



Using BlueStep Data Vault™ with WebDAV

New BlueStep™ Functionality

In order to meet our client's needs and expand our capabilities and services, BlueStep™ has implemented the use of the WebDAV Internet standard in creating Data Vault™, a network-place storage tool.

WebDAV support is integrated into many of the latest operating systems on current computer systems and networks. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. BlueStep's platform-tailored version of WebDAV is named Data Vault.

Data Vault, similar to Microsoft's Web Folders, may only be used with operating systems and programs that have WebDAV support. These include Windows™ 98/2000/NT/ME/XP and Microsoft Office 2000™ (including later versions). Mac OS X™, Goliath™ for Mac OS 8.1, WebDrive™, Adobe GoLive™, Macromedia Dreamweaver™ and many others also support WebDAV.

Data Vault Functions

Data Vault provide several distinct advantages and valuable benefits, including:

- Drag-and-Drop functionality between user's computer and online Shared Files
- Upload and download of multiple files and folders in a single operation
- File and folder locking to prevent simultaneous updates by multiple users
- Easy availability through integration with the user's desktop
- Same online username/password for Data Vault™ access as for BlueStep™ access
- No need to use a browser for direct access of online files *

The Shared Files module in the BlueStep™ family of products is available through Team™, Connect™ and HQ™. Using Data Vault™ in conjunction with BlueStep Backup™, any file or folder in these applications may also be copied to multiple other user-selected locations, including local and remote locations. Additionally, files may be added, accessed, moved, edited and deleted using a drag-and-drop method or other standard keyboard cut-and-paste techniques. You may use either method (browser-based or desktop) at any time to perform these functions - using one does not preclude using the other when it is more convenient to do so.

* There are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to use a browser to perform these functions.



Creating Data Vault

Users of BlueStep™ products may have access to one or many Shared Files, depending upon the number of Teams, Connect™ sites or HQ™ systems available through their organizations. For each Shared File unit you would like to have available on your desktop, you will need to create a Data Vault. Once a vault is created for a specific Shared File page, you need never do so again. The Data Vault will be available on your desktop (or other area in your file system) and continue to reflect the current state of the online Shared Files unless you disconnect the vault.

At the bottom of each Shared Files page in BlueStep™, you will see a link [Instructions for Accessing via Web Folders \(WebDAV\)](#). Open this link and find the instructions that apply to the system you are using. Instructions are included for Windows 2000, XP, 98, NT, Mac OS X, Mac OS 8.1 or Dreamweaver.

Any operating system may be configured in a variety of ways on any given computer. We have made every effort to offer instructions that are specific, yet point you in the correct direction should your OS vary from the usual set up. The important item in the instructions is the link (beginning with "http..."). Please be sure to copy-and-paste or type it into the appropriate field *exactly* as shown, excluding quotation marks.

Using Data Vault

Once you have created a desktop Data Vault (instructions include adding a Data Vault shortcut to your desktop in most cases, but you may place it anywhere desired in your file system), you may open it and use any of several methods to add, delete or move files, including drag-and-drop, Ctrl C/Ctrl V, etc. Any actions that you take in the Data Vault will also occur within the Team™, Connect™ or HQ™ Shared Files pages.

As noted above, there are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to access the Shared Files pages online in order to perform these functions. They include setting file and folder permissions and overriding a file lock. Additionally, most WebDAV clients (Windows, GoLive, etc.) will not allow you to create a slideshow or use advanced locking capabilities, so you will also need to access the Shared Files pages online for these features. You will need to explore the capabilities of your specific WebDAV client and its configuration to determine which features are available to you, as they are not exclusive to BlueStep and not controlled by our Data Vault interface.

Securing Data Vault

As with all BlueStep™ products, security is one of our prime concerns. All permissions and locks available on the standard Shared Files pages are in force in the Data Vault. For instance, online Shared Files that you do not have permission to edit will still be unavailable for editing when contained in the Data Vault. Any folders that are locked in Shared Files will still be locked in the Data Vault. Conversely, any permissions you have been granted to the files/folders in Shared Files will also be fully granted in the Data Vault.

! *If at any time you receive an on-screen message stating that you may not perform a particular function with a file/folder in a Data Vault or if a Data Vault function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.* Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.



Rules for Locking and Unlocking Files/Folders

The locking/unlocking feature of WebDAV exists to prevent several users from making multiple file/folder changes simultaneously, some of which would override or supersede others, without regard to the permission status of the user or the importance of the edits.

The lock function of WebDAV operates under a series of universal rules (not designed by BlueStep), which all WebDAV-compliant systems must follow. These can be stated as a series of conditions, as described in BlueStep terminology.

