



GETTING STARTED FOR  
WORKSPACE OWNERS  
YOUR GUIDE TO OBJECTIVE CONNECT  
FOR OBJECTIVE ECM





## Secure external collaboration.

### Key Features

- Secure, Private Workspaces
- Collaborate on Documents
- Capture Conversations
- Control Tasks
- Government Grade Security
- Seamless user, permission and document integration your EDRMS

### 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.

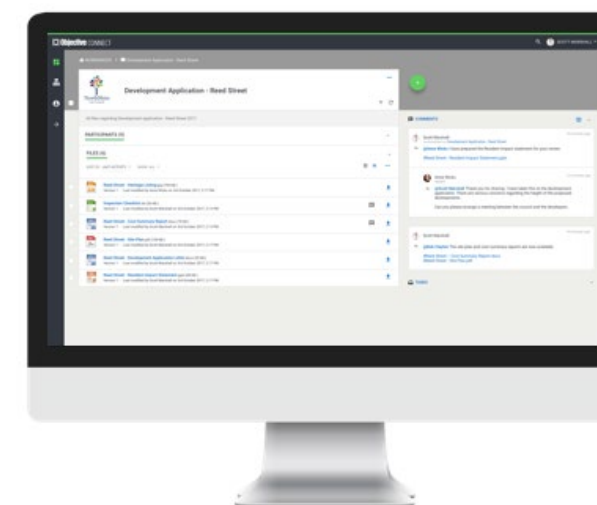
Because it can be used to manage any business process, Objective Connect enables digital transformation – removing the need for paper, email, thumb drives, DVD's and rogue or shadow IT.

### About This Guide

The following Guide is designed to enable you to get started as a **Workspace Owner** for **Objective Connect with Objective ECM**.

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

If need further assistance please go to the Objective Connect Help Centre at [help.objectiveconnect.com](https://help.objectiveconnect.com)



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3. Create a Workspace from ECM
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7. Control Tasks
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# 1. KEY CONCEPTS

# Workgroups

Each Objective Connect subscription comes with at least one Workgroup. Team members that require the ability to collaborate with internal and external parties are added to the Workgroup. Once added, the team member can create secure, private workspaces where they can collaborate on documents, capture conversations and control tasks. All team members who have been added to the Workgroup have one of the following roles:

- **Members:** Can create and manage their own Workspaces.
- **Administrators:** Can also add or disable Members, manage connection consumption, transfer ownership of Workspaces and produce audit trail reports.

**Note:** If an organisation has an Enterprise Objective Connect subscription, it enables them to have separate Workgroups for individual departments or business units with differing collaboration needs.



# Workspaces

When a Member creates a Workspace, they are known as a **Workspace Owner**.

Anyone who is invited to collaborate on content within a Workspace is simply known as a **Participant**. The actions that a Participant can perform is assigned per Workspace that they are invited to.

# Connections

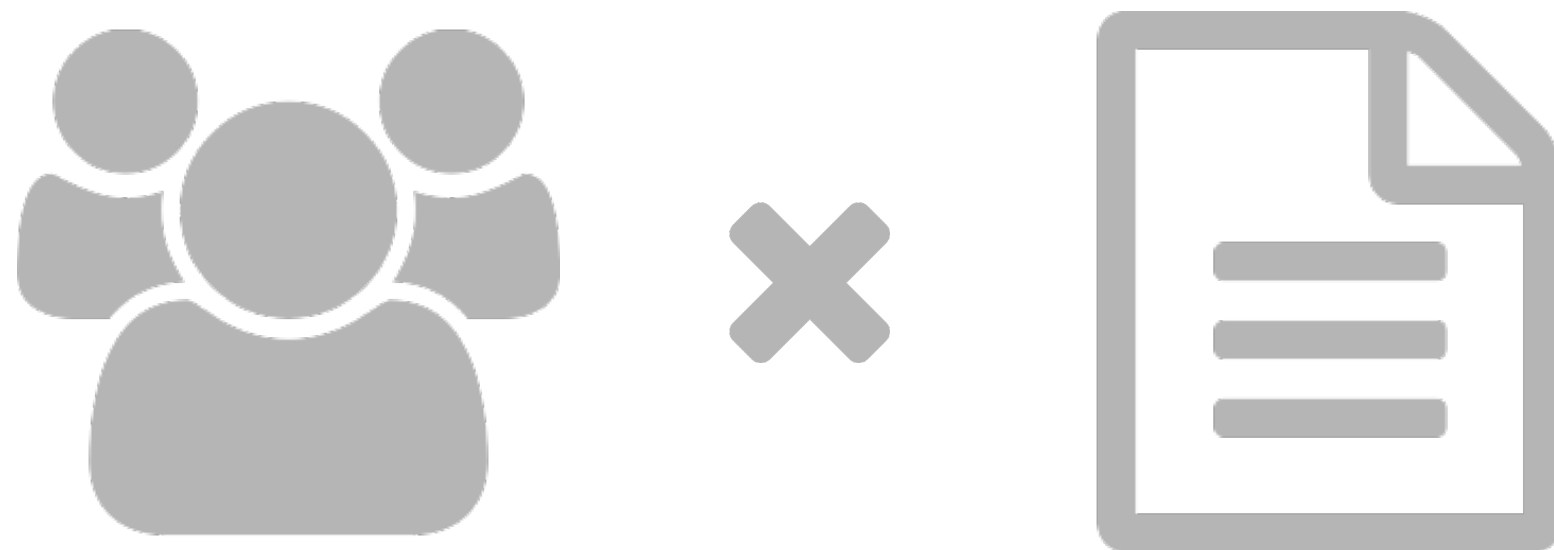
Connections are the **unit of currency** within Objective Connect. Connections are calculated according to the number of documents uploaded to each Workspace and the number of parties (Workspace Owners and Participants) who are able to see them.

- Documents x Parties = Connections

When an organisation subscribes to Objective Connect, the **edition denotes the number of Connections available** in the Workgroup.

- 1 Document x 2 Parties = 2 Connections
- 10 Document x 2 Parties = 20 Connections
- 1 Document x 20 Parties = 20 Connections

**Connections can be recycled** by either removing participants from a Workspace, by deleting documents or ending a Workspace.



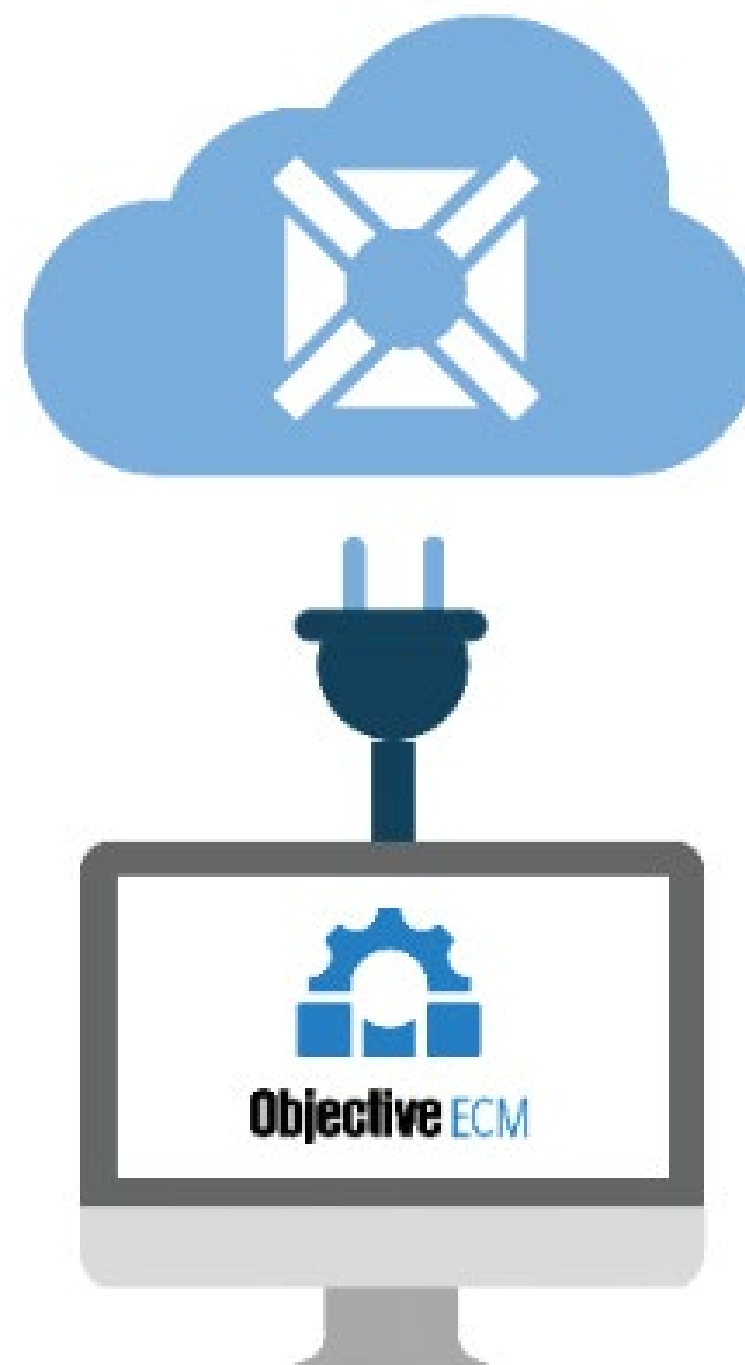
# Connect Link

Objective Connect can be seamlessly integrated with Objective ECM. This **integration is known as Connect Link**. This integration ensures that Objective ECM remains the single-source-of-truth, even when working with external parties.

With a simple right-click from within Objective ECM, the content of a folder or file is **automatically synchronised** with an Objective Connect Workspace.

Before a document is shared externally the permission and life-cycle information within Objective ECM is always checked, ensuring **restricted information never leaves** your organisation.

Every document uploaded and every document version updated in Objective Connect is automatically synchronised with the folder or file in Objective ECM, with a complete record **updated** in the **Objective ECM audit trail**. Similarly, any document added to the Objective ECM folder is automatically synchronised with the Objective Connect Workspace.



## 2. NAVIGATION

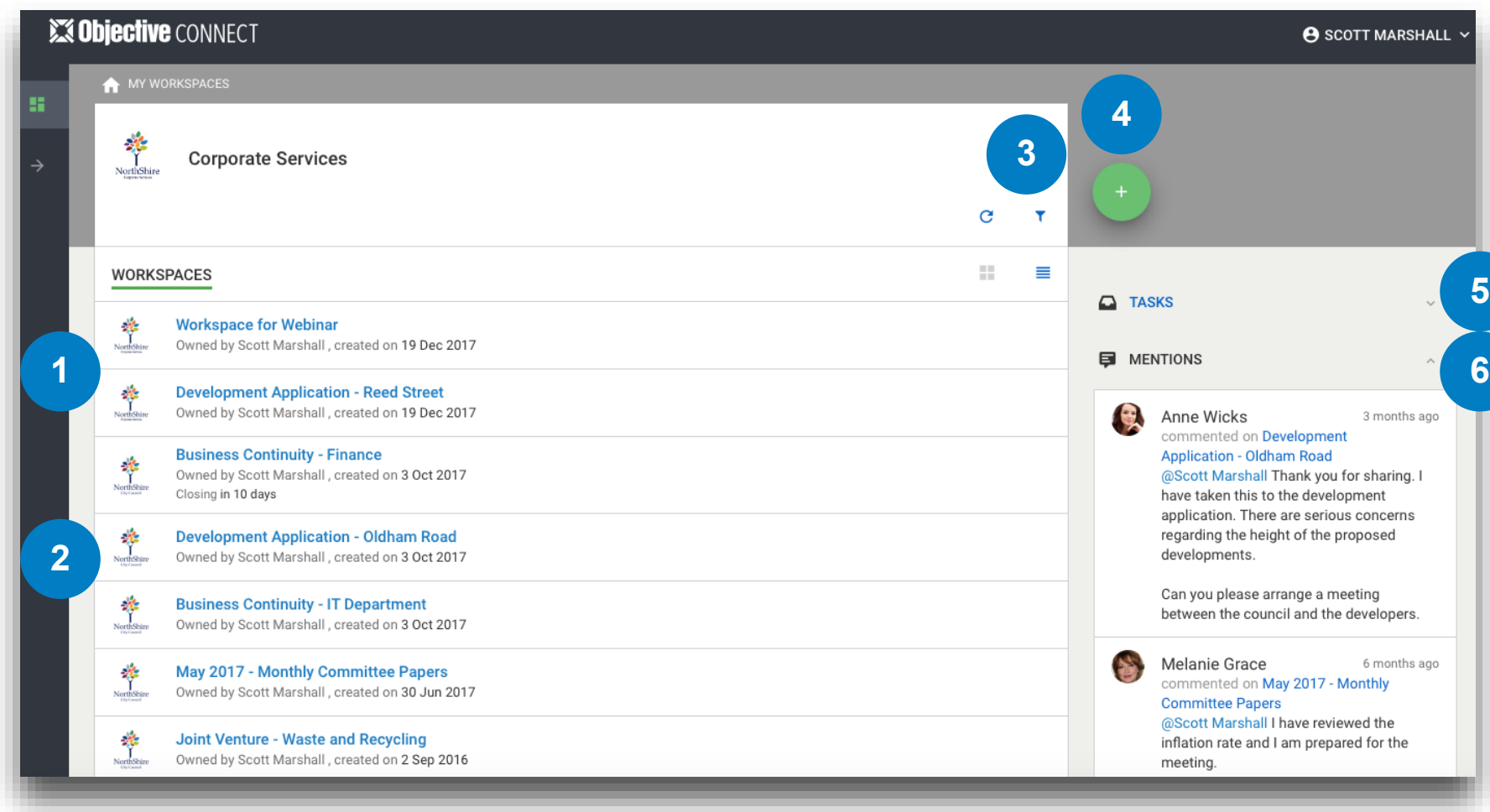


# Getting Started

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:

