Objective CONNECT

GETTING STARTED FOR PARTICIPANTS

YOUR GUIDE TO OBJECTIVE CONNECT

GREAT GOVERNANCE »» BETTER BUSINESS

Objective

Objective CONNECT

Welcome to the next generation of secure external collaboration!

Key features in this update

- Use Experience Driven Design
- Locate documents faster with thumbnails
- Preview Office Documents in the browser, without downloading

About Objective Connect

With government-grade security, Objective Connect creates secure, private workspaces in the cloud to collaborate on documents, capture conversations and control tasks.

From cross-agency collaboration, working with outsourced service providers or simply digitally engaging with customers and citizens, Objective Connect can be used to manage any process involving external parties.

Information Governance can be maintained by integrating Objective Connect with an organisation's existing document and records management system, ensuring a 'single source of truth' is always maintained, even when working with external parties.

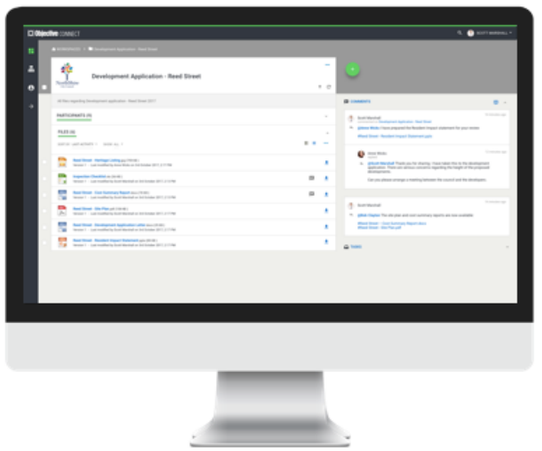
Because it can be used to manage any business process, Objective Connect enables digital transformation – removing the need for paper, email, thumb drives, DVD's and rogue or shadow IT.

We want your feedback!

The following Guide is designed to enable you to get started with Objective Connect.

The guide covers key concepts such as navigation, managing documents, capturing conversations, controlling tasks and inviting additional participants to the secure workspace.

If you require further assistance, visit us on objectiveconnect.com and find How To Video and helpful FAQ section.



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2. Collaborate on Documents
3. Capture Conversations
4. Managing Tasks
5. Objective Connect Mobile App

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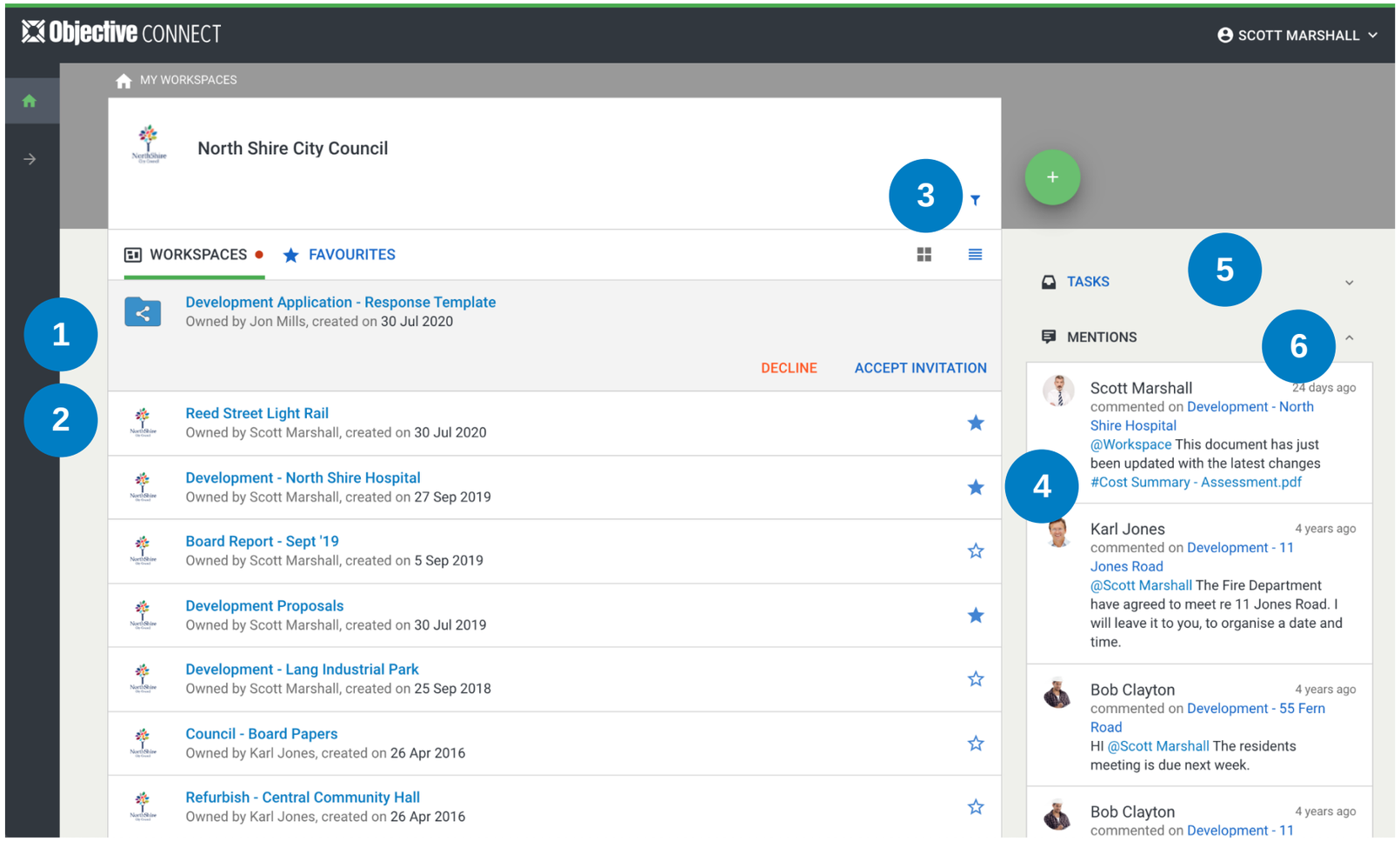
1. NAVIGATION

Getting Started

Once you have logged into Objective Connect, you will see the list of secure Workspaces, you have access to.

On this initial page you can:

1. **View all of the secure Workspaces**, that you have created or been invited to.
2. Click on the Workspace name to **view the contents** of that Workspace.
3. Click the filter icon to **filter and search** the Workspaces that you have been invited to.
4. **Star** a Workspace to add it to your **Favourites**.
5. All of the **Tasks** where you have been mentioned, across all Workspaces, will be listed under the Tasks menu.
6. All of the **conversations** where you have been mentioned, across all Workspaces, will be listed under the Comments menu.



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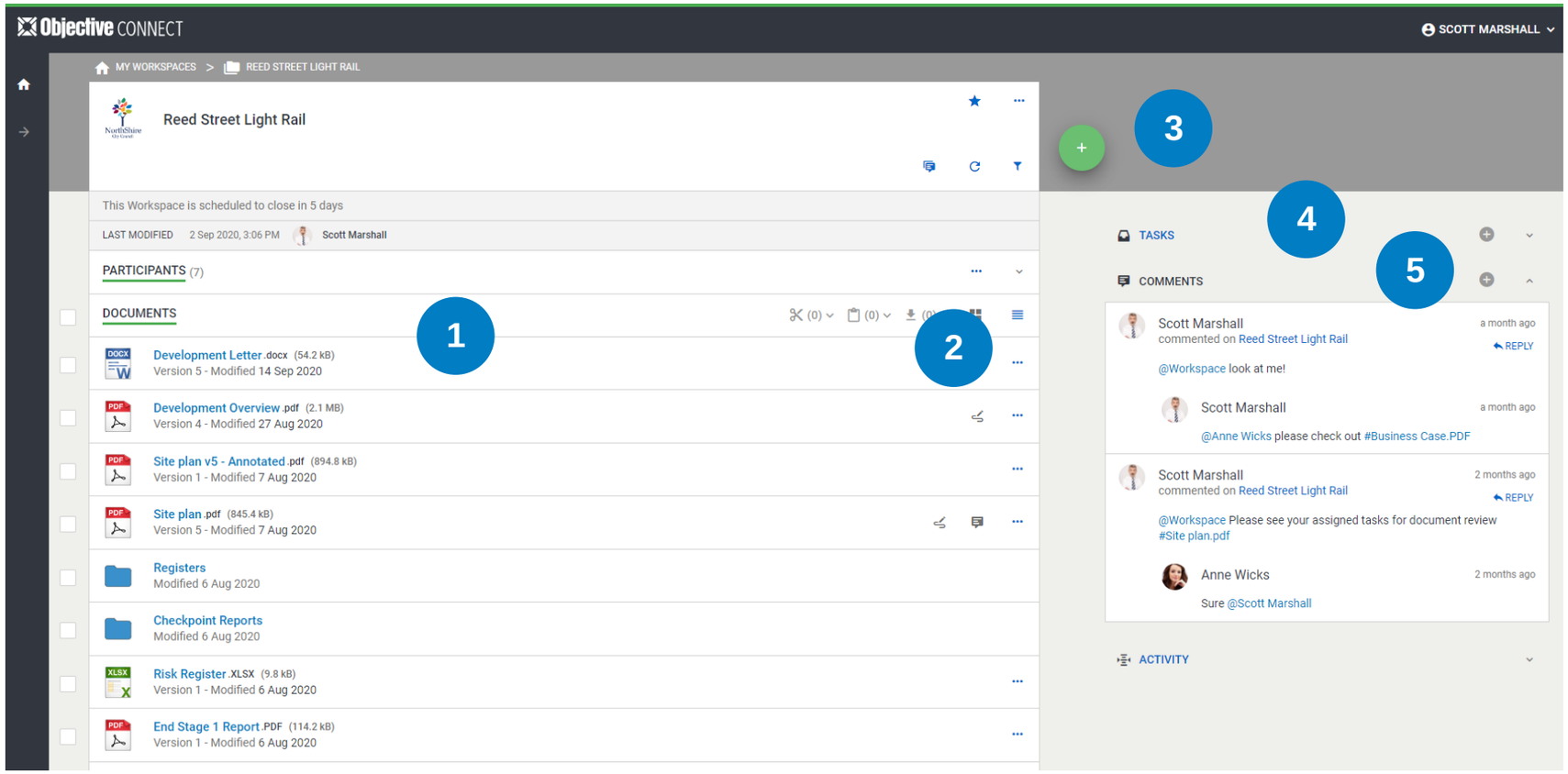
Navigation

In each secure, private Workspace you can:

1. **Preview documents** by clicking on the document row.
2. Download a document - click on the **… menu.**
3. **Add documents** or Folders by clicking on the green **+ icon**.
4. View and complete **Tasks** that are assigned to or created by you.
5. Add and view comments.