Lock Types

There are four kinds of locks: **Primary**, **Secondary**, **Dependent-on-Parent**, **Dependent-on-Child**. Locks, like BlueStep permissions, depend upon a hierarchical structure. The 'Parent' in Dependent-on-Parent refers to a folder that is in a direct line above the subject file/folder. The 'Child' in Dependent-on-Child refers to a file or folder that is in a direct line below the subject folder.

- ▶ A **Primary Lock** is the only type of lock a user may add or remove. A Primary Lock fully restricts every modifying action (except by the lock owner) concerning the file/folder, but not viewing. A Primary Lock may be activated by the author of a file/folder and removed by the same person. Additionally, anyone with Editor permissions for this particular resource may also unlock the file. All other lock types are added/removed through the functioning of this lock.
- ▶ A **Secondary Lock** restricts every modifying action, but must be unlocked from the Primary Lock position
- ▶ A **Dependent-on-Parent Lock** is a secondary lock and restricts deletion, renaming or moving of files or folders. However, all other modifying actions (editing, new content, locking, changing permissions, adding files or folders, etc.) are allowed.
- ▶ A **Dependent-on-Child Lock** is a secondary lock and restricts deletion, renaming or moving of folders, changing permissions and recursive locking. All other modifying actions (editing, new content, adding files or folders to a folder, etc.) are allowed.

Locks and Locking Performance

Locks and their performance are affected by:

- ▶ The process (BlueStep™ Shared Files web interface, BlueStep Data Vault™, Microsoft Office™, WebDrive, etc.) being used at the time of locking
- ▶ The type of resource being locked – folder, file or versioned file
- ▶ The person who currently owns the specific lock on this resource
- ▶ The permission level of the person working with the resource
- ▶ The type of lock that is applied to this resource



Locking Interface

Different locking interfaces are employed by every WebDAV compliant software application. All Microsoft Office 2000™ (and later) products lock a file when they open it and unlock it by closing. In WebDrive™, locking and unlocking is controlled through a tab on the Properties dialog box, after locking has been specifically enabled. Other clients/programs/processes support some form of locking and unlocking, but the interface and its functioning is controlled by the structure of the program and its specific configuration on your computer, not by BlueStep.

Locking Files

A fully locked (Primary or Secondary Lock) file or versioned file is restricted in regards to adding content, editing, deleting, renaming, moving location and changing permissions. A versioned file can be locked by anyone with at least Author permissions. Non-versioned files require Editor permissions of the locking individual. A fully locked file results in other types of locks being activated on other file(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject file back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that are direct line, remain unlocked.

Locking Folders

Any locking of folders must be done by users with at least Author permissions. A fully locked folder results in other types of locks being activated on other folder(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject folder back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that are direct line, remain unlocked.


Folders may be locked either recursively or non-recursively. For a Recursive Lock, a Secondary Lock is created for all sub-folders and sub-files below the subject resource, flowing *down* through all levels of the hierarchy. For a Non-Recursive Lock, a Dependent-on-Parent Lock is created for all files and folders on the level immediately below the subject resource, but not for any hierarchical levels below the immediate level.

Unlocking Files and Folders

If you are the lock owner for the lock on any given resource, you may unlock the resource whenever and from wherever (from Web Folders, WebDrive, etc.) desired. You will always be able to go to the online interface (BlueStep™ Shared Files, for instance) and unlock it from there, in case the other processes have operated or closed abnormally. Users with Editor permissions may override locks, no matter who owns the lock.

! *If at any time you receive an on-screen message stating that a particular function cannot be performed with a file/folder in a Data Vault or if a Data Vault function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item. Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.*