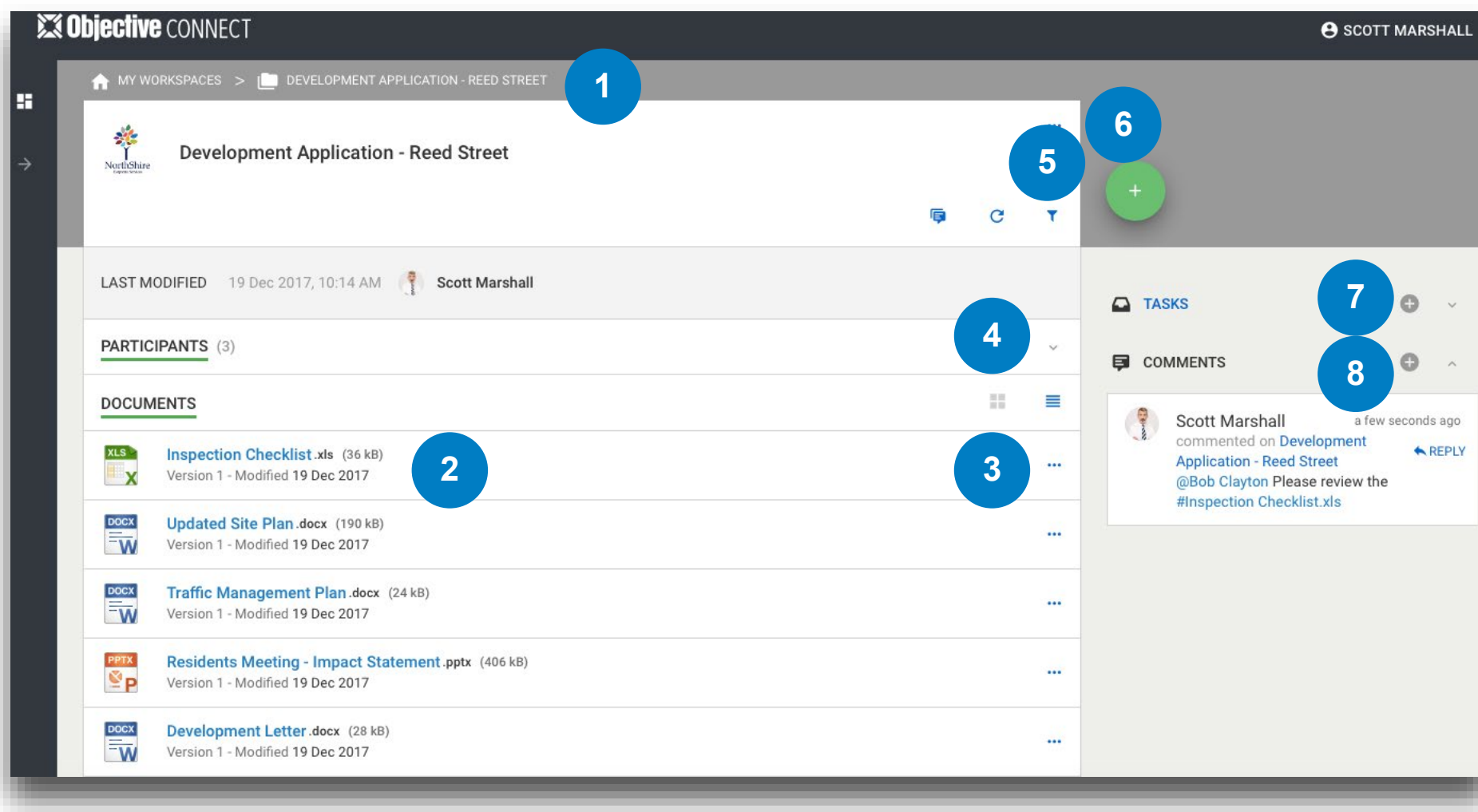
1. **View all of the secure Workspaces** that you have created or been invited to.
2. Click on the Workspace name to **view the contents** of that Workspace.
3. Click the filter icon to **filter and search** the Workspaces that you have been invited to.
4. Click on the + icon to **create a new Workspace**.
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.



# Navigation

In each secure, private Workspace you can:

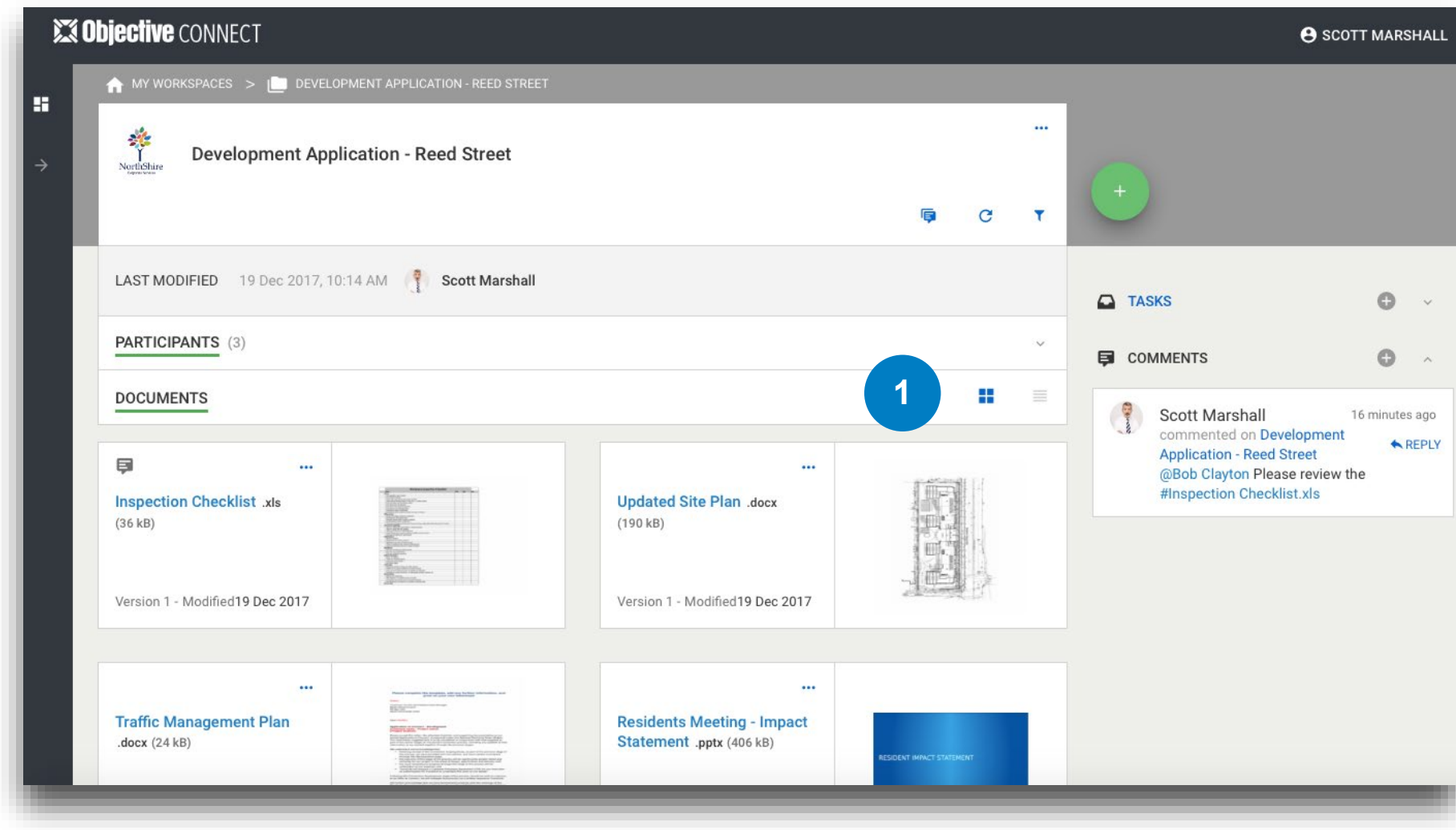
1. Use the navigation links to move **backwards and forwards** in the Workspace.
2. **Preview documents** by clicking on the document row.
3. Download a document - click on the **... menu**.
4. Click the **∨ menu** to view current or invite additional **Participants** to the Workspace.
5. Click the **filter** button to search for files and to sort files by criteria such as date and name.
6. **Add documents** or Folders by clicking on the **+ icon**.
7. View and complete **Tasks** that are assigned to or created by you.
8. Add and view comments.



# Switch to Thumbnail View

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.



# Update your Settings

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

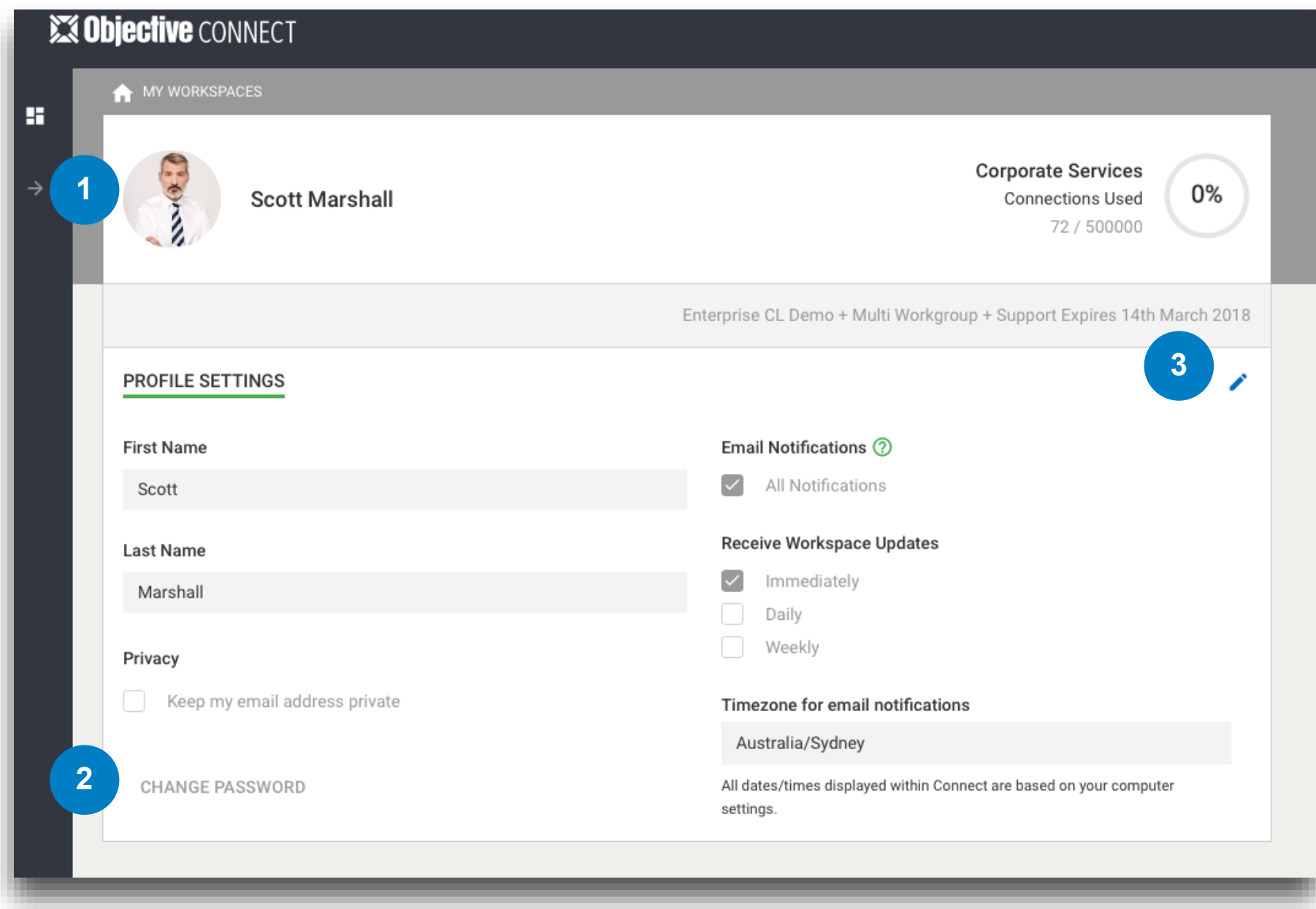
This photo will be used whenever you make a comment or are involved in a Task. Your photo will also be used in notification emails being sent to other users when you complete an action such as accepting an invitation to join a Workspace.

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**.



## 3. CREATE A WORKSPACE FROM ECM - NAVIGATOR

# Creating a Workspace - ECM Navigator

Workspaces can be created from ECM Navigator

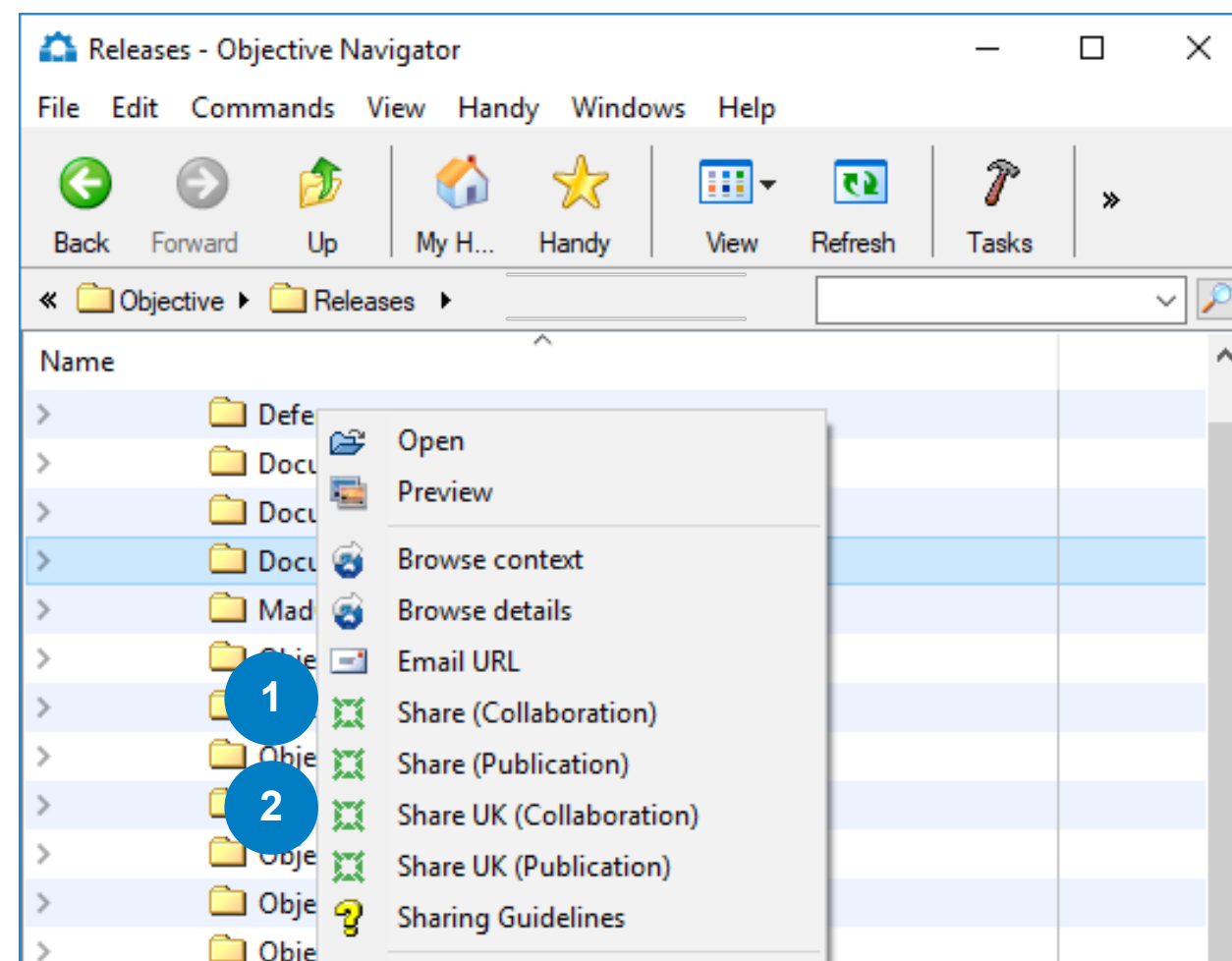
A user who has been given the appropriate ECM permission and has been added as a Member to a Connect Workgroup, can simply **right click on a folder or file** within ECM and either select Collaboration or Publication to create a new Workspace in Objective Connect (depending on configuration these names can change). The contents of the **folder (and subfolders)** will be synchronised with the Workspace in Objective Connect:

1. **Collaboration:** Selecting Collaboration, will synchronise all documents in the folder, even if they have a status of Draft.
2. **Publication:** Selecting Publication will only synchronise documents that have a status of Published.

Depending on the security configuration of Objective ECM, you may be asked to enter your Objective ECM password.