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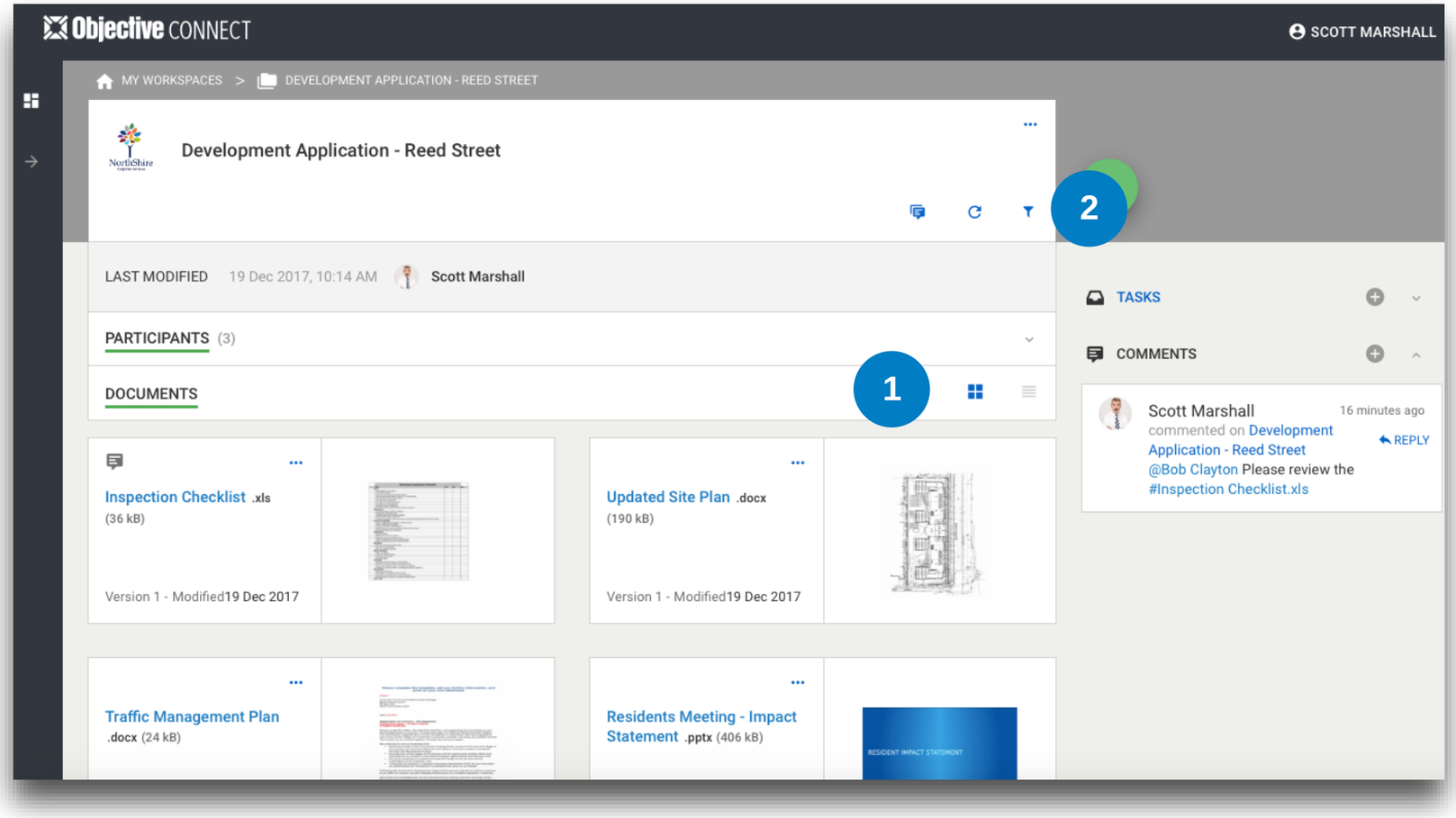
Switch view, filters and sorting

A thumbnail preview of all PDF, Image and Office documents is now available in each Objective Connect Workspace.

1. Click the **Grid and List icons** to switch views of your workspace.
2. **Click the filter button to search for files and to sort files by criteria such as date and name.**



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Upload a profile photo

To make it easier for other people to identify you within Objective Connect, you have the ability to upload a photo to your profile.

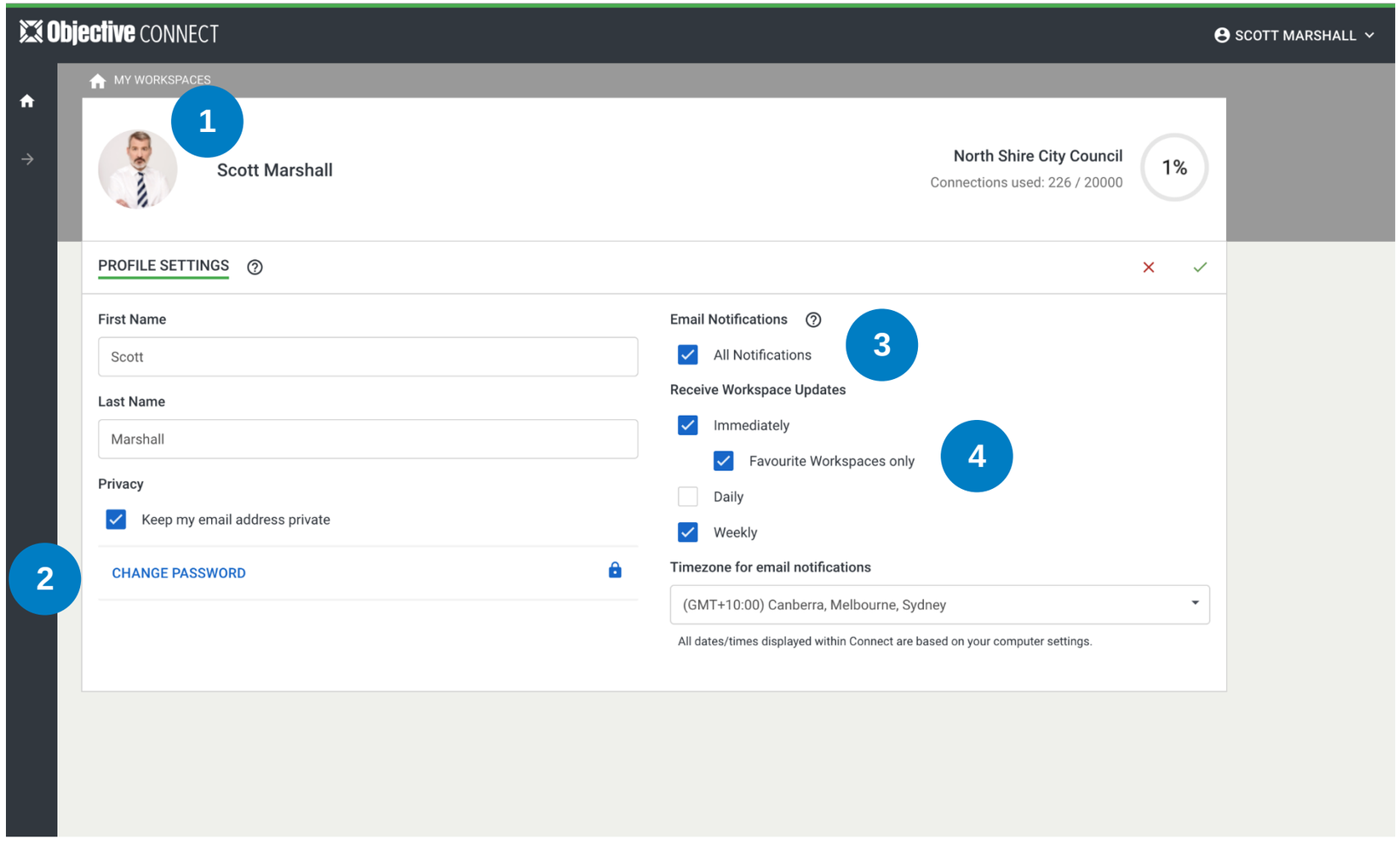
This photo will be used whenever you make a comment or are involved in a Task.

To upload a photo access the Settings menu located under your user name in the top right corner of the page.

1. Click the **+** icon to upload a **photo** from your desktop

From the settings screen you can also:

2. Change your **password**.
3. Set the frequency for **email notifications**.
4. Adjust your **Favourite Workspaces** settings.



