



# Doc Exchange

Getting Started: External User Guide

# Doc Exchange Getting Started – Overview

**Doc Exchange**, the **external file sharing tool** at Cisco, is available for securely sharing and exchanging files with our customers and partners. This tool is developed to meet all Cisco **Data Protection Standards** and implements the features needed to securely and easily exchange highly confidential data.

## Feature highlights of the Doc Exchange tool include:

- Files that are classified as Cisco Public, Cisco Confidential and Cisco Highly Confidential with external users outside of Cisco firewall having CCO login credentials
- Document sharing between Cisco & Cisco Customers & Partners to upload content and collaborate
- Publish and un-publish files instantly
- Set expiration date(s) for a published content
- Generate reports to monitor file share activity
- Transfer files up to 500MB in size
- Enable domain validation (@customer name.com) to only allow users with a predefined domain on their CCO account to access files
- Manage access privileges for files and folders for viewing, downloading & editing
- Allow external users to participate in an approval workflow and allow them to provide feedback
- Automated e-mail notifications about published content and approval workflows
- Support most common Mime types and file formats

# Doc Exchange Getting Started – CCO User Account Creation

(You must have a valid CCO user account to use the **Doc Exchange** tool)

1. From your browser, go to [www.cisco.com](http://www.cisco.com) and register as a Guest, Customer, or Partner.  
(Please speak to your Cisco contact to ensure the correct selection)



2. Complete the registration process by selecting the [Register] option.

 \*\*\* Please ensure to use your business email address \*\*\*

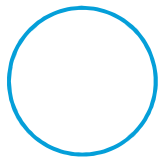
3. An activation link will be sent to your business email address.
4. Select the [Activate your Cisco Account](#) link within the email to complete your registration.

## Doc Exchange Getting Started – Permissions

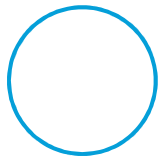
You must have a valid CCO user account to use the **Doc Exchange** tool AND a Cisco employee must have added you to a particular folder

1. From your browser, go to <https://ciscoshare.cisco.com>  
\*\*\* Please ensure you are using the latest version of either IE, Firefox or Chrome. \*\*\*\*
2. You will only see folders and files that have been published to you by your Cisco contact.  
**If you do not see any folders or files, or do not see those that you expect to see, please reach out to your Cisco contact directly to confirm permissions.**
3. Only Cisco employees can have folder admin permissions to create new folders, rename folders or change folder structure. If you have a request, please reach out to your Cisco contact directly.

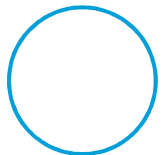
# Doc Exchange Roles



**Viewer Role** – A *Viewer* can preview a file online but cannot edit, download or perform any actions with the document.



**Reader Role** – A *Reader* can perform all Viewer actions in addition to downloading copies of the document.



**Editor** – An *Editor* can perform all Reader actions in addition to editing files and uploading new versions of the document.

# Viewer Capabilities – A *Viewer* can preview a file online but cannot edit, download or perform any actions with the document.

Doc Exchange

Welcome, Glenn Newblom (newblomglenn1)  
Connected to: Richardson

Search in Viewer

Support

My Favorites

What's New

Library

Viewer

My Tasks

Reports

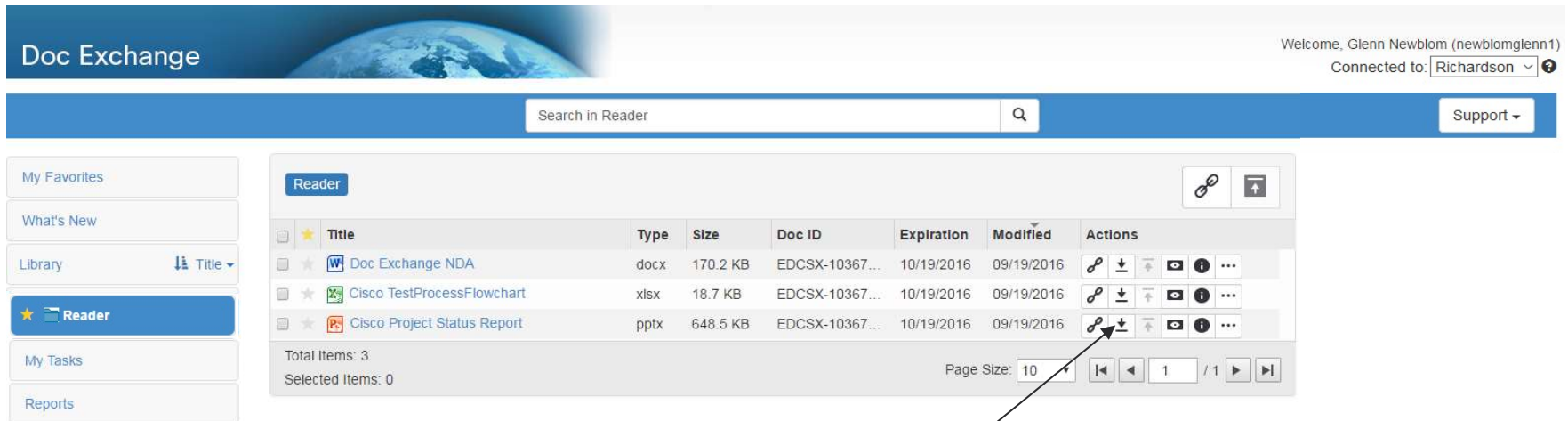
Title	Type	Size	Doc ID	Expiration	Modified	Actions
Doc Exchange NDA	docx	170.2 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share] [Download] [Preview] [Info] [More]
Cisco TestProcessFlowchart	xlsx	18.7 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share] [Download] [Preview] [Info] [More]
Cisco Project Status Report	pptx	648.5 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share] [Download] [Preview] [Info] [More]

Total Items: 3  
Selected Items: 0

Page Size: 10 / 1

1. Locate the document to be viewed
2. To Preview the document, select the **Preview Document** icon in the actions column.