**Note;** Before a document is synchronised, certain permissions are checked:

- **Permissions:** The permissions of the ECM user creating the Workspace will be passed through to Connect. If the user can only see and open the document in ECM, then only these permissions can be granted to external Participants
- **Caveats:** If a Caveat has been applied to a document and the user has not been added to the caveat, the document will not sync.
- **Security Classification Level:** If a security classification level has been applied to a document that blocks external use, the document will not sync.



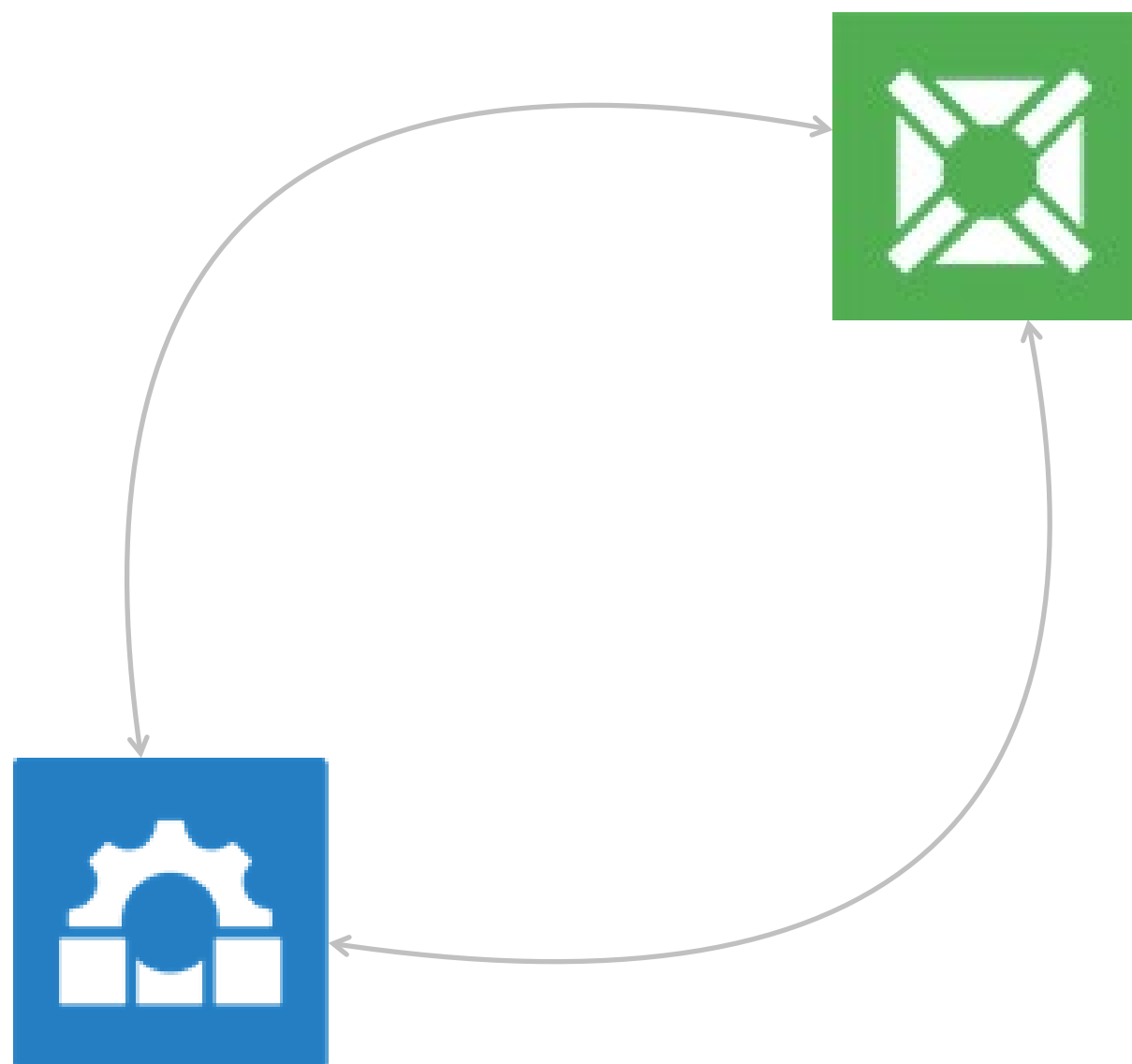
# Synchronised content

Once a folder within Objective ECM has been synchronised with Objective Connect, any content that is added or removed from the ECM folder will automatically be reflected in Connect.

For example if a new document or an aliased document is added to the synchronised folder it will automatically appear in Objective Connect, as long as the document permissions allow it.

Similarly all documents that are removed from the ECM folder will automatically be removed from Connect.

If a Participant adds a document into Objective Connect it will automatically appear in the Objective ECM folder.





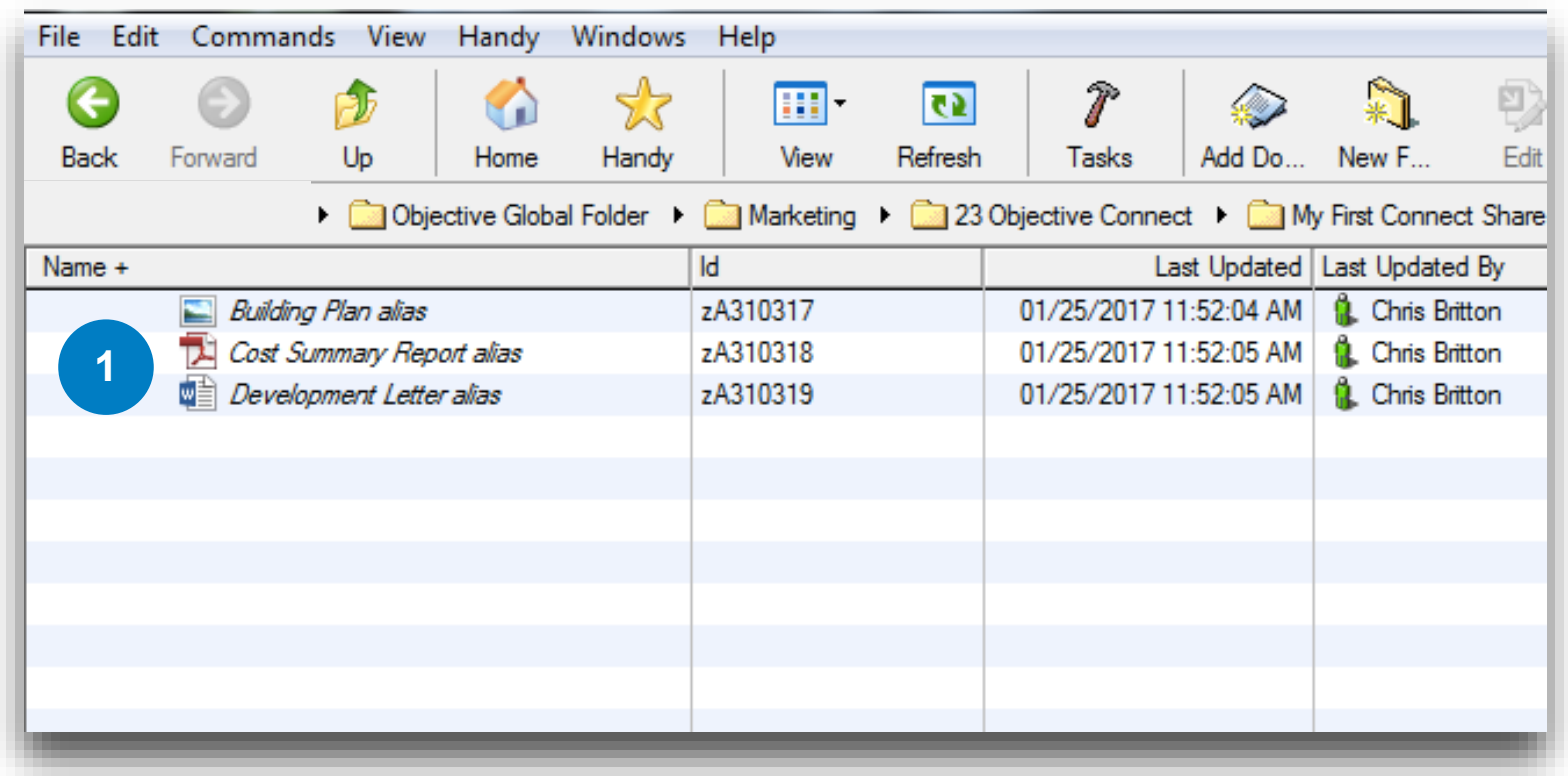
# The Benefits of Sharing Aliased Documents

When collaborating with external parties, it may not be appropriate to share all of the documents stored within a folder or file in ECM. It is recommended that specific folder be created for a collaboration event and only documents that have been ‘aliased’ are shared.

- 1. Documents that have been aliased have their Name in **italics**.

Sharing an aliased document delivers the following benefits:

- Only appropriate documents are ever shared.
- Documents added by external parties are not automatically added to inappropriate locations in ECM (they can be moved at a later date).
- Documents that no longer need to be shared, can be removed from Connect without impacting the originals.
- If the collaboration event needs to end, the entire folder or file can be deleted in ECM, without deleting the original documents.





# How to invite a Participant

To allow other people, internal and external to your organisation, to start collaborating within your Workspace, you will need to add them as Participants.

When you have selected the type of Workspace you wish to create, Objective Connect will launch the Invite Participant blade will be visible

1. **Invite** multiple participants by using their valid email address.
2. **Control the actions** each participant will be able to perform by clicking on the icon to the left of each option.
3. **Type a message** in the message box. Invitees will receive this by email.
4. Click on the **Send Invitations** button to complete the invitation.

Once a Participant has accepted your invitation, their status will show as 'Accepted' on your Participants list.

**INVITE PARTICIPANTS:**

INVITE PARTICIPANTS TO:  
Development - Rosie Arcade

Invite participants:

joe.doe@mail.com ✕ jane.dow@mail.com ✕

Participants will be able to:

- add documents
- create folders
- edit and delete documents ⓘ
- invite and remove participants
- post comments
- participants will be hidden from others

Add a message to be sent with this invitation: *(optional)*

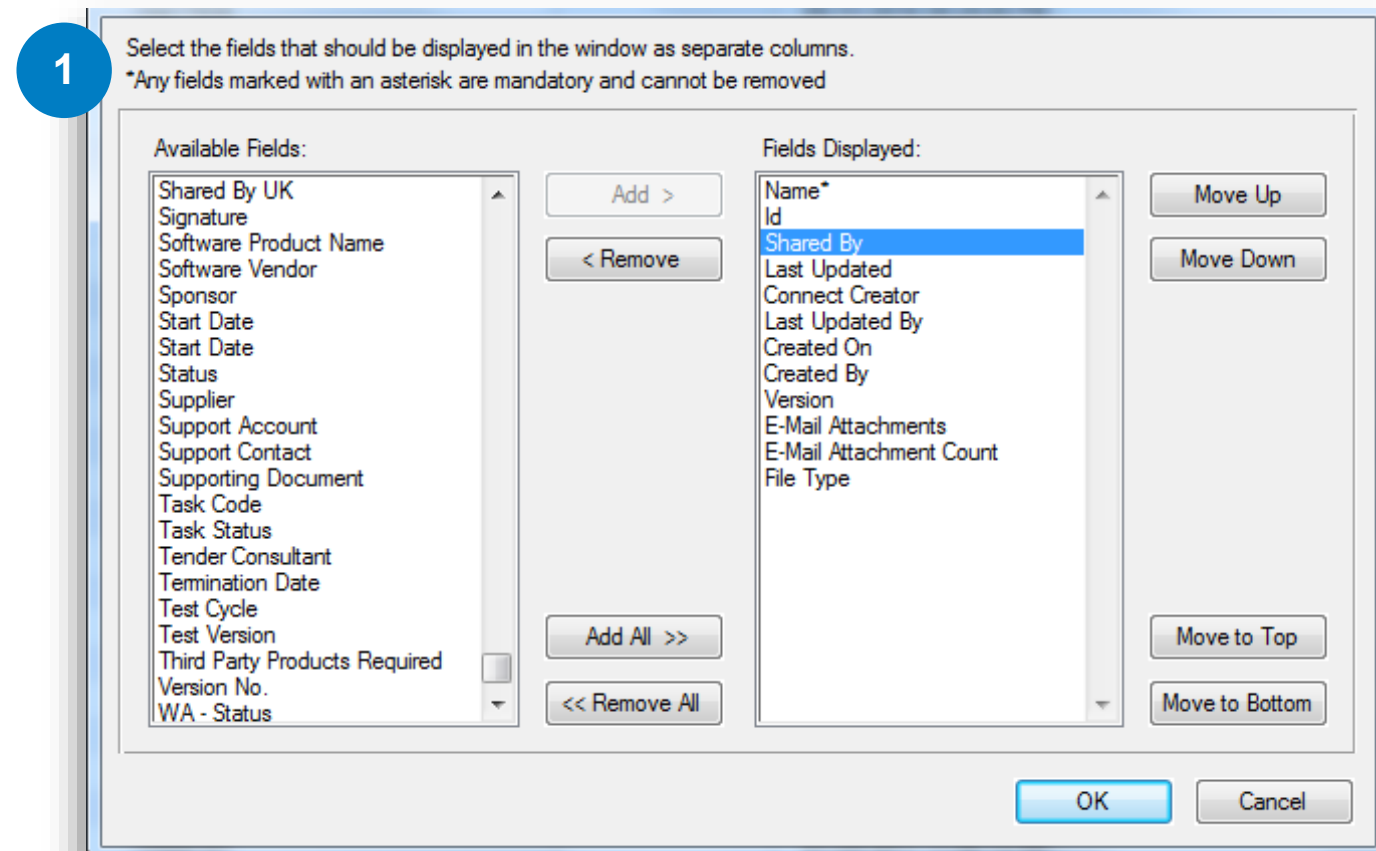
add a personal message to send to the participants

**4 SEND INVITATIONS**

# 'Shared By' in ECM

To see if a folder within Objective ECM has been synchronised within a Workspace in Objective Connect, a user can display the '**Shared By**' catalogue field to the grid in Objective ECM.

1. To display the catalogue field, right click in Objective ECM and select **Show Columns**. Scroll through Selected Fields, highlight 'Shared By' and click the 'Add' button.
2. Once the field has been added it will display the **user who has synchronised the folder**.