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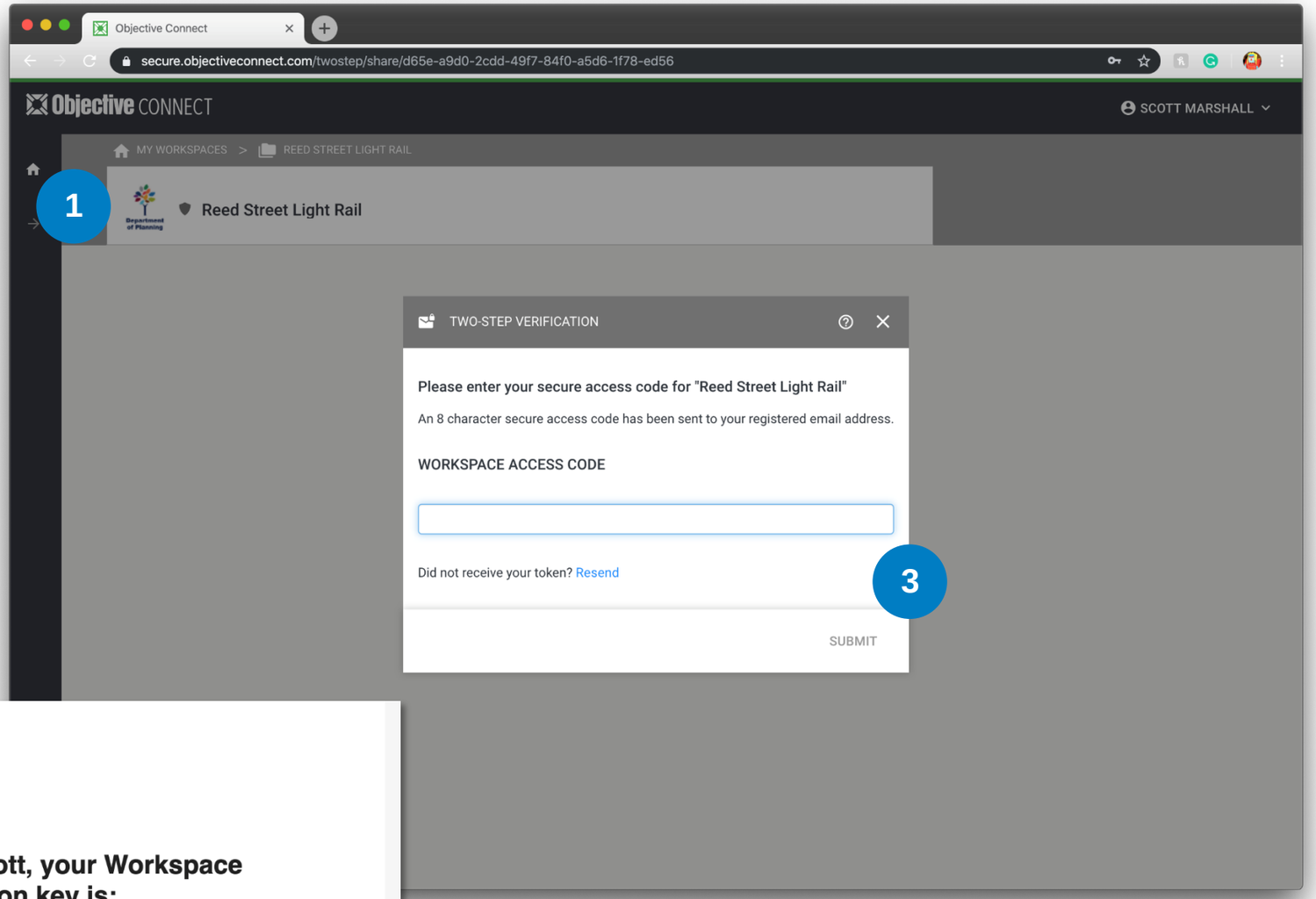
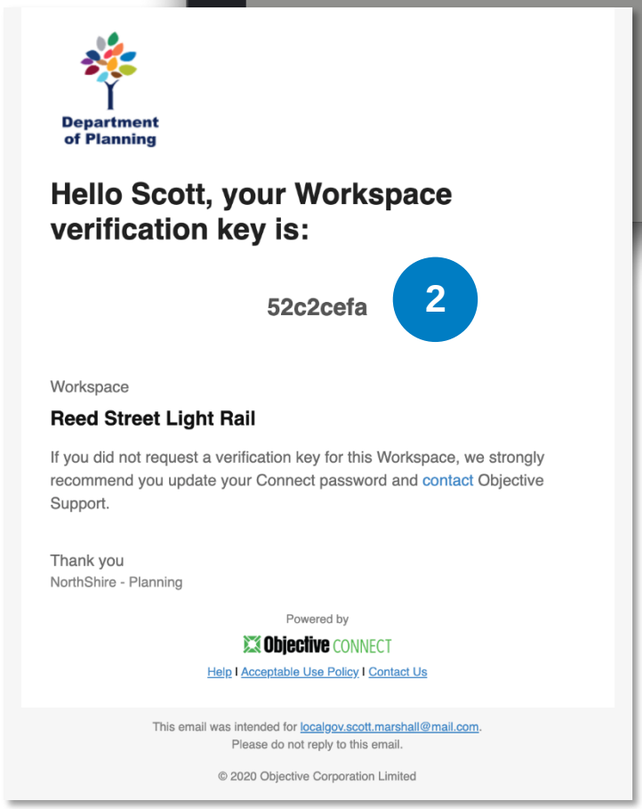
2-Step Verification

Workspaces can have 2 Step Verification enabled, which is set up by the Workspace Owner.

1. These Workspaces can be identified by a small grey shield next to the name.
2. If you have been invited into a Workspace with this enabled, you will need to enter the access code, which will be sent to your business email (the one you were invited to the Workspace).
3. Copy the access code over and click submit.

If you are a Workspace Owner and wish to enable/ disable 2 Step Verification **click here** for a quick explainer video.





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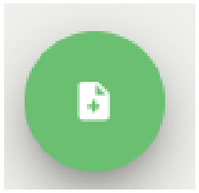
COLLABORATE ON DOCUMENTS

Adding Documents

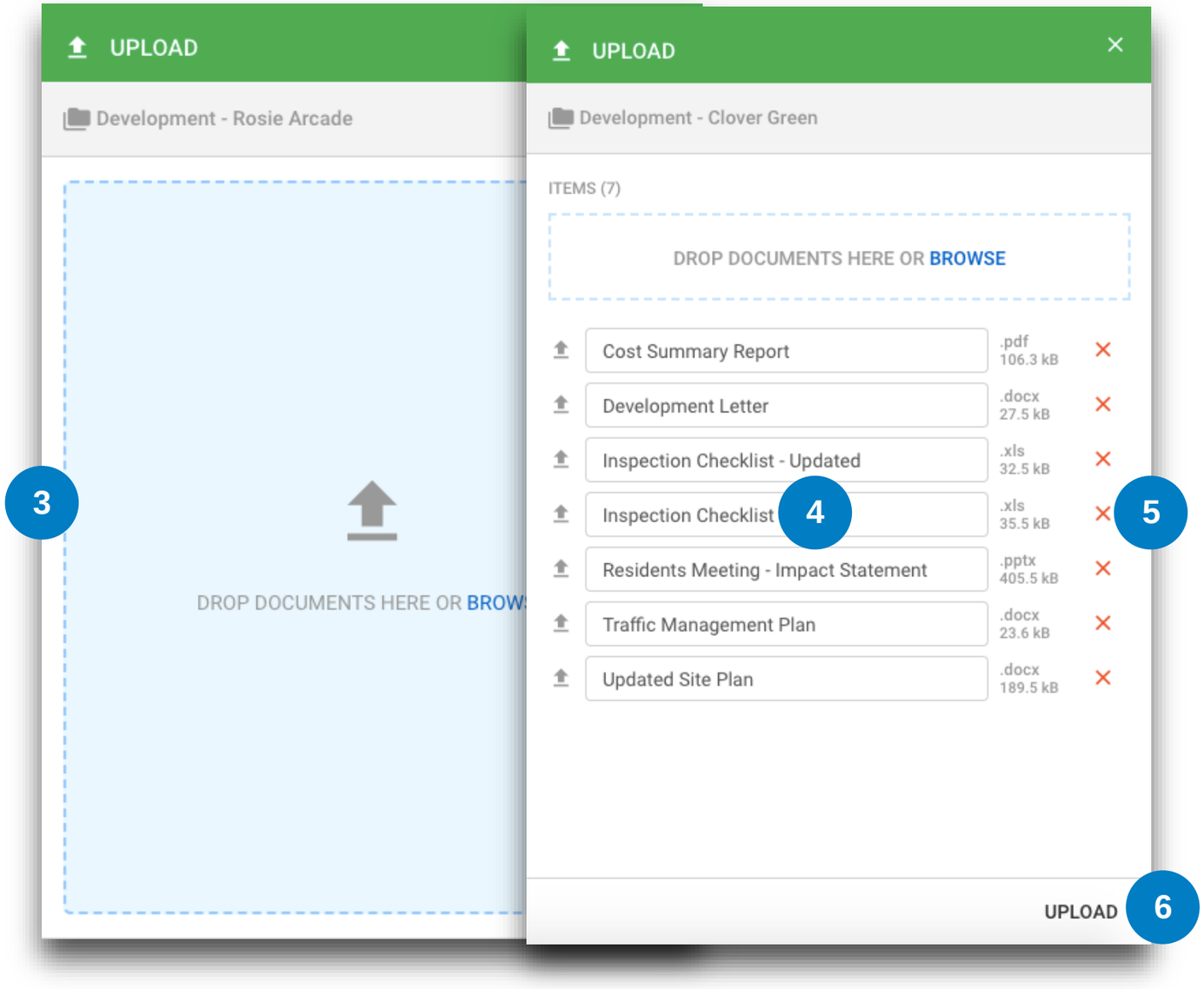
To add documents to a workspace:

1. Click the green **+ icon**.

2. Select the '**Add Document**' document icon.



3. Either **drag and drop** your document into the space provided or use the document picker to add a document.
4. The files you have selected will be listed in the blade. Files can be **renamed** before uploading to Connect
5. Use the 'X' icon to **remove** any documents that you do not wish to upload.
6. Click **upload**.



You will now see the upload progress of each document in the blade. For large files that take longer to upload, you can leave the blade open and navigate away to other locations in Connect.