Shared Files Manage Lock Screen

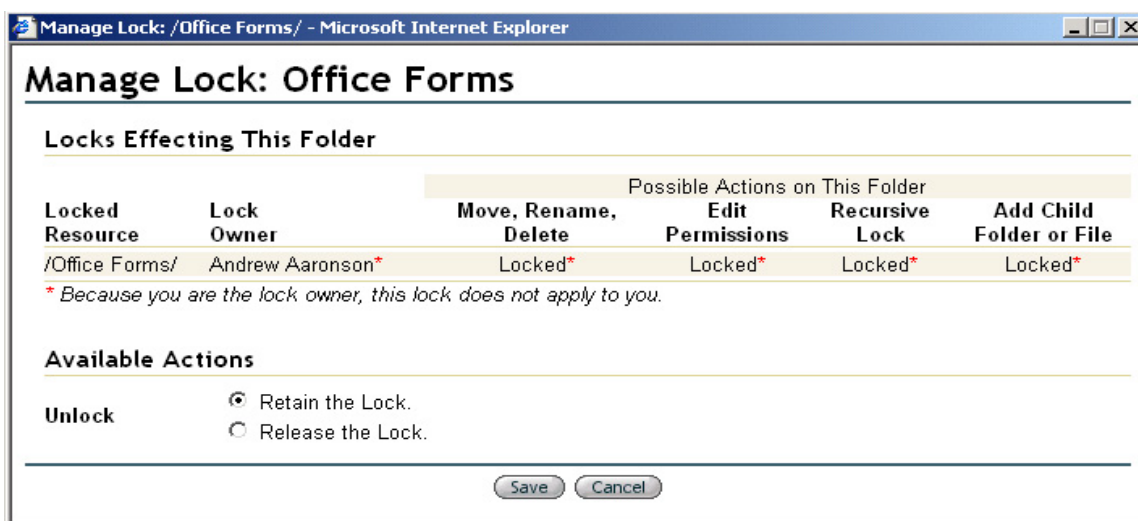
The Manage Lock screen is visible from the lock/unlock icons  in BlueStep's Shared Files page and the Manage Lock link on the Version Directory. It can display several variations for each file/folder in the Shared Files system. This makes for dozens of possible informational combinations on the screen. A couple of basic screens are displayed below.

Example 1 – A Non-Locked Folder



This Manage Lock screen is for a folder entitled Office Forms. The screen is divided into the information section, followed by the action section. When no locks are present, you will see the No Locks notation under Locked Resource and that the actions Move, Rename, Delete, Edit Permission, Add Recursive Lock and Add a Child Folder or File are available, if you so choose. There are also two locking actions that you may select under Available Actions. The first is a lock on the folder, the second makes the lock a recursive lock, if it was activated. These two checkboxes operate in tandem, depending upon the selections made.

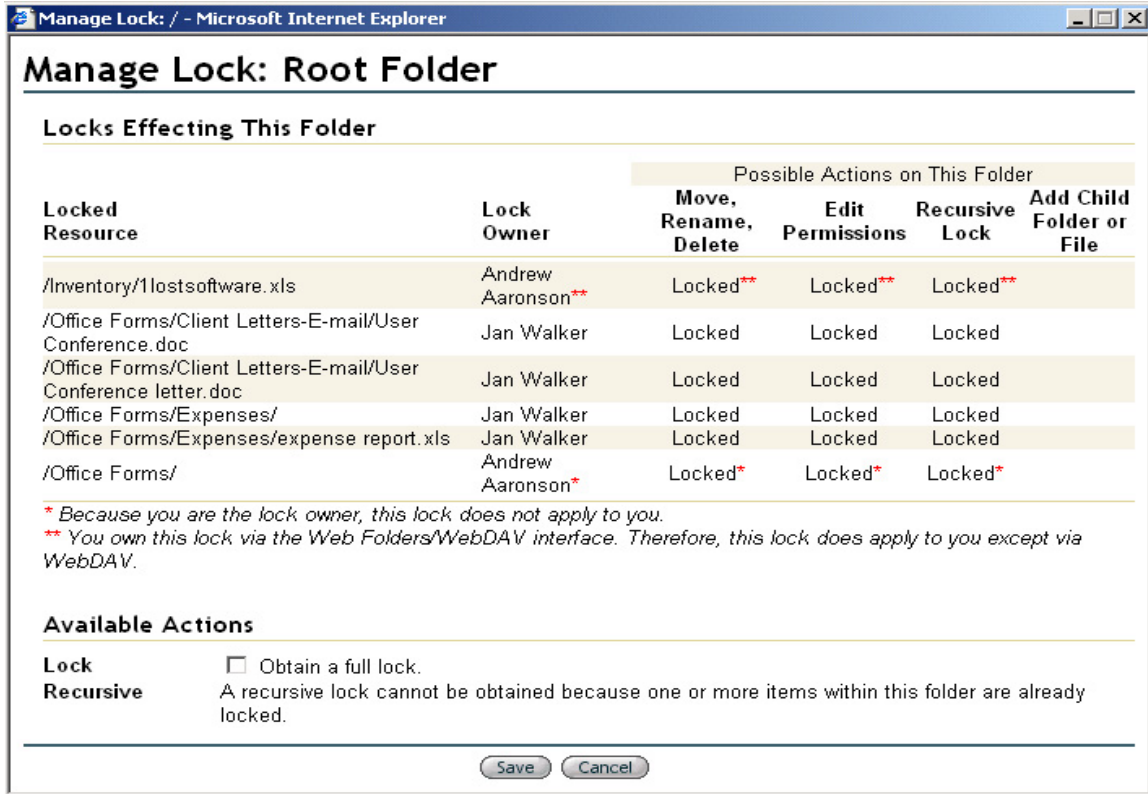
Example 2 – A Locked Folder, as seen by the lock owner



This screen is for the same folder as above, but displays the lock information. If you are the lock owner, red asterisks * explain that the locking functions will not prevent your actions, only those of

others. If you are not the lock owner, no asterisks will appear and you will see that your only recourse is to contact the lock owner for release of the lock. If you have Editor permissions, you will see locking override under Available Actions and will be able to proceed with unlocking.

