utilize AD-integration or contact Quark Docurated to set-up ad hoc folder-team automatic sharing.
- Users may sync different directories from the same shared drive and keep them private or choose a sharing method.
- Server Sync: See “Sync as a Service” section

**Box Integration** – see the user guide section on Box for more details.
- Quark Docurated mirrors the Box permissions structure into Quark Docurated
  - Owners of files in Box remain owners in Quark Docurated
  - All other users with view rights maintain those rights in Quark Docurated
  - Teams and users that don’t already exist in Quark Docurated when a file is synced are automatically provisioned in Quark Docurated.
  - Updates to file permissions in Box are detected by the integration and updated every ten to twenty minutes.
- Permissions to Box files can only be altered in Box.

**Manual Upload** – a user can click on “Add Content” at the top right of the page (or go to [https://<<SERVER-URL>>/upload](https://<<SERVER-URL>>/upload)). Then either drag file(s) to the indicated area or click “..or browse & select files..” and select file(s) from appropriate folder.
  - Files uploaded in this manner are shared with a user’s teams by default.
  - To keep files private, check “Keep the uploads private” just below the indicated upload area BEFORE you select/drag the files.
  - This option must be selected EACH time you upload files – it is not a saved setting.

**Email into Quark Docurated** – users can send emails with attachments to their Quark Docurated inbox (e.g. user.company@drop.Quark Docurated.com).
  - Emails and files that are uploaded in this manner are private by default.
  - To share emails with a user’s teams by default, update the preference under “Your Quark Docurated Inbox” in Accounting Settings ([https://<<SERVER-URL>>/profile](https://<<SERVER-URL>>/profile))

**Web Clipper** – webpages are added as private by default.

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**Appendix I: Updating User Profile**

User Profile controls can be found at [https://<<SERVER-URL>>/login“/profile](https://<<SERVER-URL>>/login“/profile) or by navigating to:

1. <User Name> in the top right
2. “Profile” (also known as “/profile”)

3. “Update Your Information”

- You will have an option to change your First and Last name
- Change your password
- Enable TFA (Two-Factor Authentication)

Appendix J: SharePoint Integration

Choose an existing account or create a new one to crawl SharePoint content. The best practice is to create a dedicated account for the exclusive use of the Sync service.

Provide proper rights to crawling account. For SP O365, the minimum requirements for the crawling account are as follows:

Site-Collection Admin - We prefer having site-collection admin privileges for any SharePoint site collection we're syncing. If we don't have site collection admin privileges, we won't be able to sync documents or groups that the crawling account doesn't have access to.
Non-Site-Collection Admin - If we can’t get site-collection admin privilege, we need the user to have “Full Control “over any site collection that needs to be synced. This can usually be accomplished by adding the crawling account to “Site Owners“ group.

Appendix K: Team Drive

Login to https://admin.google.com/

- Go to Security folder.
- Go to advanced settings.
- Select the “Manage domain wise delegation”
- Register the API client as mentioned below.
- Client ID: 116318474855872138004

**Scopes:**

https://www.googleapis.com/auth/drive.readonly

https://www.googleapis.com/auth/admin.directory.group.readonly

- Create service account for Sync e.g. Quark Docurated.sync@org.com. This is optional as existing account in the organization can also be used to Sync content.

- Set preferred role for Sync account. It should be “Contributor” for specific Team Drive.

If the role is Viewer/Commenter then we will not be able to fetch “Creator” information for the documents. To fetch “Creator” information we have to iterate document versions. In absence of this we set Sync Account as creator while syncing content.
Share root folder and sub folder ids. To get the folder ids

- Go to https://drive.google.com
- Select folder under “Shared Drives”
- Copy folder id from address bar

If a quark – in science – is the basis for all matter, then Quark – the company – is the basis for all content. The company revolutionized desktop publishing and today provides content design, automation and intelligence software for end-to-end content lifecycle management. Customers worldwide rely on Quark to modernize their content ecosystems so they can create complex print and digital layouts, automate omnichannel publishing of mission-critical documents, and analyze production and engagement insights for the greatest return on their content investments.

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