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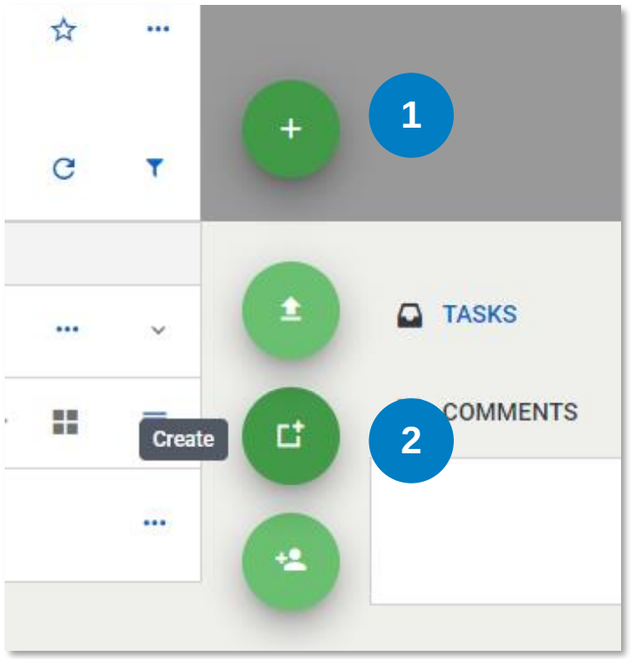
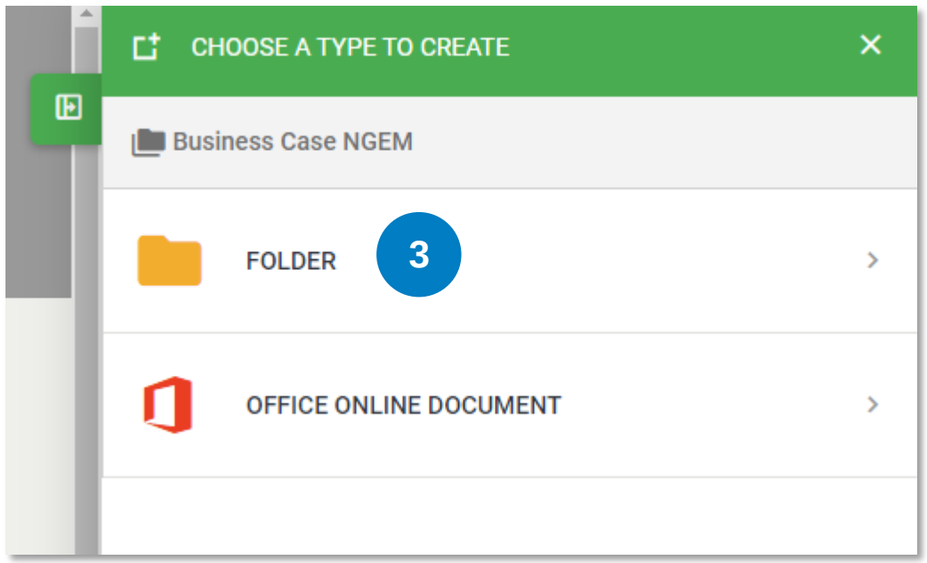
Creating Folders

To add folders to a workspace:

1. Click the green **+ icon**.
2. Select “Create Object”
3. Select “Folder” from the blade



Note: If you have integrated Objective Connect with a Document Management System, the ‘Add Folder’ button may not be available.



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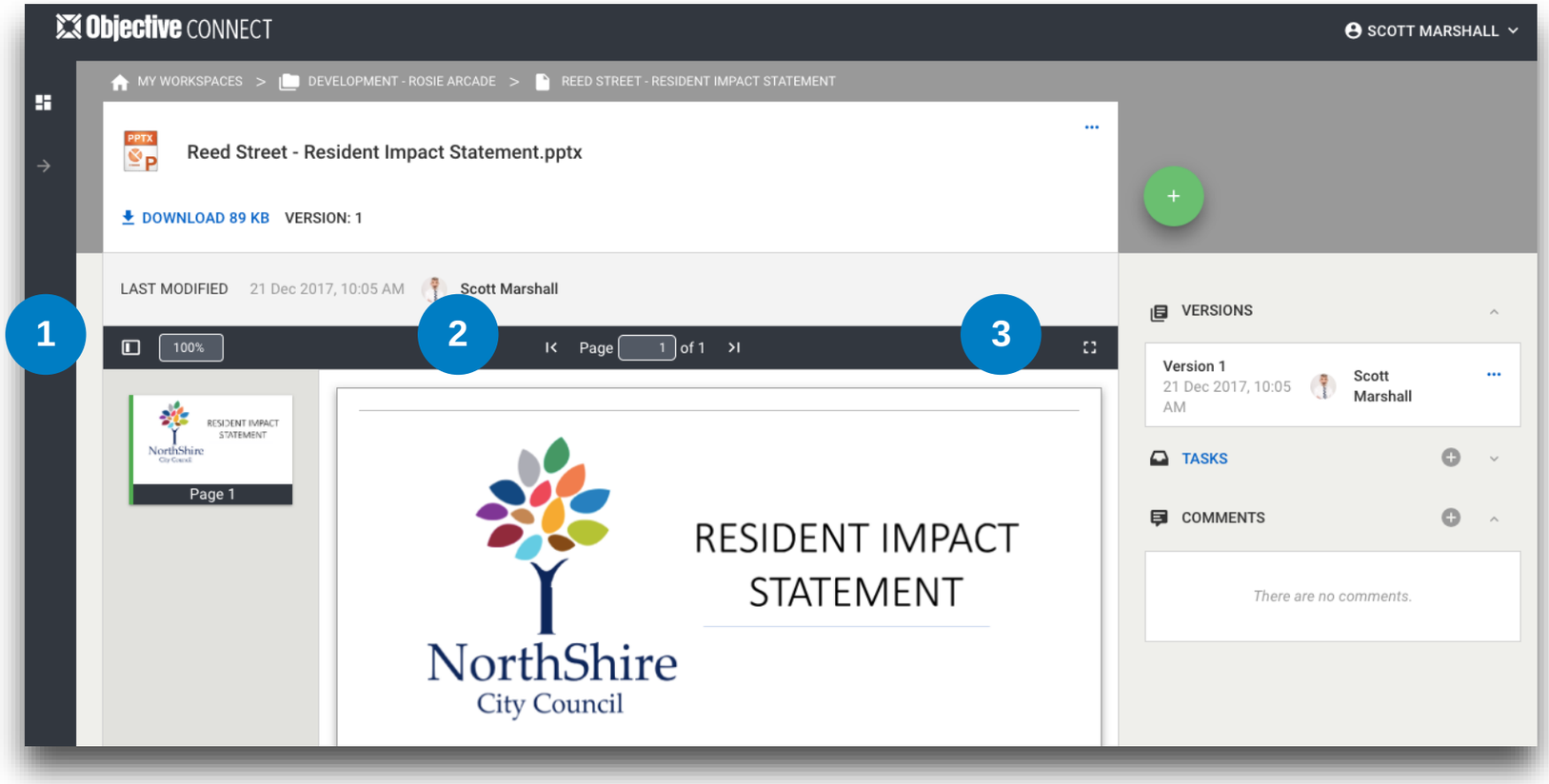
Previewing Documents

Certain file types can be previewed without the need to download the file. File types that can be previewed include:

- PDF.
- Microsoft Office files including .doc, .docx, .xls, .xlsx, .ppt and .pptx.

To preview a document, click the name of the document. A new page will be launched with document preview:

1. View thumbnails of pages.
2. **Zoom** in and out. Skip to specific page numbers.
3. View **full screen** mode.



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Downloading Documents

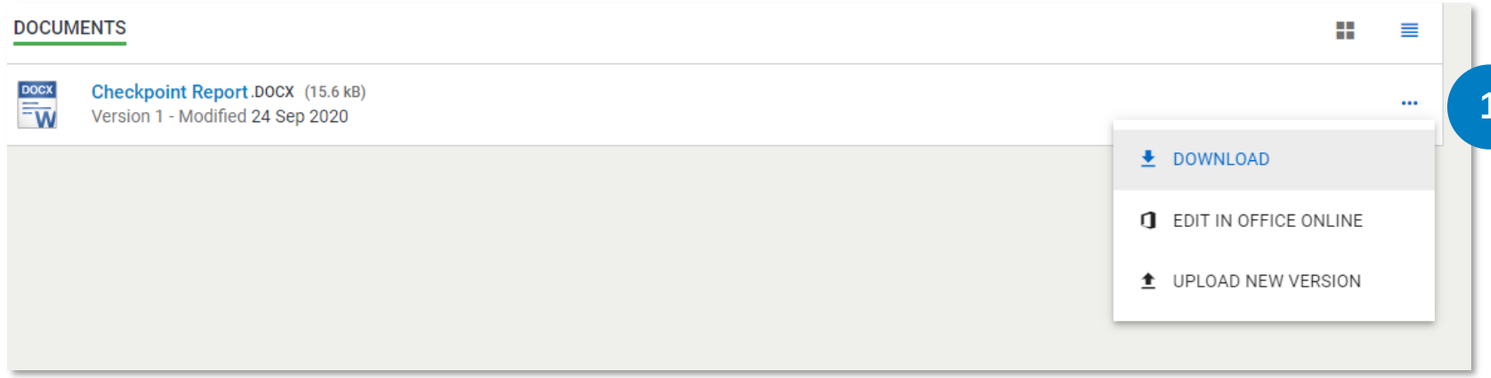
You can download documents individually or in bulk.