Example 3 – Multiple Locks in Shared Files, as seen from the Root Folder



Manage Lock: Root Folder

Locks Effecting This Folder

Locked Resource	Lock Owner	Possible Actions on This Folder			
		Move, Rename, Delete	Edit Permissions	Recursive Lock	Add Child Folder or File
/Inventory/1lostsoftware.xls	Andrew Aaronson**	Locked**	Locked**	Locked**	
/Office Forms/Client Letters-E-mail/User Conference.doc	Jan Walker	Locked	Locked	Locked	
/Office Forms/Client Letters-E-mail/User Conference letter.doc	Jan Walker	Locked	Locked	Locked	
/Office Forms/Expenses/	Jan Walker	Locked	Locked	Locked	
/Office Forms/Expenses/expense report.xls	Jan Walker	Locked	Locked	Locked	
/Office Forms/	Andrew Aaronson*	Locked*	Locked*	Locked*	

* Because you are the lock owner, this lock does not apply to you.
 ** You own this lock via the Web Folders/WebDAV interface. Therefore, this lock does apply to you except via WebDAV.

Available Actions

Lock Obtain a full lock.

Recursive A recursive lock cannot be obtained because one or more items within this folder are already locked.

Save Cancel

By going to the Root Folder in Shared Files, you can see all the locks throughout the Shared Files system. There are dozens of possible locking configurations, depending upon the number of files/folders and the factors listed above under **Locks and Locking Performance**, such as type of resource being locked, the lock owner, the type of lock used, etc.



Step-by-Step in the Data Vault

Creating a Data Vault

- Go to the Shared Files page that you wish to have available in Data Vault
- Click the link at the bottom [Instructions for Accessing via Web Folders \(WebDAV\)](#)
- Find the instructions that apply to your operating system
- Copy the link beginning with “http...”
- Using the copied link follow the BlueStep instructions for your system (Instructions are copied in the



- appendix below)
- Use the same username and password that is used for your BlueStep products

Appendix

Data Vault and WebDAV

WebDAV support is integrated into many of the latest operating systems on current computer systems and networks. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. BlueStep's platform-tailored version of WebDAV is named Data Vault.

Data Vault, similar to Microsoft's Web Folders, may only be used with operating systems and programs that have WebDAV support. These include Windows™ 98/2000/NT/ME/XP and Microsoft Office 2000™ (including later versions). Mac OS X™, Goliath™ for Mac OS 8.1, WebDrive™, Adobe GoLive™, Macromedia Dreamweaver™ and many others also support WebDAV.

Data Vault Functions

Data Vault provide several distinct advantages and valuable benefits, including:

- Drag-and-Drop functionality between user's computer and online shared files
- Multiple uploads and downloads of files and folders
- File and folder locking to prevent simultaneous updates by multiple users
- Easy availability and integration with the user's desktop
- Same online username/password for Data Vault access as for BlueStep access
- No need to use a browser for direct access of online files*

By providing Data Vault, BlueStep™ makes these software features immediately available to any client using our Shared Files system.

The Shared Files module in the BlueStep™ family of products is available through Team™, Connect™ and HQ™. In these applications, any file may be posted through an online browse-and-upload procedure. Using WebDAV, any file or folder may be added to Shared Files, accessed, moved, edited and deleted using a drag-and-drop method (or other standard keyboard cut-an-paste technique). You may use either method (browser-based or desktop) at any time to perform these functions - using one does not preclude using the other when it is more convenient to do so.

* There are some advanced file and folder functions within Team™, Connect™ and HQ™ that only the BlueStep platform supports. You will still need to use a browser to perform these functions.

Creating Web Folders

Users of BlueStep™ products may have access to one or many Shared Files, depending upon the number of Teams, Connect™ sites or HQ™ systems available through their organization. For each Shared File you would like to have available on your desktop, you will need to create a Data Vault. Once a vault is created for a specific Shared File page, you need never do so again. The Data Vault will be available on your desktop (or other area in your file system) and continue to reflect the current state of the online Shared Files until you disconnect the folders.