Name +	Id	Shared By	Last Updated	Corr
My First Connect Share	fA522102	Chris Britton	01/25/2017 04:16:23 PM	
Completed Work	fA522125		01/25/2017 03:07:08 PM	
Building Plan alias	zA310317		01/25/2017 11:52:04 AM	
Cost Summary Report alias	zA310318		01/25/2017 11:52:05 AM	
Development Letter alias	zA310319		01/25/2017 11:52:05 AM	

## 4. CREATE A WORKSPACE FROM ECM - BROWSER

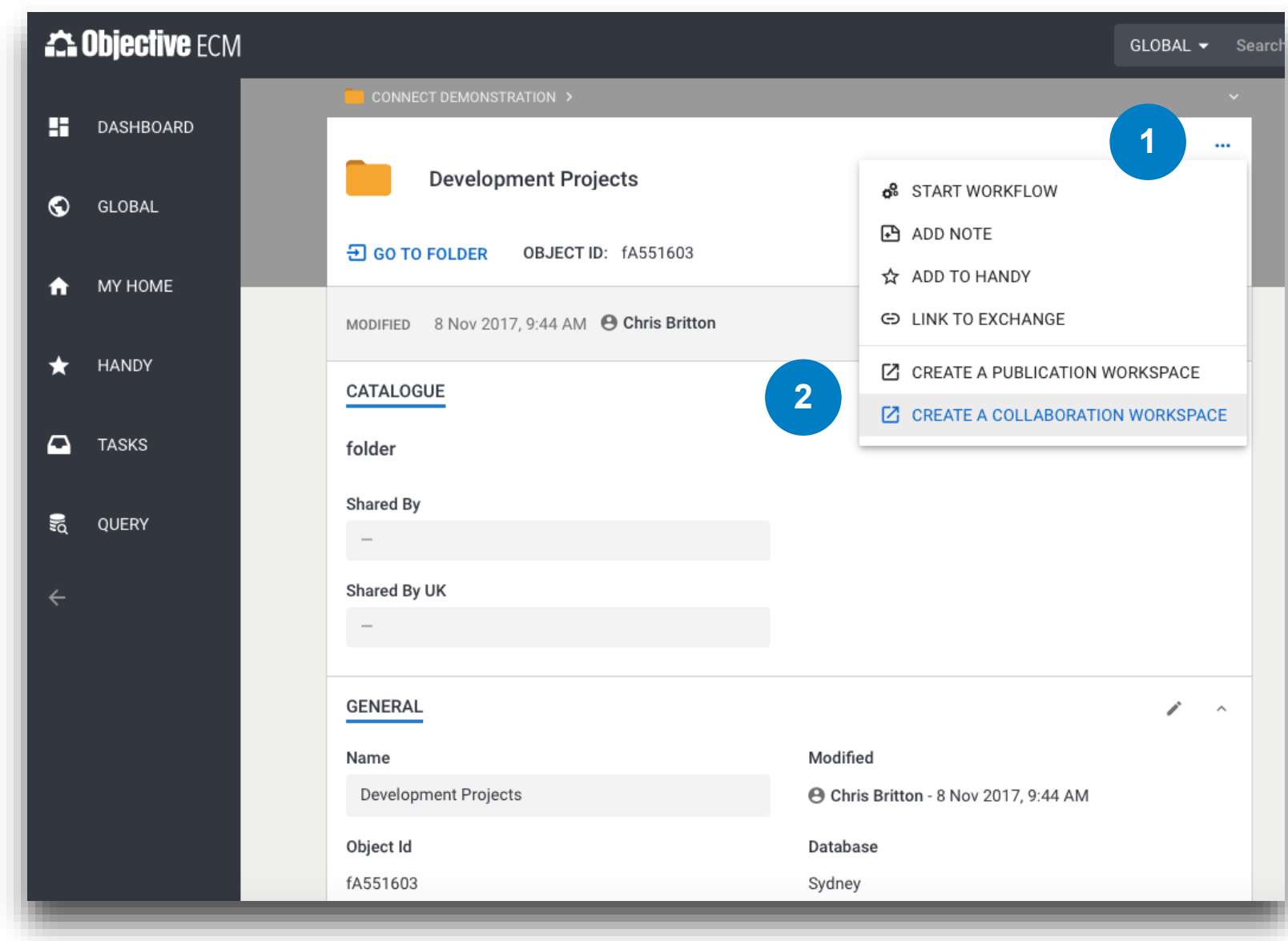
# Creating a Workspace - ECM Browser

Since the release of Objective ECM 10.4, there is now the ability to create Workspaces from ECM Browser.

A user who has been given the appropriate ECM permission and has been added as a Member to a Connect Workgroup, can simply:

- 1. Click the **... Menu** on a folder
- 2. Select with **Publication** or **Collaboration Workspace**.

As detailed in the creation from ECM Navigator section of this guide, depending on the security configuration of Objective ECM, you may be asked to enter your Objective ECM password. Also, all permissions, caveats and classifications are checked.



## 5. CREATE A WORKSPACE FROM CONNECT

# Create a Workspace from Connect

Objective Connect makes it easy to collaborate on content outside of your organisation within a secure, private Workspace. Within the Workspace you can collaborate on documents, capture conversations and control tasks.

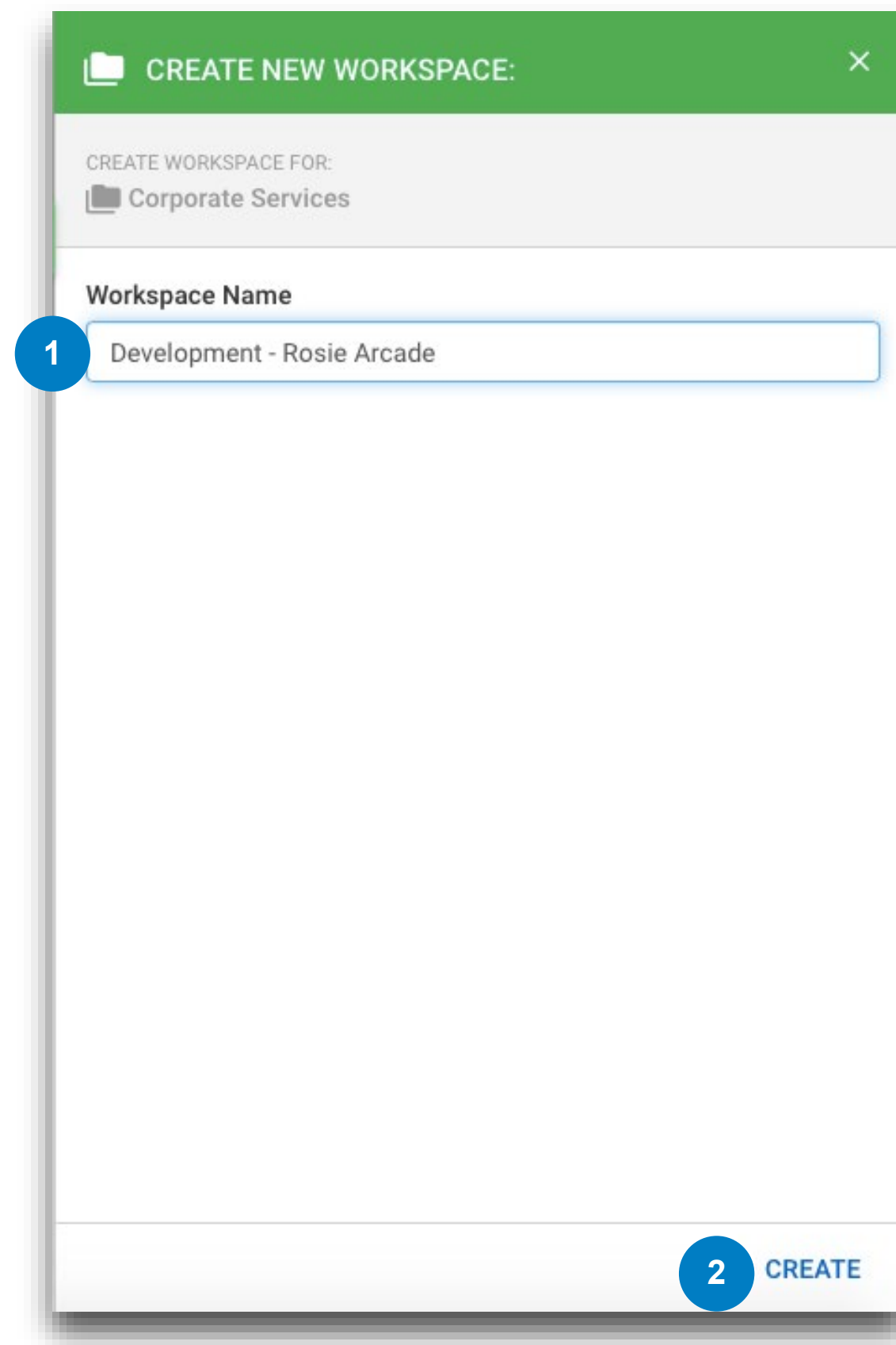
From the main dashboard click the green + icon and a blade will appear from the left hand side of the screen.



1. Type in the **name** of **your Workspace**.
2. Click on Create.

You are now ready to add files and invite participants to view, edit or comment on files you upload to your Workspace.

**Note:** Some implementations of Connect Link restrict the Workspaces to be created from Objective ECM only. If this is the case you will not see the option to create workspaces from within Objective Connect

A screenshot of a web application dialog box titled 'CREATE NEW WORKSPACE:'. The dialog has a green header bar with a close button (X) in the top right. Below the header, it says 'CREATE WORKSPACE FOR:' followed by a folder icon and the text 'Corporate Services'. The main section is titled 'Workspace Name' and contains a text input field with the value 'Development - Rosie Arcade'. A blue circle with the number '1' is positioned to the left of this input field. At the bottom right of the dialog, there is a blue circle with the number '2' next to a 'CREATE' button.

## Objective ECM 'ShareBox'

If your implementation of Connect Link does allow Workspaces to be created from Objective Connect, a synchronised folder will appear in your personal ShareBox folder in Objective ECM, each time a Workspace is created in Connect. Documents will then synchronise to this folder. The ShareBox is located in your Objective ECM Handy.

Users have the ability to then drag and drop the folder into the main file plan at a later stage, without losing the link to Connect.

Even if the folder is not moved into the main file plan of Objective ECM and the Workspace is closed, the folder will remain in the users Personal ShareBox area in Objective ECM

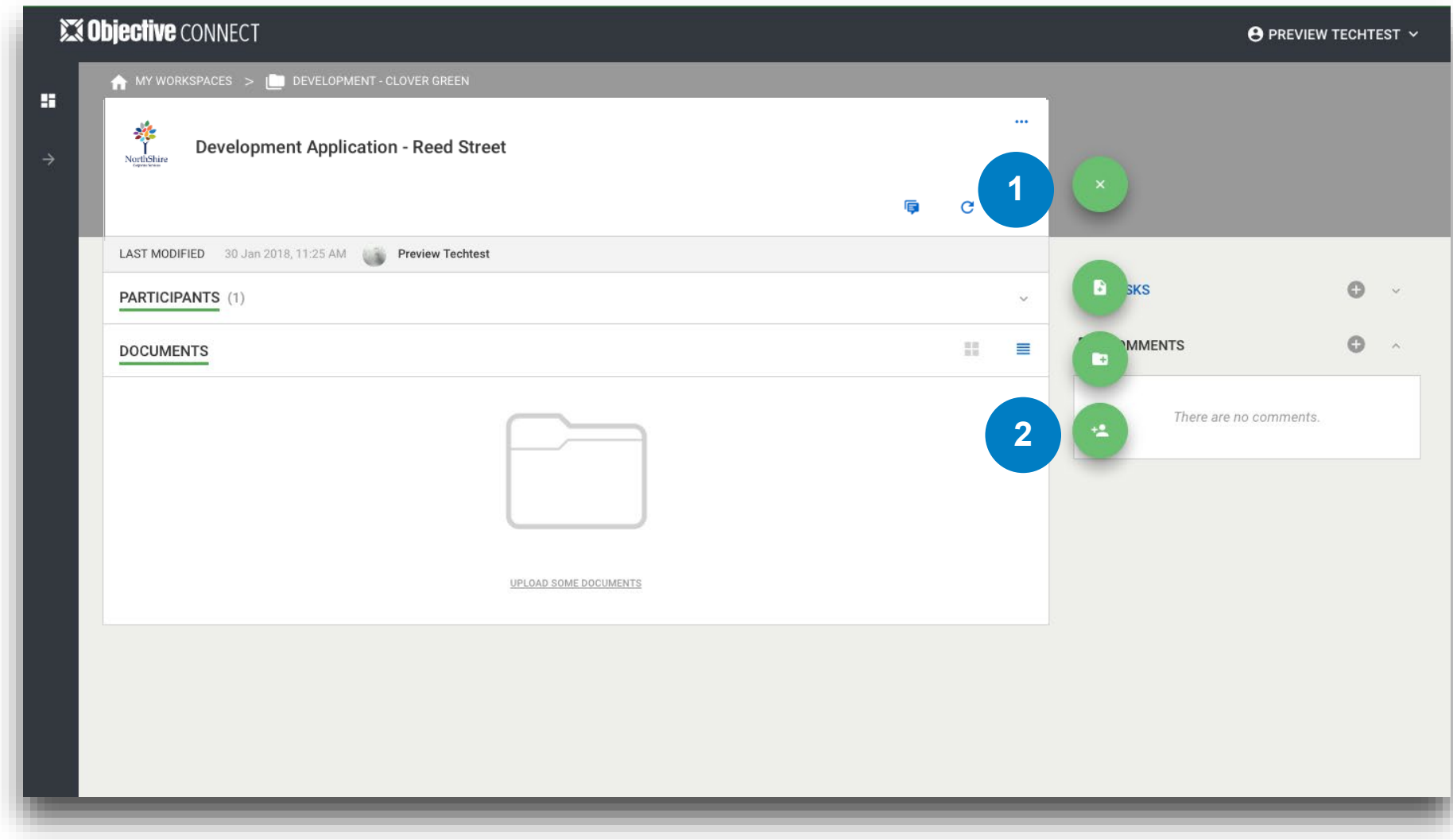


# How to invite a Participant from within an existing Workspace

To allow additional internal and external people to start collaborating within your Workspace, you will need to add them as Participants. To do this form a Workspace you have already created:

1. Click the green + icon 

2. Then click the 'Add Participant' icon 





The Invite Participants Blade will appear.



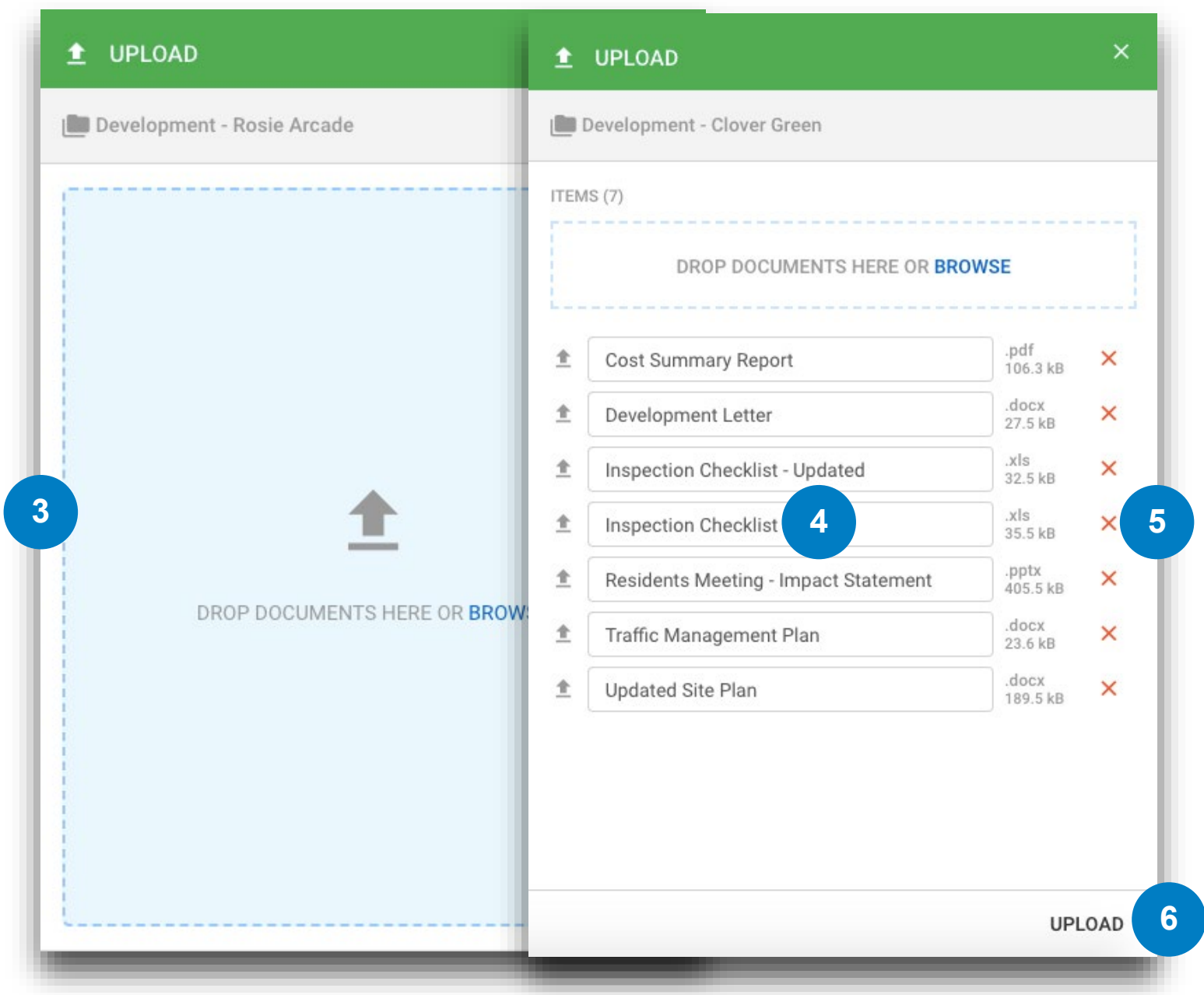
## 6. COLLABORATE ON DOCUMENTS

# Adding Documents via Connect

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.