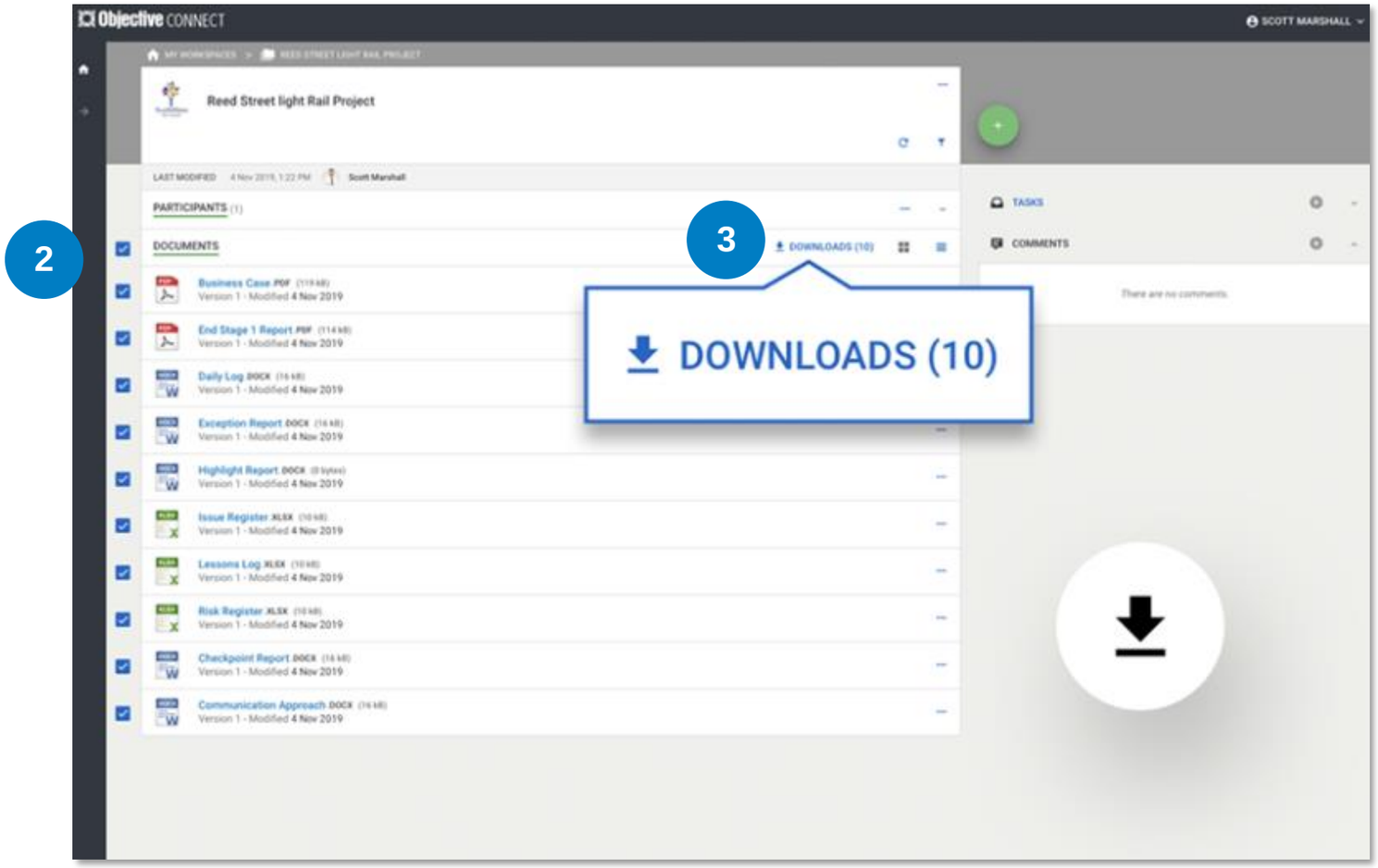
1. To download documents individually, navigate to the ellipses menu and “click download”.

To use **Bulk Download**

2. Select the square box next to Documents
3. Navigate To Downloads and click on the arrow

Click here for additional information on bulk download





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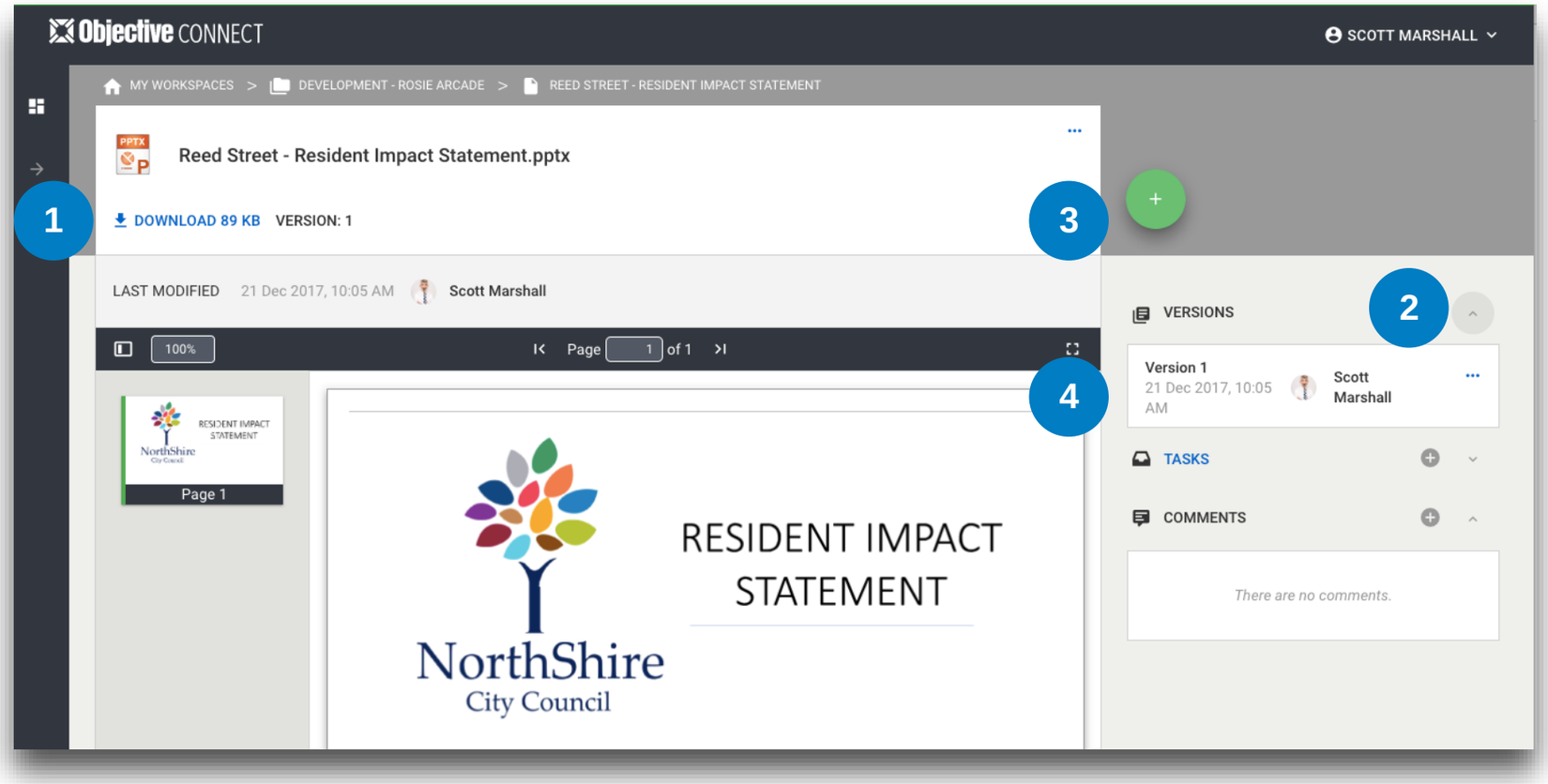
Managing Document Versions

Multiple Participants can work on the same document, saving them as different versions in order to keep a record of changes made.

For version control options for a document:

1. Click on the document name to open the preview.
2. Click the ⌄ **Versions menu**. All available versions will be listed and are available for download.
3. To **add a new version,** click the green **+** icon and a blade will appear. D**rag and drop** or use the document picker to upload a document version.
4. Each document version is displayed with a version number, the editor/creator and the date/time it was last edited.



If you do not have permission to edit a document within the Workspace, the Add New Version button will not be visible.

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Secure Online Edit

There are two ways you can Edit Online:

1. Navigate to the document you want to edit and click the ellipses menu ("…"). Select "Edit in Office Online"

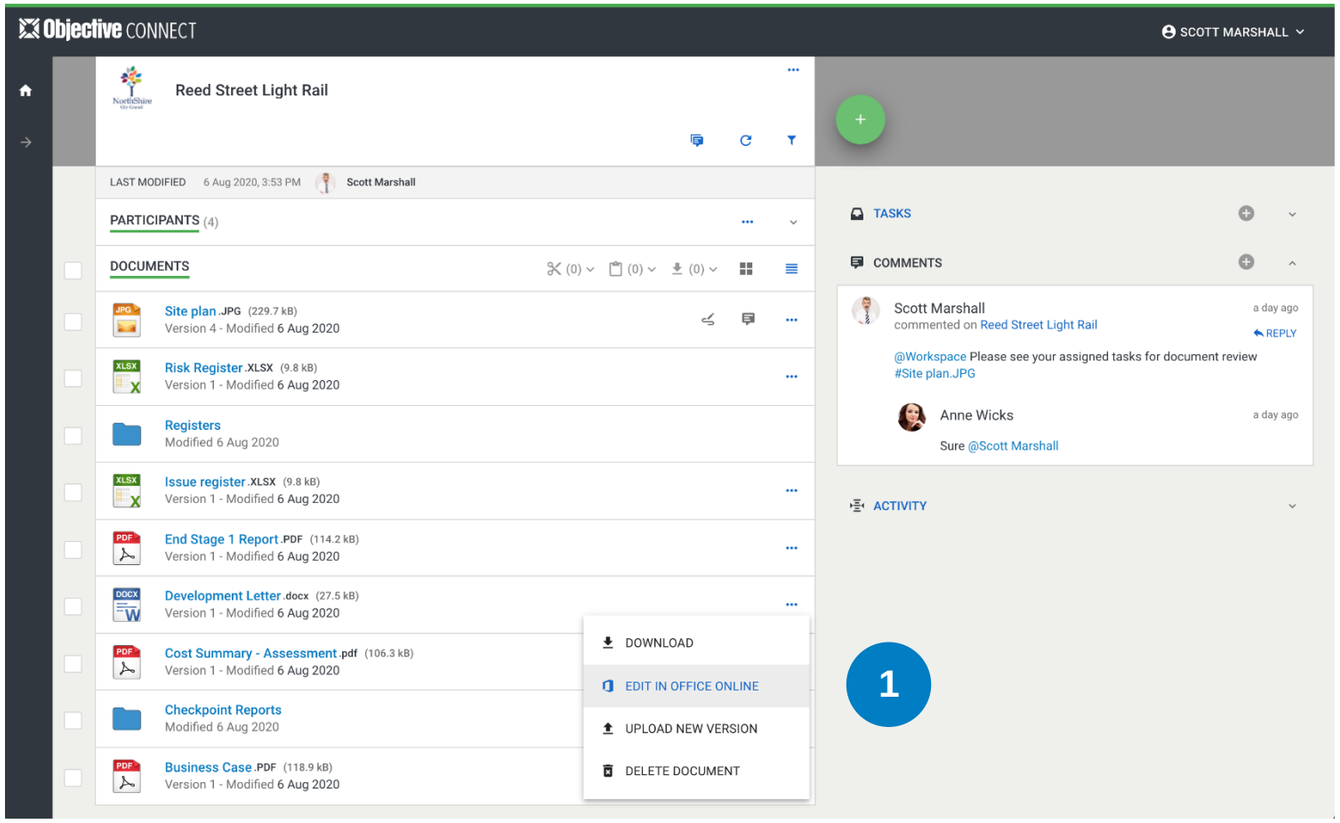
   Or

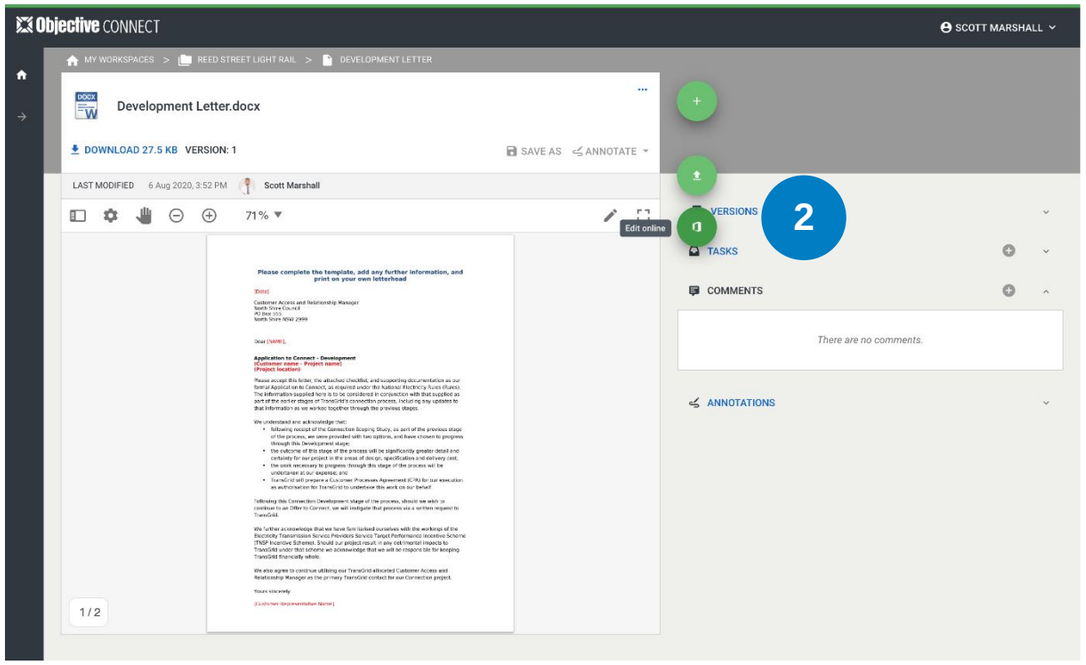
2. Preview the document, click the green floating action button and select the "Edit Online" button. Note: There is a max file size for Objective Connect so if the document is larger it may not preview.

When you first use this feature you will be asked to sign in. Please use your O365 email and password to sign in, not your Objective Connect password.

If you do not have permission to edit a document within the Workspace, the Secure Online Edit button will not be visible.

The latest version stored in Connect will be by the last Participant to close the document.





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Create Online

Create documents within Connect using the Secure Online Edit feature.

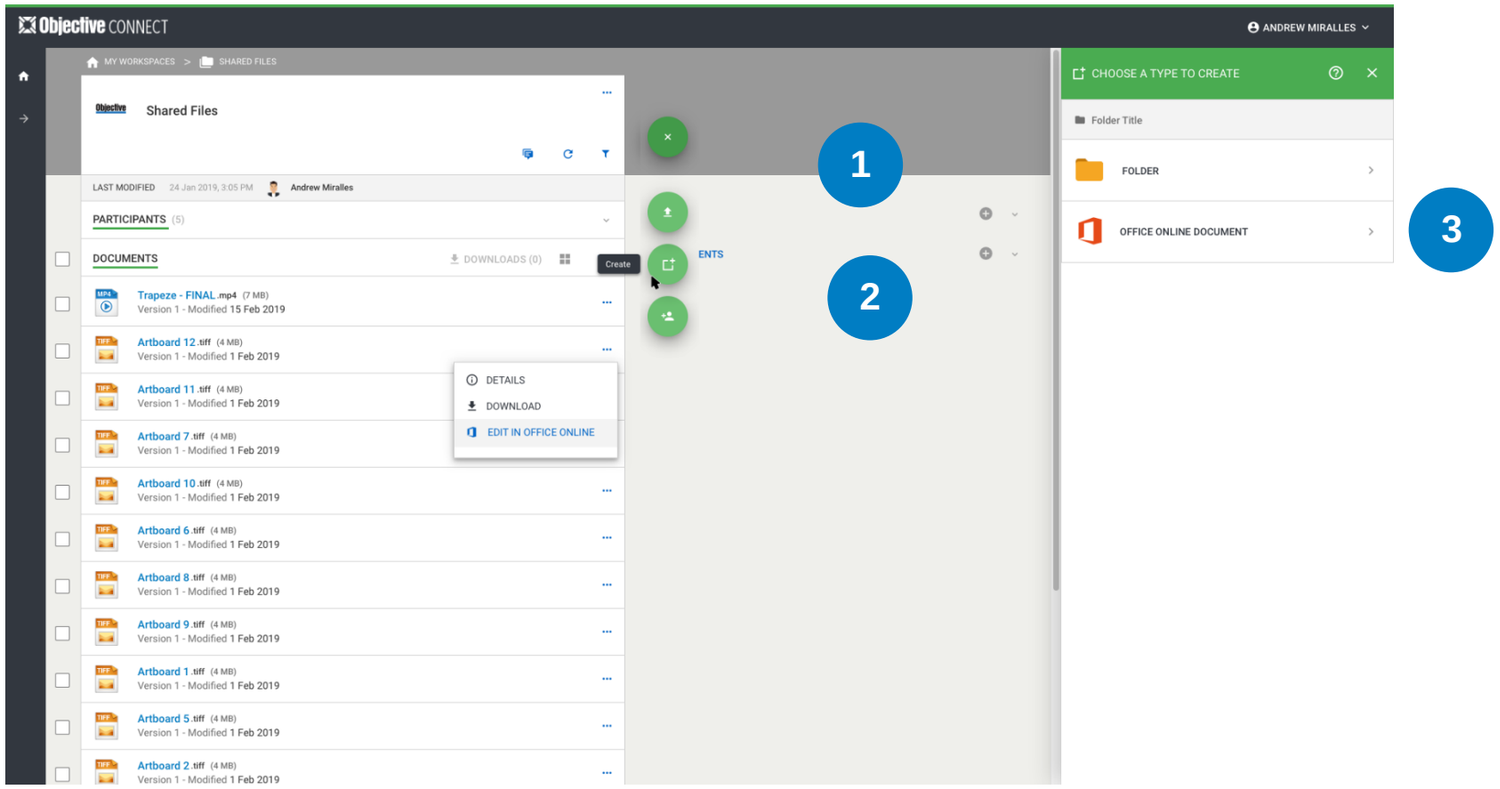
To Create Online:

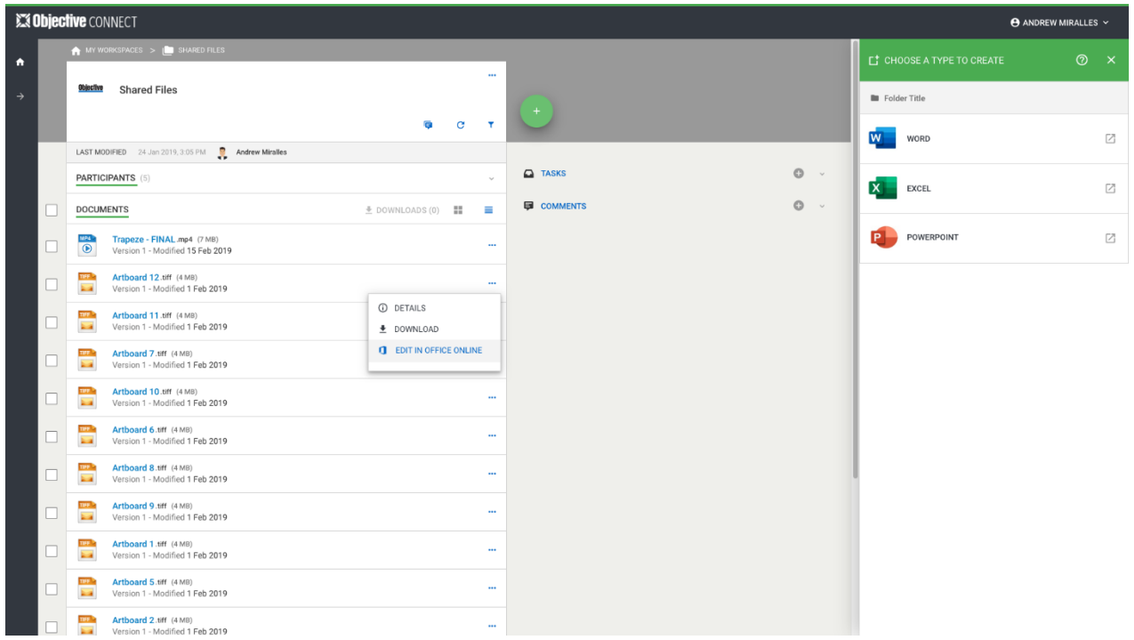
1. Click on the green action button
2. Select “create”
3. Select “Office Online Document”
4. Select your Office document (Word, PowerPoint of Excel)

The new document will open up in a new tab. The document autosaves and once you have finished work on it, simply close the tab, which will return you back to Connect, where the document will sync into the Workspace.