# Reader Capabilities – A *Reader* can perform all *Viewer* actions in addition to downloading copies of the document.



The screenshot shows the Doc Exchange interface. At the top, there is a header with "Doc Exchange" on the left and a user greeting "Welcome, Glenn Newblom (newblomglenn1)" on the right, along with a "Connected to: Richardson" dropdown. Below the header is a search bar labeled "Search in Reader" and a "Support" button. On the left side, there is a navigation menu with options: "My Favorites", "What's New", "Library" (with a "Title" dropdown), "Reader" (highlighted with a star and a document icon), "My Tasks", and "Reports". The main content area is titled "Reader" and contains a table of documents. The table has columns for "Title", "Type", "Size", "Doc ID", "Expiration", "Modified", and "Actions". There are three rows of documents listed. Below the table, it shows "Total Items: 3" and "Selected Items: 0". At the bottom right of the table area, there is a "Page Size" dropdown set to "10" and a pagination control showing "1 / 1". An arrow points from the "Download Document" icon in the "Actions" column of the first row to the third step of the list below.

Title	Type	Size	Doc ID	Expiration	Modified	Actions
Doc Exchange NDA	docx	170.2 KB	EDCSX-10367...	10/19/2016	09/19/2016	Preview Document Download Document
Cisco TestProcessFlowchart	xlsx	18.7 KB	EDCSX-10367...	10/19/2016	09/19/2016	Preview Document Download Document
Cisco Project Status Report	pptx	648.5 KB	EDCSX-10367...	10/19/2016	09/19/2016	Preview Document Download Document

1. Locate the document to be viewed
2. To Preview the document, select the **Preview Document** icon in the actions column.
3. To Download the document, select the **Download Document** icon in the actions column.

# Editor Capabilities – An *Editor* can perform all Reader actions in addition to editing files and uploading new versions of the document.

The screenshot shows the Doc Exchange interface. At the top, there is a header with "Doc Exchange" on the left and a welcome message "Welcome, Glenn Newblom (newblomglenn1)" and "Connected to: Richardson" on the right. Below the header is a search bar labeled "Search in Editor" and a "Support" button. On the left side, there is a navigation menu with options: "My Favorites", "What's New", "Library", "Editor" (highlighted), "My Tasks", and "Reports". The main content area is titled "Editor" and contains a table of documents. The table has columns for "Title", "Type", "Size", "Doc ID", "Expiration", "Modified", and "Actions". There are three rows of documents: "Doc Exchange NDA" (docx, 170.2 KB), "Cisco TestProcessFlowchart" (xlsx, 18.7 KB), and "Cisco Project Status Report" (pptx, 648.5 KB). Each row has a set of action icons in the "Actions" column, including a share link icon, a download icon, an upload icon, a preview icon, and an information icon. Below the table, it says "Total Items: 3" and "Selected Items: 0". At the bottom right of the table area, there is a "Page Size" dropdown set to "10" and pagination controls showing "1 / 1".

Title	Type	Size	Doc ID	Expiration	Modified	Actions
Doc Exchange NDA	docx	170.2 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share Link] [Download] [Upload] [Preview] [Info] [More]
Cisco TestProcessFlowchart	xlsx	18.7 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share Link] [Download] [Upload] [Preview] [Info] [More]
Cisco Project Status Report	pptx	648.5 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Share Link] [Download] [Upload] [Preview] [Info] [More]

1. Locate the document to be viewed
2. To Preview the document, select the **Preview Document** icon in the actions column.
3. To Download the document, select the **Download Document** icon in the actions column.
4. To Upload a new version of the document, select the **Upload Document** icon in the actions column.
5. To share a notification to other users about a new document (s) you have just uploaded, click the **Share Link** icon in the actions column.



# Support

The screenshot shows the Cisco Doc Exchange interface. At the top, there is a header with 'Doc Exchange' on the left and a user greeting 'Welcome, Glenn Newblom (newblomglenn1)' on the right, along with a 'Connected to: Richardson' dropdown. Below the header is a search bar labeled 'Search in Editor' and a 'Support' dropdown menu. The main content area is titled 'Editor' and displays a table of documents. The table has columns for Title, Type, Size, Doc ID, Expiration, Modified, and Actions. Three documents are listed: 'Doc Exchange NDA' (docx, 170.2 KB), 'Cisco TestProcessFlowchart' (xlsx, 18.7 KB), and 'Cisco Project Status Report' (pptx, 648.5 KB). Below the table, it shows 'Total Items: 3' and 'Selected Items: 0'. A pagination bar indicates 'Page Size: 10' and '1 / 1'. A sidebar on the left contains navigation options: My Favorites, What's New, Library, Editor (selected), My Tasks, and Reports. An arrow points from the 'Support' dropdown menu to the text below.

Title	Type	Size	Doc ID	Expiration	Modified	Actions
Doc Exchange NDA	docx	170.2 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Link] [Download] [Share] [Info] [More]
Cisco TestProcessFlowchart	xlsx	18.7 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Link] [Download] [Share] [Info] [More]
Cisco Project Status Report	pptx	648.5 KB	EDCSX-10367...	10/19/2016	09/19/2016	[Link] [Download] [Share] [Info] [More]

It is best to contact your Cisco representative directly to address questions or issues with Doc Exchange.

When all else fails, you may choose to **Email Support** from the **Support** drop down.