## Adding Folders via Connect

To add folders to a workspace:

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



2. Select the Create icon.

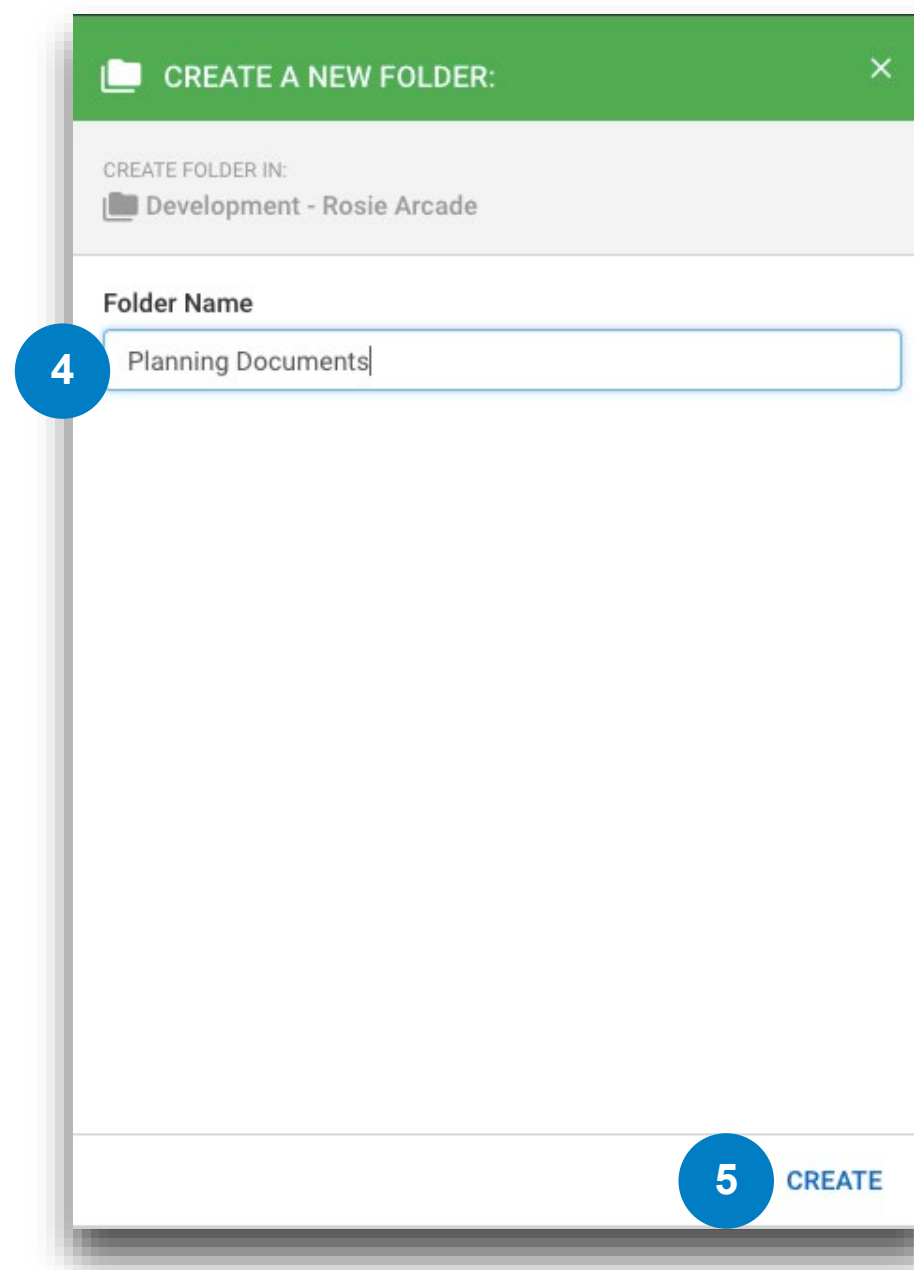


3. Select **Folder**.

4. Enter the folder name.

5. Click **Create**.

**Note:** If you have integrated Objective Connect with a Document Management System, the Folder option may not be available.

A screenshot of a mobile application interface showing a 'CREATE A NEW FOLDER' dialog box. The dialog has a green header bar with a folder icon and a close button. Below the header, it says 'CREATE FOLDER IN:' followed by a folder icon and the text 'Development - Rosie Arcade'. There is a text input field labeled 'Folder Name' containing the text 'Planning Documents'. A blue circle with the number '4' is next to the input field. At the bottom right, there is a blue circle with the number '5' next to a 'CREATE' button.

CREATE A NEW FOLDER: ✕

CREATE FOLDER IN:  
Development - Rosie Arcade

Folder Name

4 Planning Documents

5 CREATE

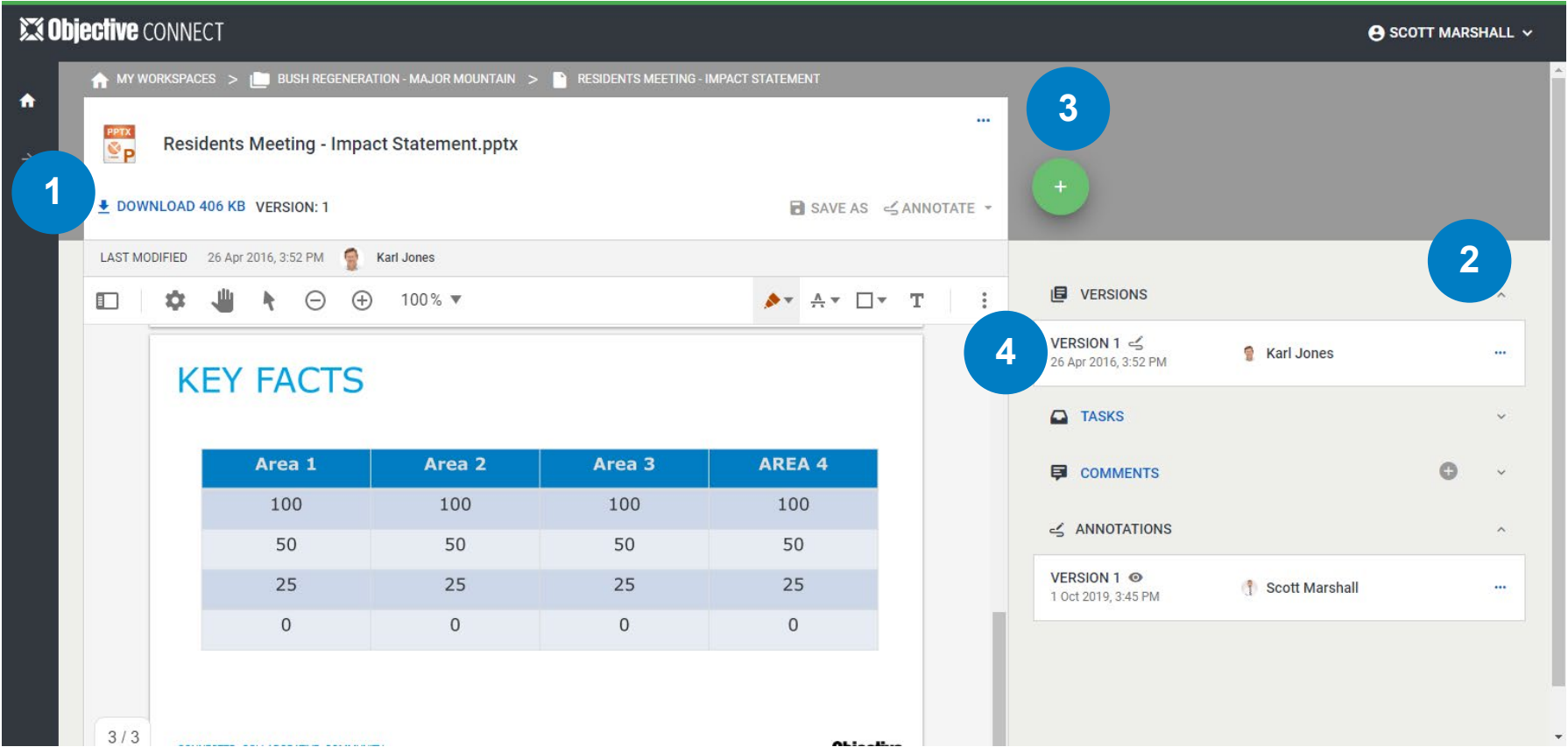
# Managing Document Versions in Connect

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. **Drag 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.

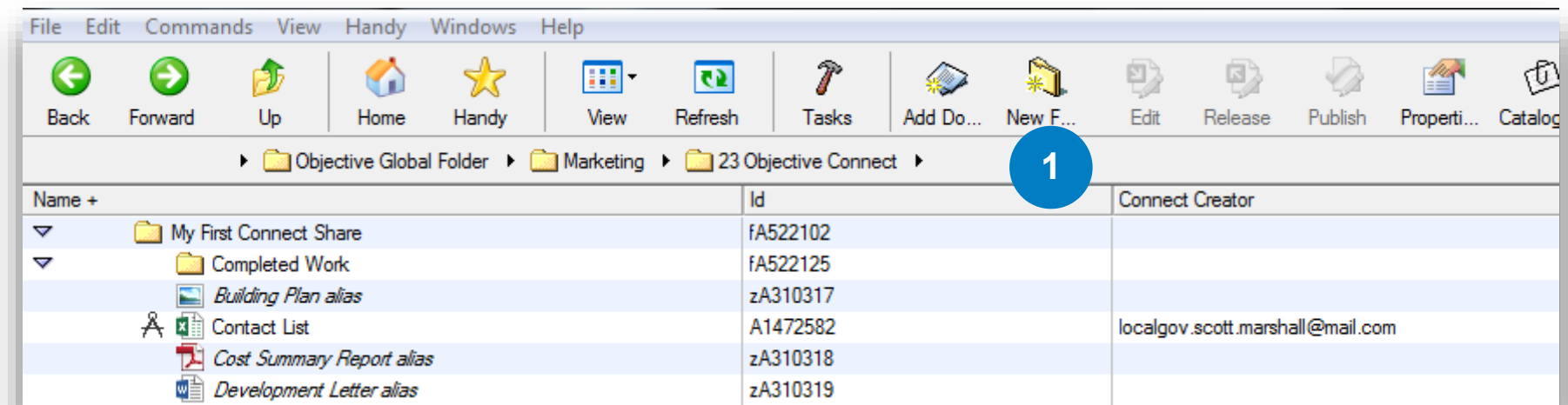
When synchronised, each update is viewed as a new version of the document in Objective ECM.



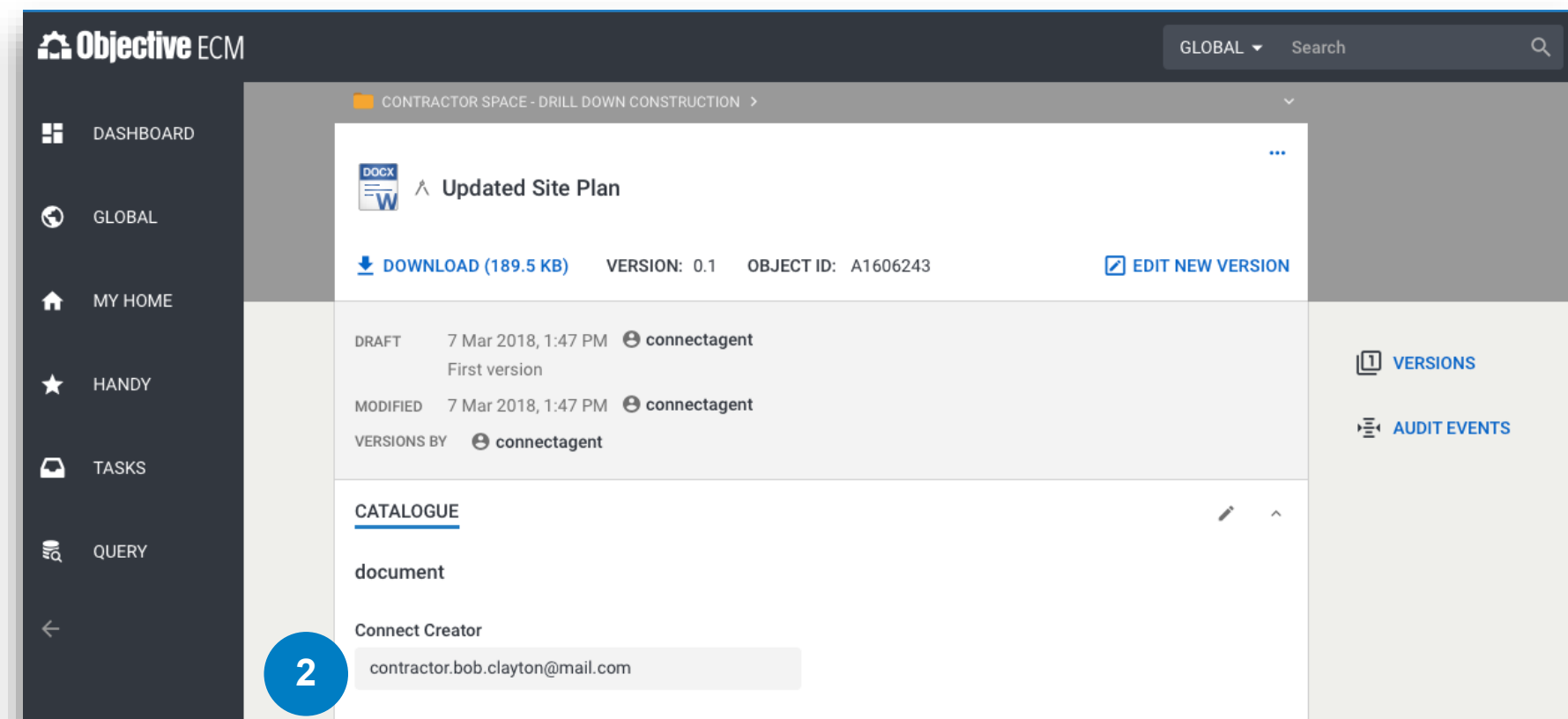
## ‘Connect Creator’ in ECM

When a document has been uploaded by a Participant via Objective Connect the ‘Connect Creator’ catalogue field is updated with the participants email address in Objective ECM

1. To display the catalogue field in ECM Navigator, right click in Objective ECM and select Show Columns. Scroll through Selected Fields, highlight **‘Connect Creator’** and click the ‘Add’ button.
2. To display the catalogue field in ECM Browser, right click in Objective ECM and select Show Columns. Scroll through Selected Fields, highlight **‘Connect Creator’** and click the ‘Add’ button.