If you do not have permission to edit a document within the Workspace, the Secure Online Edit button will not be visible.

Click here for additional information on Secure Edit Online





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Using Annotations

Objective Connect gives you the ability to add annotations to Microsoft Office documents, Abode PDF documents and images.

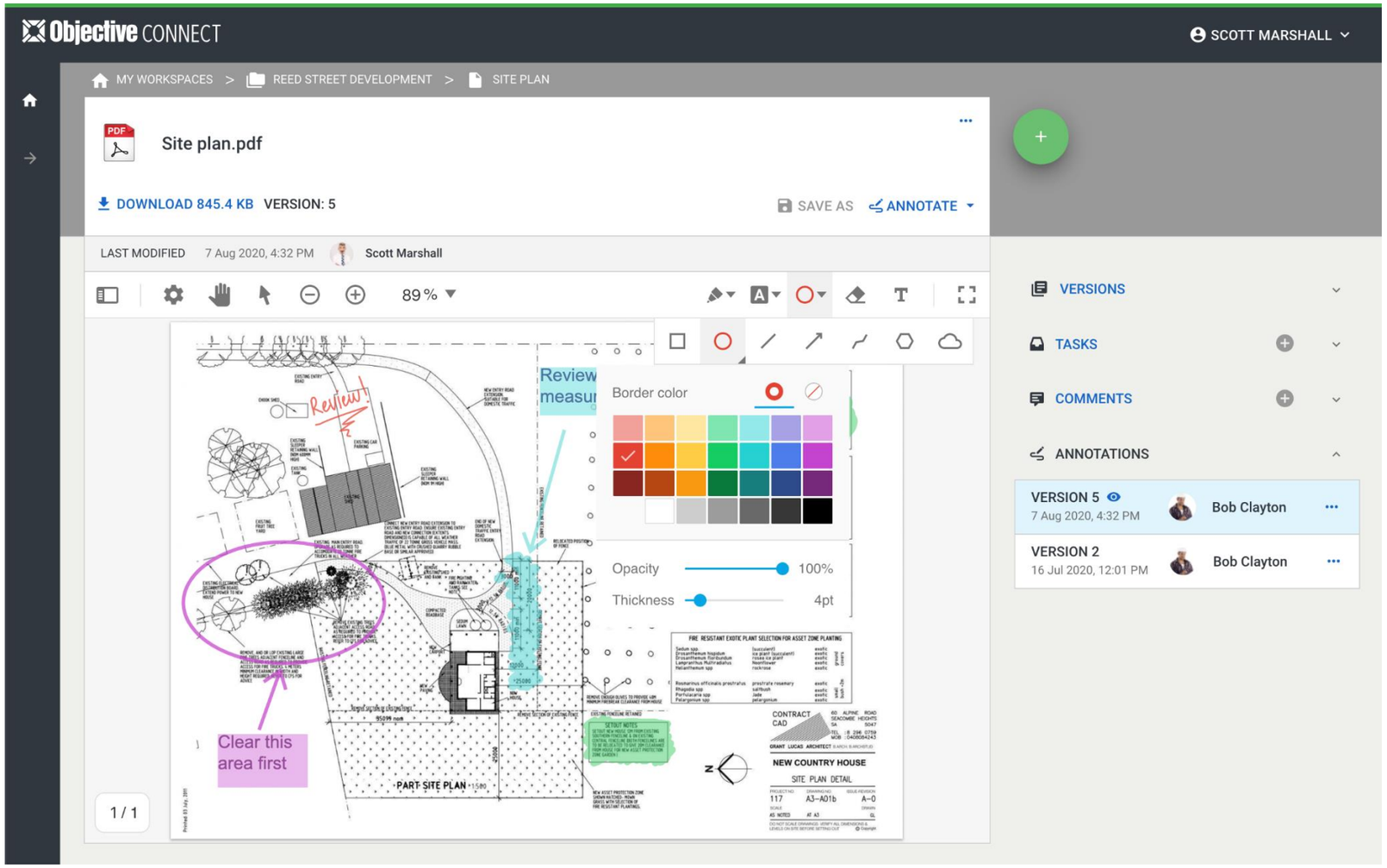
You can use different annotation tools such as freehand drawing, text highlight, drawing shapes and text boxes to make your notes on documents.

For example, if you want to prepare for a board or committee meeting, you can add your annotations as 'margin notes' for your reference.

Annotations can be set as either **public** or **private**. Only you can view your private annotations and all participants can view public annotations.

Click here for detailed instructions on how to add, view and save annotations.

Note: You can use the annotations feature only if it is enabled for you.



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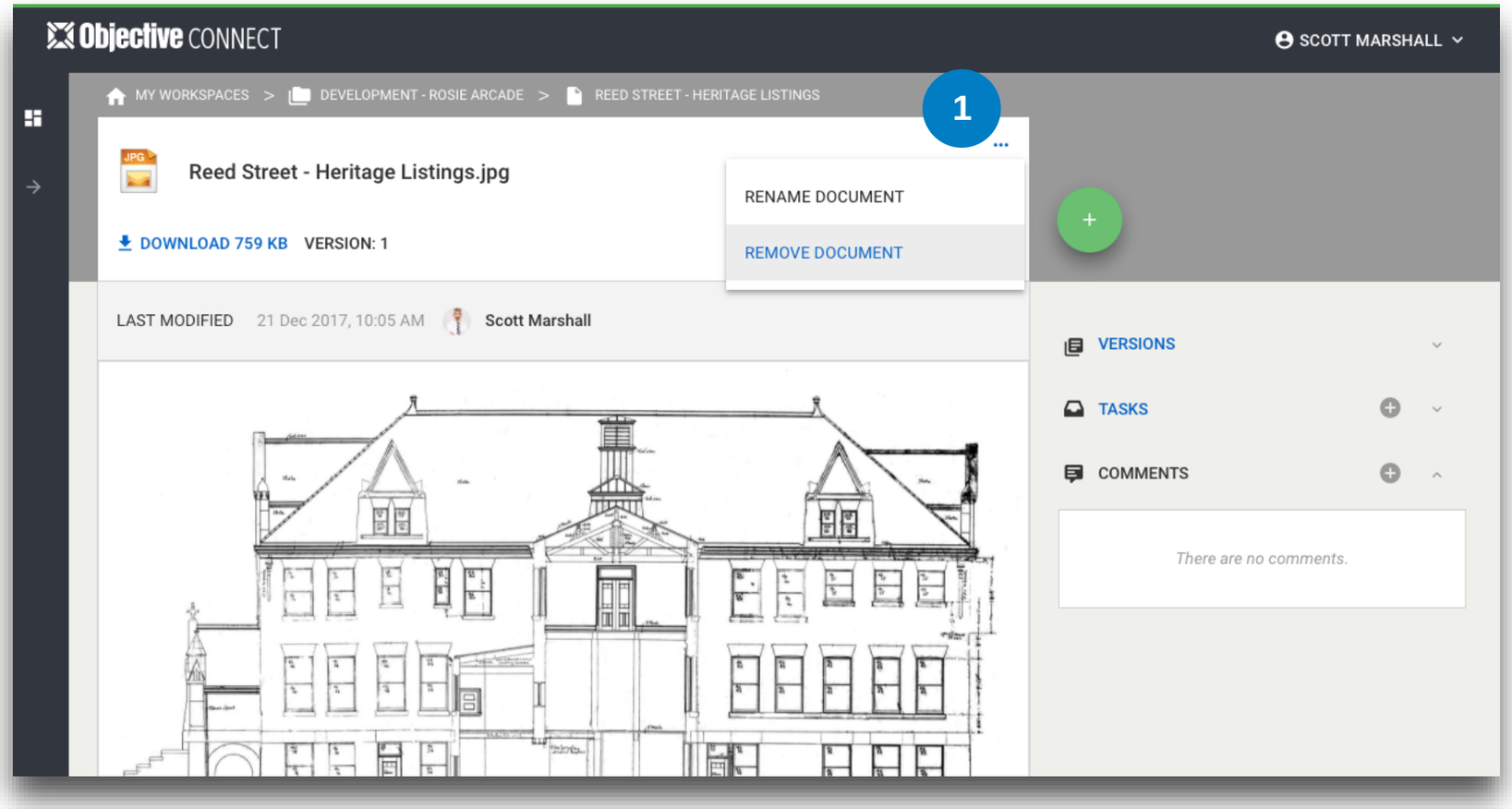
Deleting Documents

To delete a document click the name of the document. A new page will be launched:

1. Click the **… menu** and select **Delete Document**.

If you do not have permission to delete documents within the Workspace, the Delete button will not be visible.

Note: If you have integrated Objective Connect with a Document Management System, the Delete button will not be available. If this is the case you will need to delete the document in your Document Management System.