You will find instructions below for setting up Data Vault under various operating systems, including Windows 2000, XP, 98, NT, Mac OS X, Mac Goliath and Dreamweaver. Any operating system may be configured in a variety of ways on any given computer. We have made every effort to offer instructions that are specific, yet point you in the correct direction should your OS vary from the usual set up. The important item in the instructions is the link (beginning with "http..."). Please be sure to copy-and-paste or type it into the appropriate field *exactly* as shown, excluding quotation marks.

Setting up Data Vault for Windows 2000

- Click on "Network Places" or "My Network"
- Select "choose another network location" or "Add a Network Place"
- Copy "<http://www.yourserver.bluestep.com/files/7746677/>" and paste it in the network place window and click the "Next" button
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- Click the "OK" button, then the "Finish" button
- If you are prompted for username and password again, reenter your BlueStep login, as above
- Right click on the new Shared Files name that now appears in the "Network Places" or "My Network" window
- Select "Rename" and enter a meaningful name of your choosing (for instance, "Files from MSED", "Downloaded Folders" or "Team Shared Files", etc.)
- Right click on the renamed file and select "Create Shortcut"
- Using drag-and-drop, place this shortcut on your desktop

Setting up Data Vault for Windows XP

- Select Control Panel
- Select "Network Connections"
- Click on "My Network Places"
- Click on "Add a Network Place", then the "Next" button
- Select "choose another network location", then the "Next" button
- Copy "<http://www.yourserver.bluestep.com/files/7746677/>" and paste it in the network place window and click the "Next" button
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- Type in a name for this network place in the indicated field
- Click the "Next" button, then the "Finish" button
- Right click on the new file and select "Create Shortcut"
- Using drag-and-drop, place this shortcut on your desktop

Setting up Data Vault for Windows 98/NT

- Open "My Computer" then click "Web Folders"
- Select "Add a Web Folder"
- Copy "<http://www.yourserver.bluestep.com/files/7746677/>" and paste it in the network place window and click the "Next" button
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- Click the "OK" button, then the "Finish" button (If you are prompted for username and password again, reenter your BlueStep login, as above)
- If you are prompted for username and password again, reenter your BlueStep login, as above
- Right click on the new Shared Files name that now appears in the "Network Places" or "My Network" window



- Select “Rename” and enter a meaningful name of your choosing (for instance, “Files from MSED”, “Downloaded Folders” or “Team Shared Files”, etc.)
- Right click on the renamed file and select “Create Shortcut”
- Using drag-and-drop, place this shortcut on your desktop

Setting up Data Vault for Mac OS X

- Select the “Connect to Server” command from the Finder or press Command K.
- Within the Connect to Server window, enter "http://www.yourserver.bluestep.com/files/77466/" and click the “Next” button
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- Click the “OK” button, then the “Finish” button (If you are prompted for username and password again, reenter your BlueStep login, as above)
- If you are prompted for username and password again, reenter your BlueStep login, as above
- Right click on the new Shared Files name that now appears in the “Network Places” or “My Network” window
- Select “Rename” and enter a meaningful name of your choosing (for instance, “Files from MSED”, “Downloaded Folders” or “Team Shared Files”, etc.)
- Right click on the renamed file and select “Create Shortcut”
- Using drag-and-drop, place this shortcut on your desktop
- Learn more at Apple's WebDAV page

Setting up Data Vault for Mac OS 8.1 – 9.2

- Go to http://www.webdav.org/goliath/installs/Goliath_0.9.1_Installer.hqx
- Download and install Goliath
- Start application by clicking on the Goliath icon
- Click on the Goliath New Connection screen
- Within the resulting window enter "http://www.yourserver.bluestep.com/files/7746677/"
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- Click OK

Setting up Data Vault with Dreamweaver

- Start the Dreamweaver application
- Click on the Site menu
- Select “Define Sites”
- Click the “New” button
- Enter a name for the site in the Site Name box
- Use the folder icon on Local Root Folder to specify a new folder for the files
- No entry is necessary in the HTTP Address info line
- Click on “Remote Info” in the Category section in the left side of the window
- In the Remote Info window, click the “Server Access” selection menu and choose “WebDAV”
- Click “Settings”
- Within the resulting window enter "http://www.yourserver.bluestep.com/files/7746677/"
- When prompted for a username and password, enter the regular username and password associated with the BlueStep™ products you are using
- No entry for the e-mail address is necessary, then click OK
- Click OK on the Remote Info window
- Click Done on the Define Site window
- On the Site window, click the button to connect