Name +	Id	Connect Creator
My First Connect Share	fA522102	
Completed Work	fA522125	
Building Plan alias	zA310317	
Contact List	A1472582	localgov.scott.marshall@mail.com
Cost Summary Report alias	zA310318	
Development Letter alias	zA310319	



**Objective ECM** GLOBAL Search

CONTRACTOR SPACE - DRILL DOWN CONSTRUCTION

**Updated Site Plan** (DOCX) [EDIT NEW VERSION](#)

[DOWNLOAD \(189.5 KB\)](#) VERSION: 0.1 OBJECT ID: A1606243

DRAFT 7 Mar 2018, 1:47 PM connectagent First version

MODIFIED 7 Mar 2018, 1:47 PM connectagent

VERSIONS BY connectagent

**CATALOGUE**

document

Connect Creator

contractor.bob.clayton@mail.com

[VERSIONS](#) [AUDIT EVENTS](#)

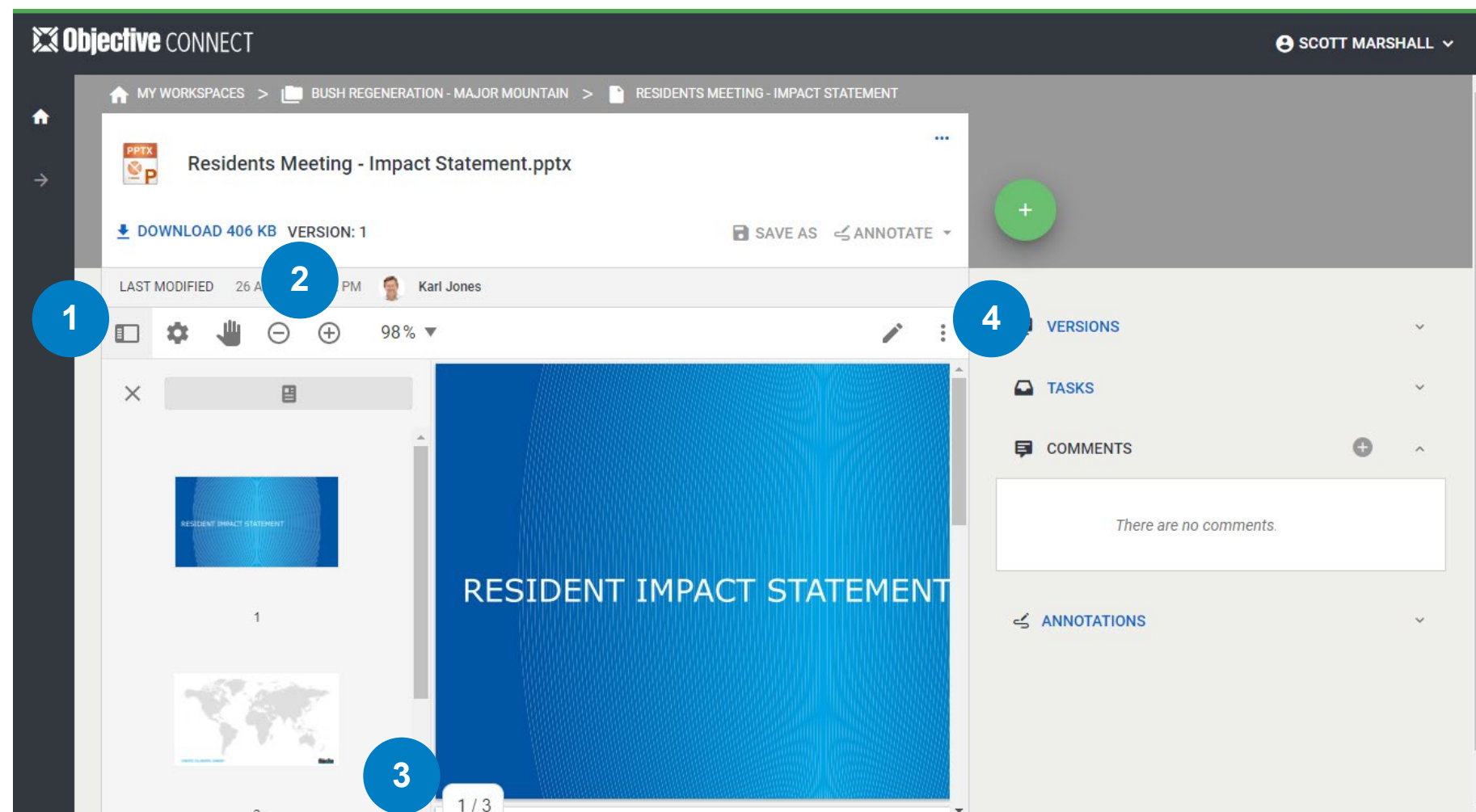
# Previewing Documents

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.
- Images files including .jpg, .png and .bmp.
- Audio files including .mp3 and .m4a.
- Video files including mov and .wmv.

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.
3. Skip to specific page numbers.
4. View **full screen** mode.




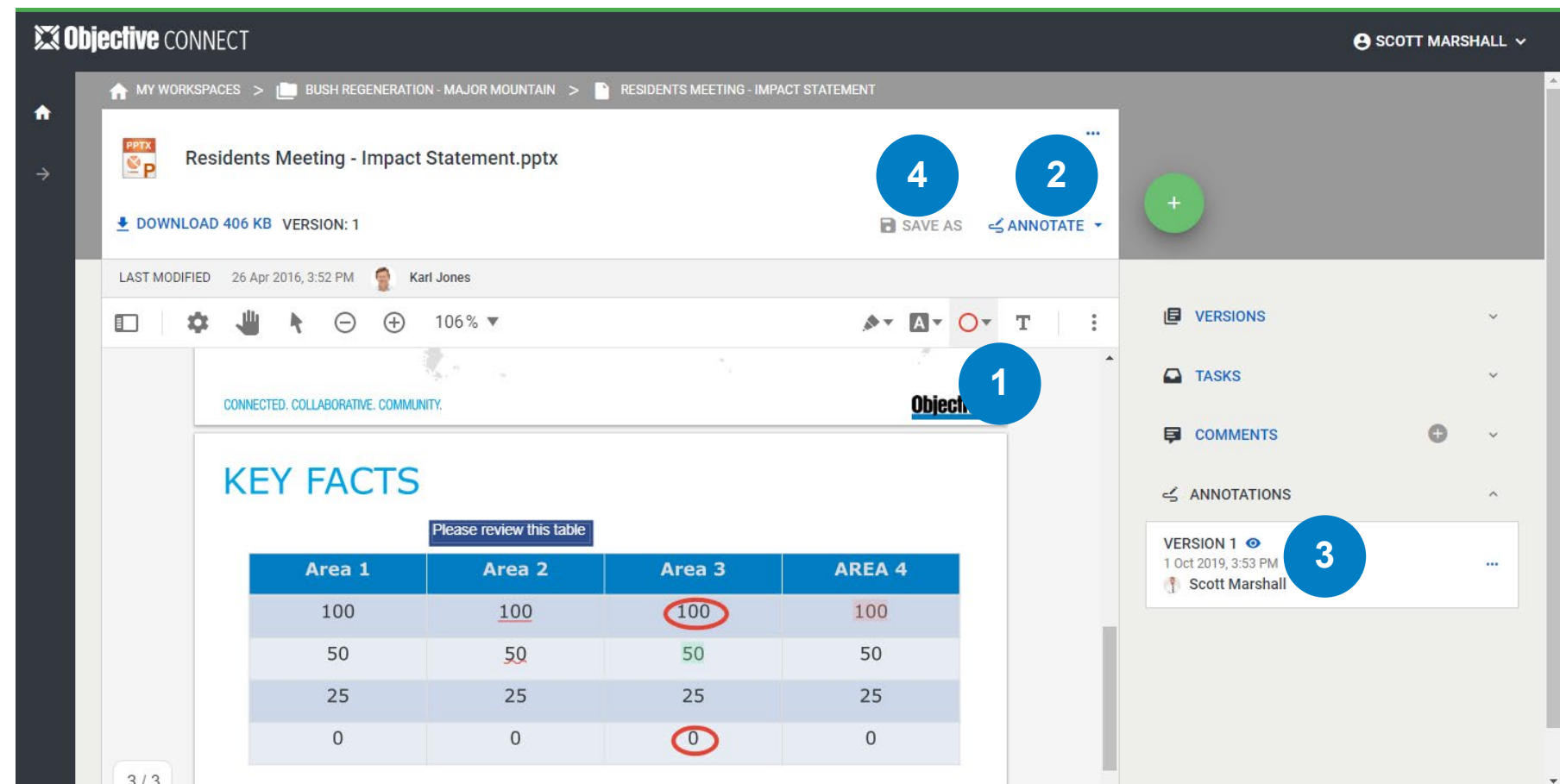


# Annotating Documents

Add annotations to Microsoft Office, Adobe PDF documents and images. For example, if you want to prepare for a board or committee meeting, you can add your annotations as 'margin notes' for your reference.

To annotate a document, go to its preview:

1. Use the different annotation tools to add annotations in the document.
2. Set annotations to be **Private** or **Public**. Only you can view your private annotations, but all participants will be able to view public annotations.
3. View annotations on the document by selecting  You can view your private and public annotations in addition to other participants' public annotations.
4. A workspace owner can **save** visible annotations as a new PDF document to the workspace.

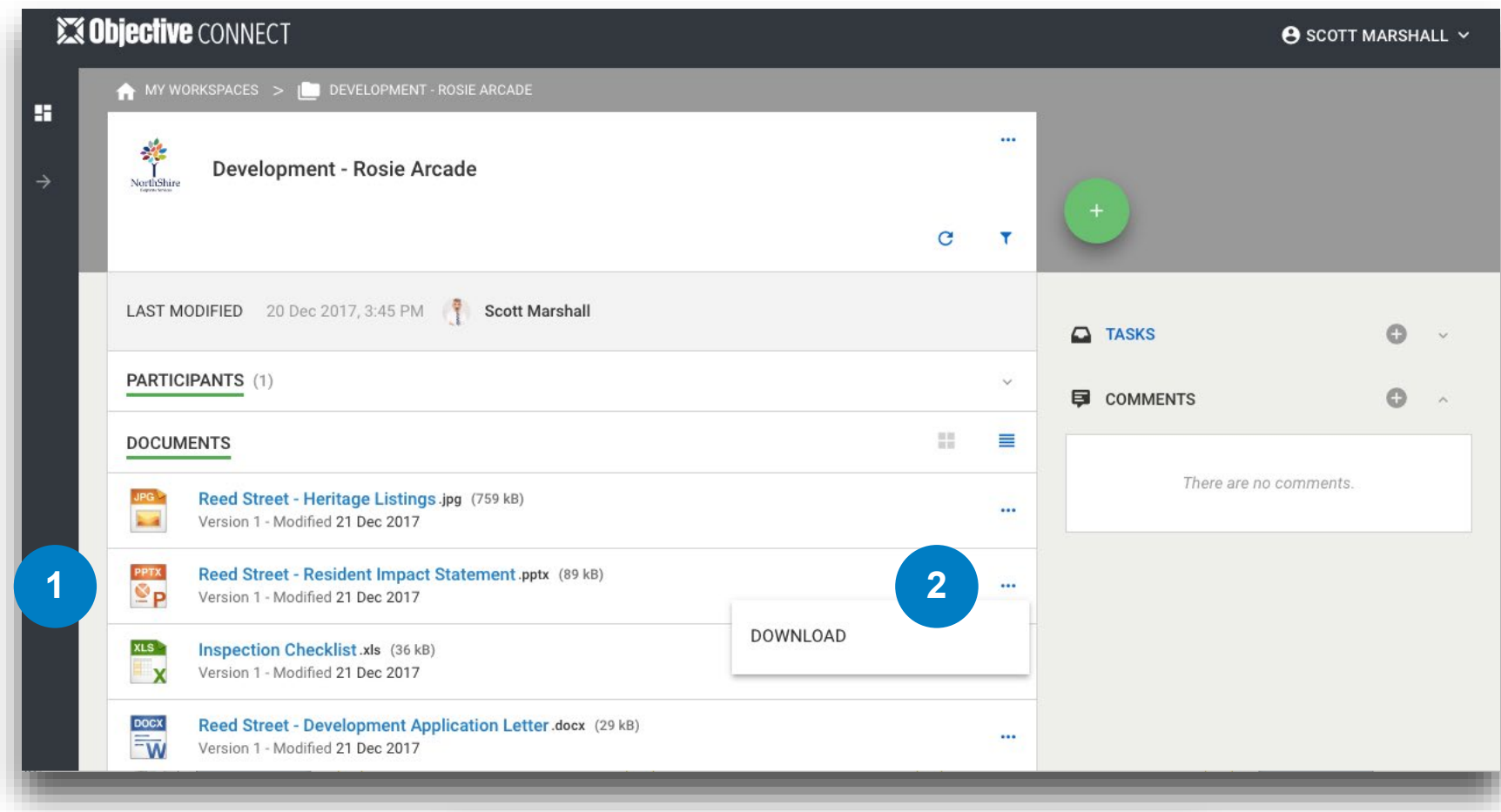


# Downloading Documents

To download a document, click on the Workspace name containing the document you wish to download:

- 1. Locate the document.
- 2. Click the ... menu and select **Download**.

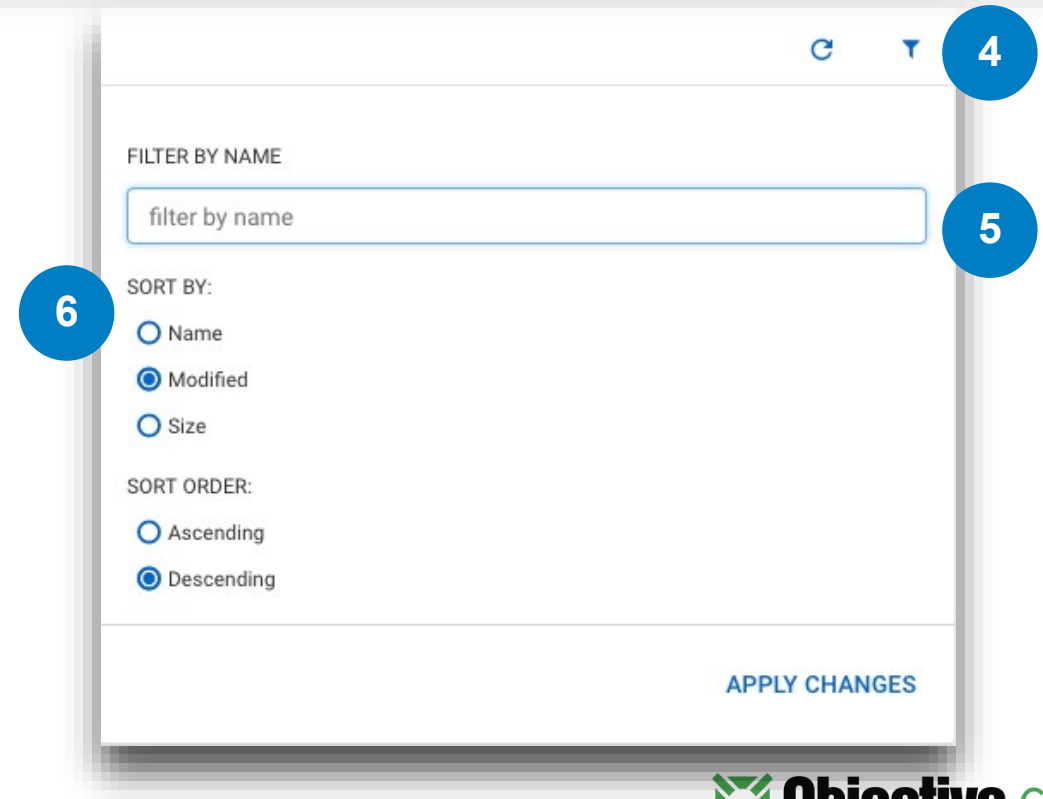
The document will be available in the downloads section of your computer downloads.