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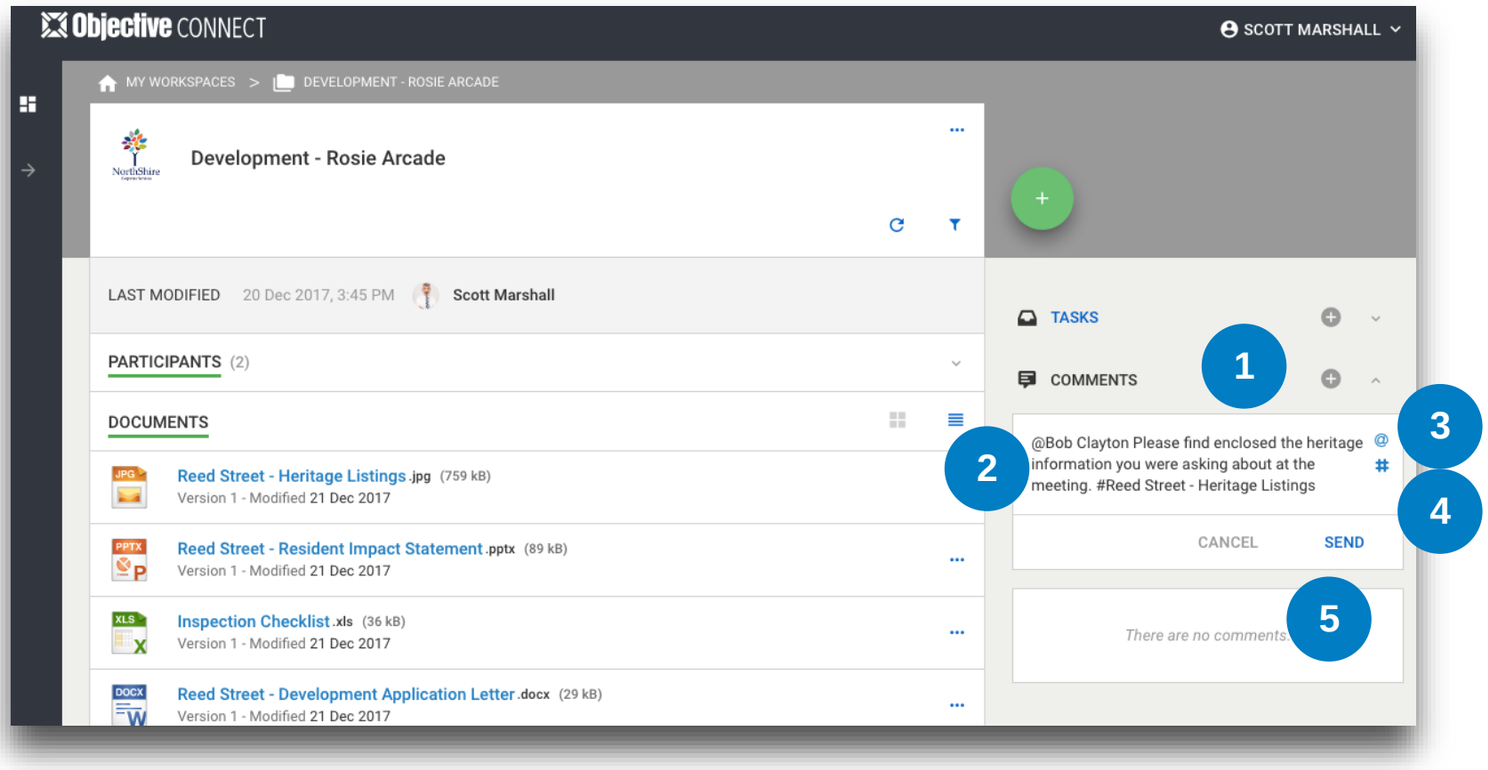
3. CAPTURE CONVERSATIONS

Commenting, Mentioning and Referencing

When collaborating on a project or process, conversations can provide additional valuable context to the work being completed. Objective Connect gives you the ability to capture the conversation within the Workspace using Comments.

After selecting a Workspace, Folder or File you wish to comment on:

1. Click on the **+ Comments icon**.
2. Type your comment into the message box.
3. To mention or direct a comment at a participant **use the @ sign**. By mentioning a participant, they will also immediately be sent an email notifying them of the conversation. To alert everyone in the Workspace use **@Workspace**, which is the Broadcast Comments feature.
4. To reference a file in a comment, **use the # sign**.
5. Click **Send** to post the comment.
6. Click on the link in a comment to go directly to the referenced file.



If you do not have permission to add comments, you will receive a message, stating you do not have access when clicking the Post Comment button.

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4. MANAGING TASKS

Managing Tasks

To **complete a Task**:

Click on the relevant action button: Review / Approve / Reject / Acknowledge:

1. Enter a comment in the message box.
2. Click the action button to complete the task.

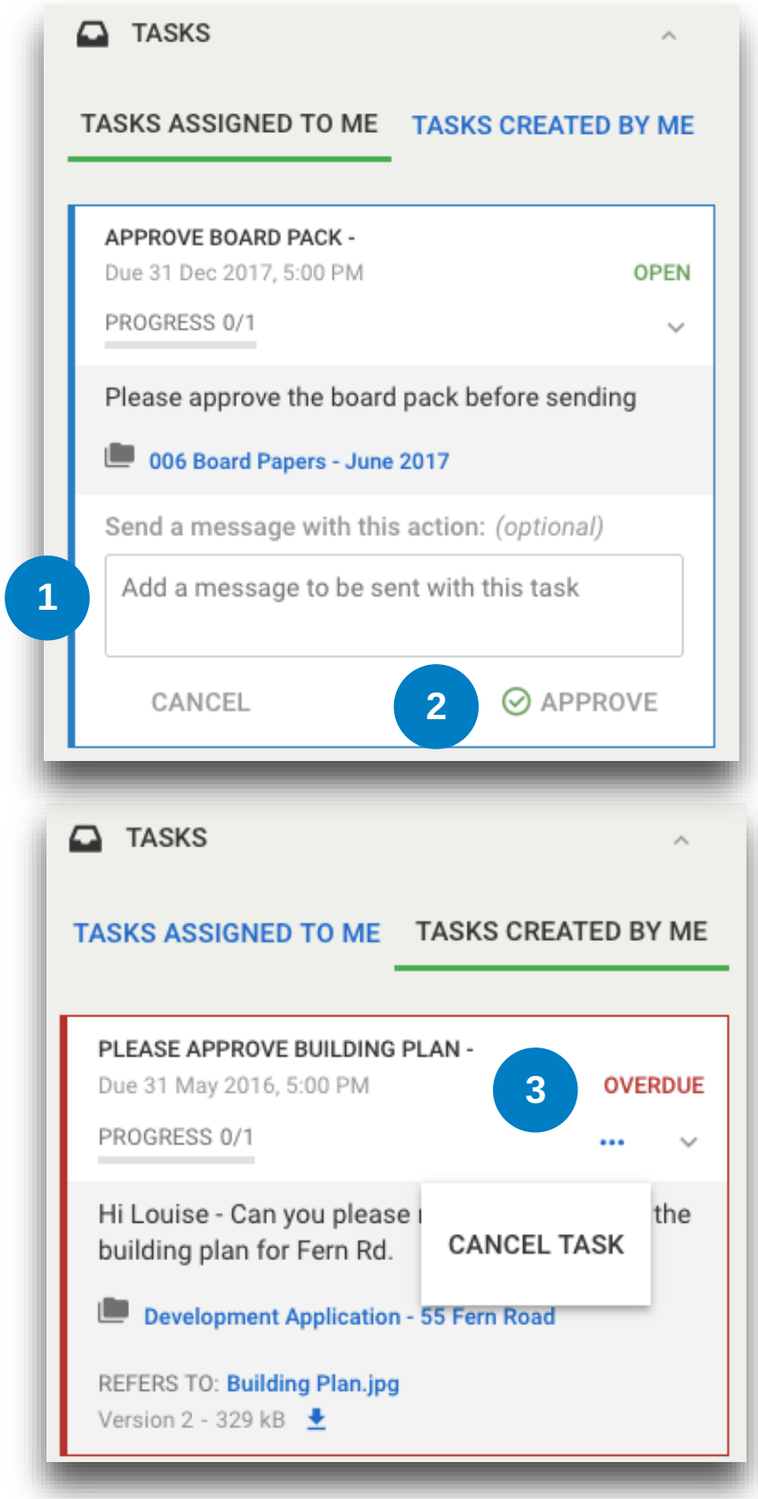
The Open icon will change to a Completed icon when the Task has been actioned.

To **cancel a Task**:

Tasks cannot be amended or deleted once they have been allocated to a Participant. Tasks can only be cancelled by the Workspace Owner.

3. The option to Cancel is available from the … menu within the Task.

To ensure a complete audit trail, cancelled Tasks are always retained.



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5. OBJECTIVE CONNECT APP

Objective CONNECT

A secure, private Workspace, enabling you to work with anyone outside of your organisation now available on your mobile device.

Available on the App Store

Get it on Google play

Objective Connect for Mobile

- **Mobile**: Online and offline access
- **Instant**: Biometric access
- **Secure**: Application encryption
- **Manage**: Create workspaces, upload content, manage participants, capture conversations and complete tasks

Click here to download further information about the Objective Connect mobile app

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With government-grade security, Objective Connect creates secure, private workspaces in the cloud to collaborate on documents, capture conversations and control tasks.

From cross-agency collaboration, working with outsourced service providers or simply digitally engaging with customers and citizens, Objective Connect can be used to manage any process involving external parties.

Information Governance can be maintained by integrating Objective Connect with an organisation's existing document and records management system, ensuring a 'single source of truth' is always maintained, even when working with external parties.

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www.secure.objectiveconnect.co.uk

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About Objective Corporation

Objective creates information and process governance solutions that are effortless to use and enable organisations to confidently advance their own digital transformation.

Designed for regulated industries, these solutions turn the imperative of compliance, accountability and governance into an opportunity to streamline business processes and deliver the innovative services that customers expect.

With a heritage in Enterprise Content Management (ECM), Objective's expanded solutions extend governance across the spectrum of the modern workplace; underpinning information, processes and collaborative workspaces.

Through a brilliant user experience, people access the information they need to progress processes from wherever they choose to work.

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