# Searching Documents

To search for a document, use the Filter option:

- 3. Click on the Filter icon.
- 4. To **filter by name**, insert the name in the Filter by Name box.
- 5. Select the criteria to **sort documents** by: Name, Modified Date and Size.
- 6. Click on **Apply Changes**.



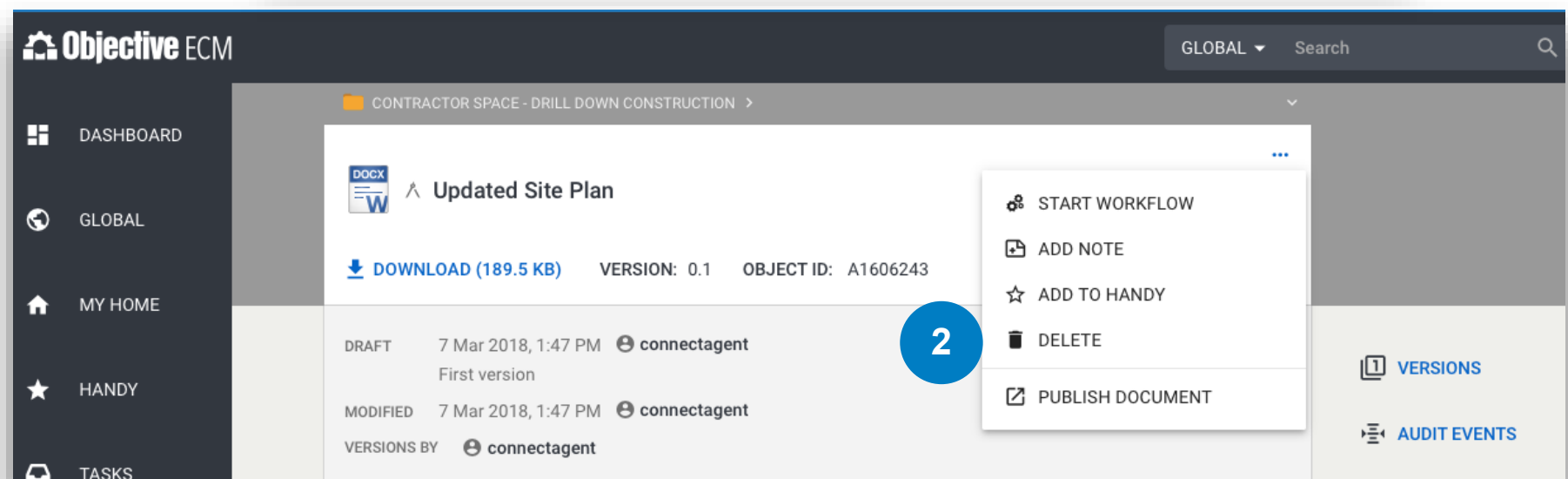
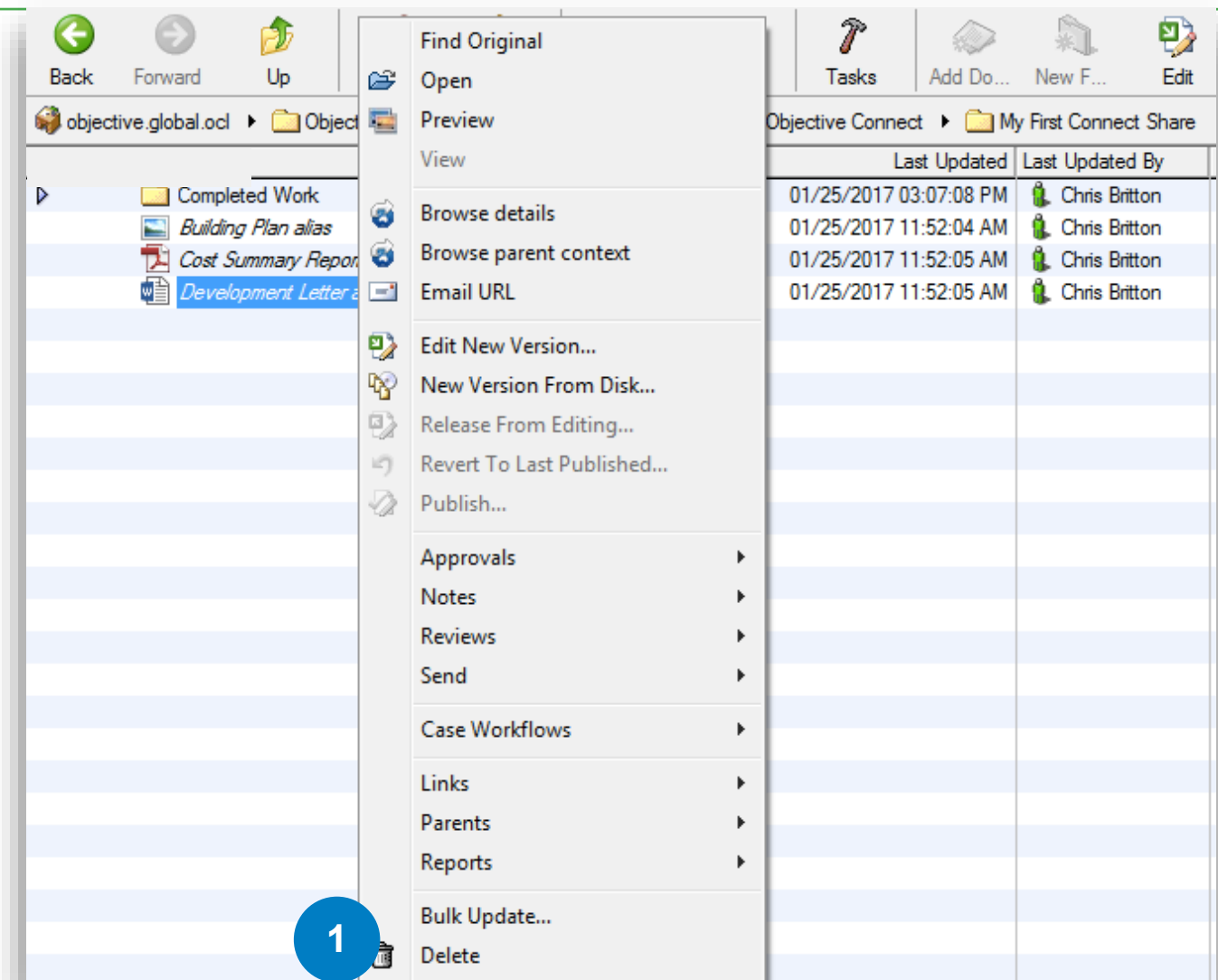


# Deleting Documents via ECM

As documents are being governed by Objective ECM, they cannot be deleted or moved into subfolders via Objective Connect. These functions need to be completed in ECM.

To delete a document:

1. From with **ECM Navigator**, Right click on the document in ECM and select **Delete**.
2. From with **ECM Browser**, Right click on the document in ECM and select **Delete**.



## 7. CAPTURE CONVERSATIONS

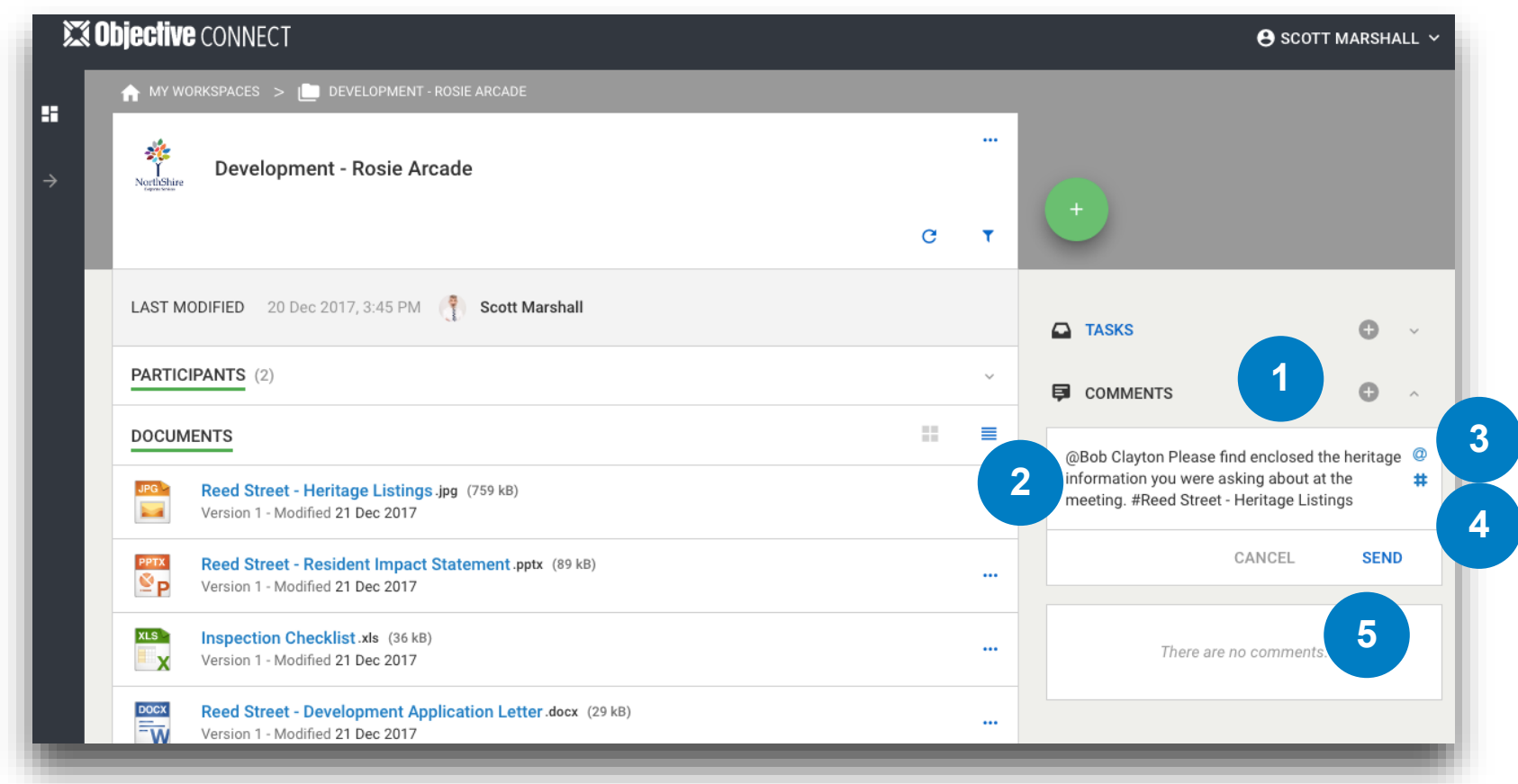
# Commenting, Mentioning and Referencing

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.
4. To reference a file in a comment, **use the # sign**.
5. Click **Send** to post the comment.

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.



## 8. CONTROL TASKS

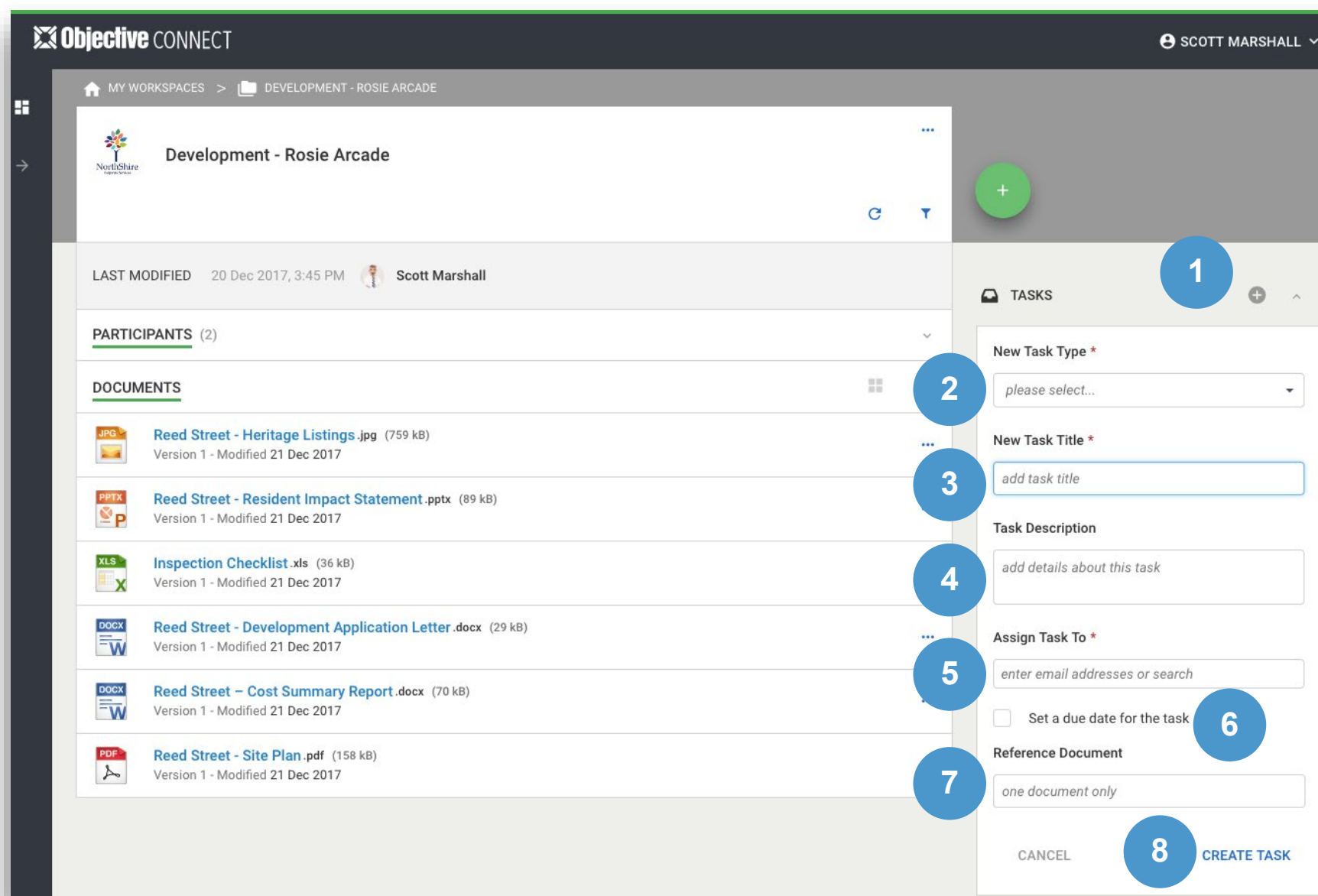
# Creating Tasks

Tasks deliver complete transparency to everyone involved, including exactly who was asked to do what and when.

Workspace creators can create Tasks to acknowledge, review and approve decisions, keeping everyone informed. Only the Workspace creator can create Tasks, however they can be allocated one or more participants at a time. To create a Task:

1. Click on **+ Tasks icon**.
2. Select the type of Task you wish to create.
3. Give your Task a title.
4. Describe the particulars of the Task.
5. Assign the Task to one or more participants.
6. **Set a due date** for the Task if necessary.
7. Type the name of the **reference document** that is connected to the Task.
8. Click on Create Task.

Once the Create Task button is selected, an email will be sent to the assigned Participants notifying them of the Task. A follow up reminder email will also be sent if a Task is not completed within the specified timeframe.





# Viewing Tasks

It is easy upon login to see all Tasks that have been created by you or assigned to you by clicking on the Tasks button.

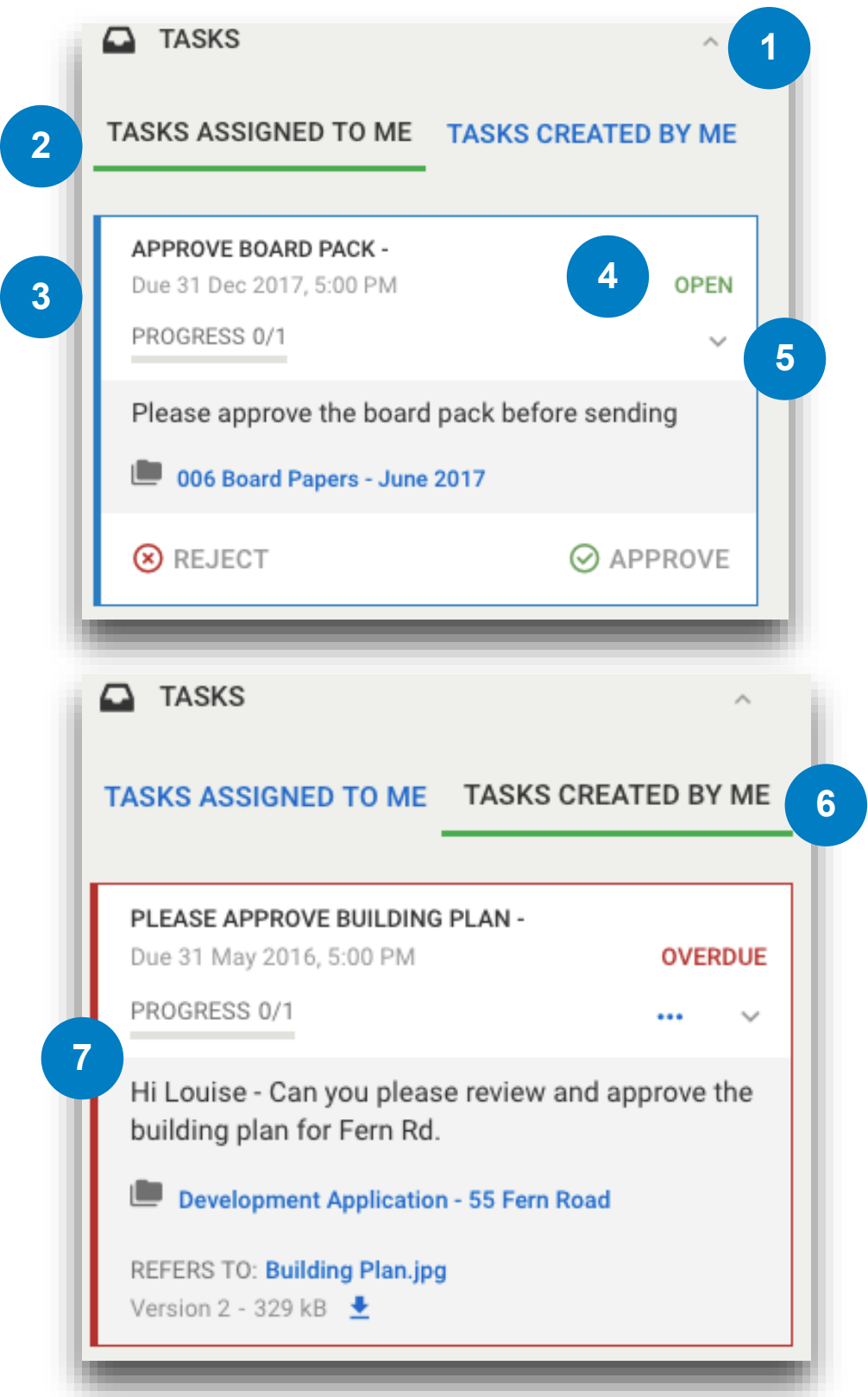
So you know what's important, overdue Tasks are always listed first, with the remainder listed in due date order. Similarly when accessing a Workspace, the Tasks are listed.

To view **Tasks assigned to you**:

1. Click on the  **Participant icon**.
2. Click on Tasks Assigned to Me.
3. If the Task has a due date/time, this will be visible.
4. Review Task instructions. Click  to see further details relating to the Task.
5. The Task status is displayed as Open if it still needs to be actioned or Completed.

To view all **Tasks created by you**:

6. Click on Tasks Created by Me.
7. View details of Tasks, who they were assigned to and their status.



# 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.

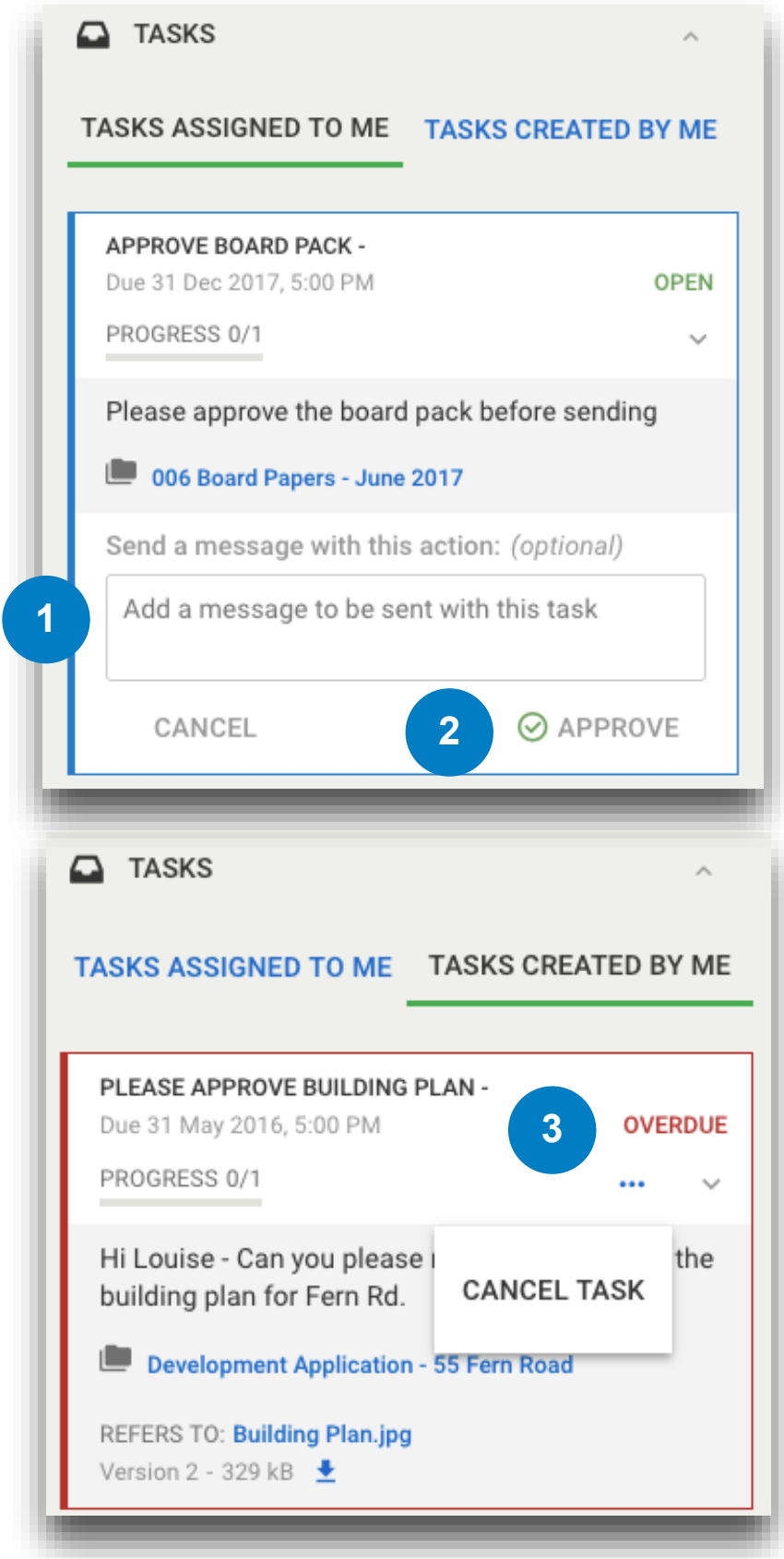
The Open icon will change to a Completed icon when the Task has been actioned.

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.



# Following Task Progress

If you have created a Task, you will want to manage the progress of Tasks. With Objective Connect, it is easy to see the status of Tasks relating to a Workspace and any comments made by Participants.

- 1. When multiple Participants have been allocated to a Task, a **progress bar** is displayed. The progress bar is broken up by the number of Participants assigned to a Task. As each Participant completes the Task, it is recorded in the progress bar.
- 2. The Task can also be expanded to **show exactly who has actioned the Task**.

1

REVIEW INSPECTION CHECKLIST -

Due 31 Dec 2017, 5:00 PM

PROGRESS 1/3

2

OPEN

...


^

Please review the Inspection Checklist


Development - Rosie Arcade

REFERS TO: [Inspection Checklist.xls](#)


Version 1 - 36 kB [↓](#)




Bob Clayton



Irene Moss



Anne Wicks





## 9. CLOSE A WORKSPACE

# Closing a Workspace

Once a project is complete, you can Close your Workspace via Connect.

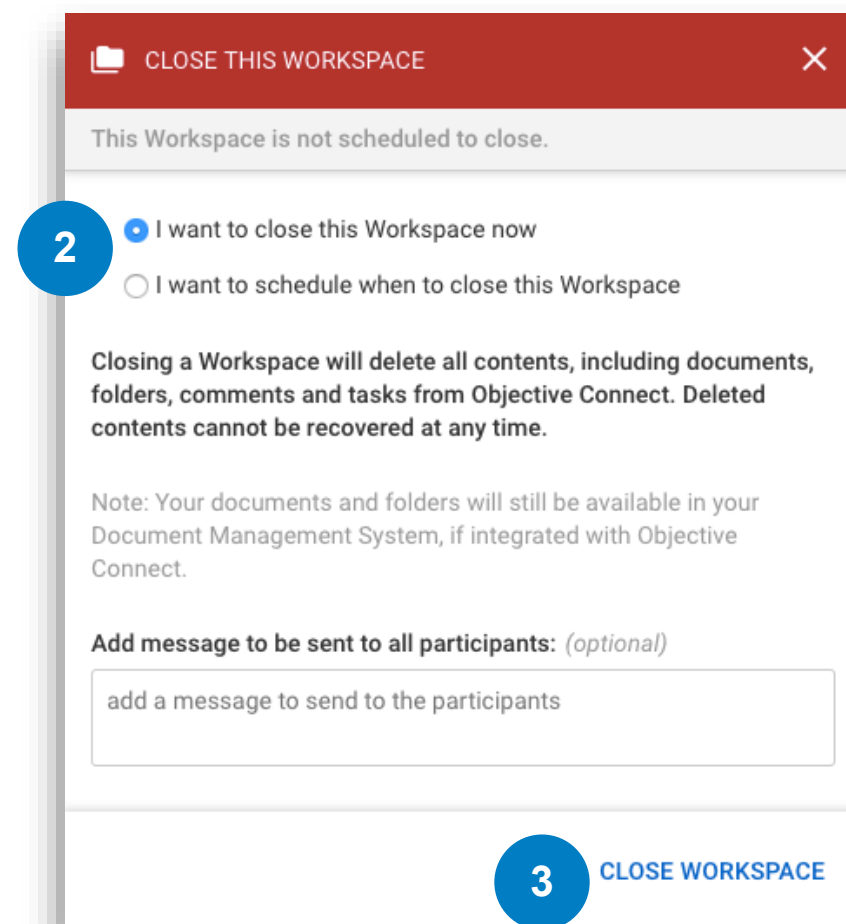
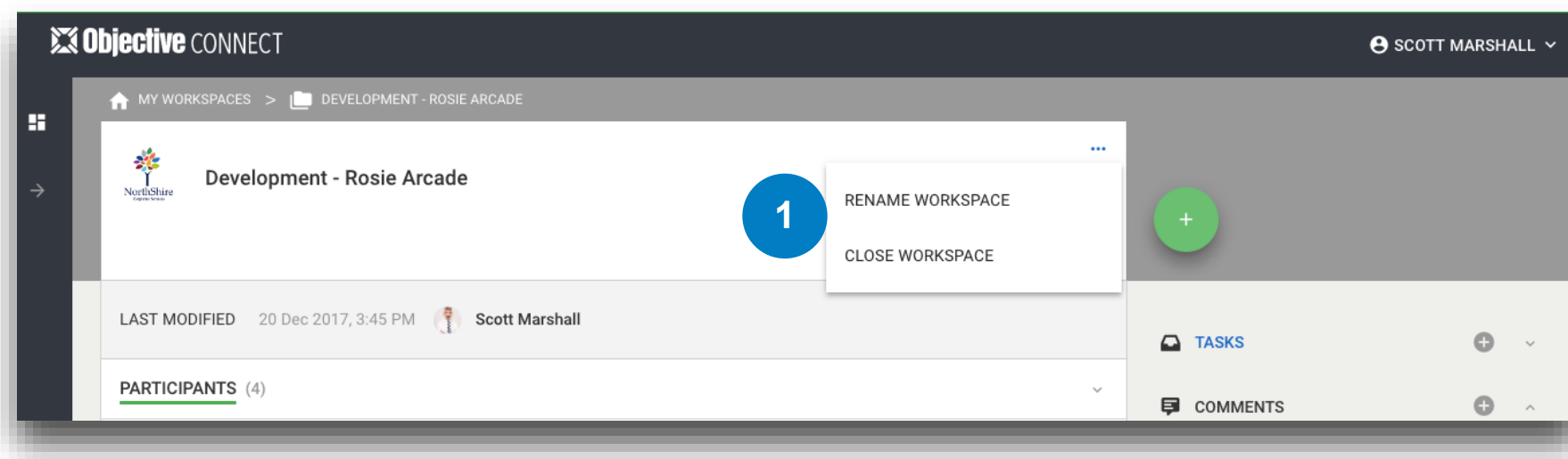
Access the Workspace you wish to end:

1. Click **...** menu and select **Close Workspace**.
2. Select whether to end a Workspace **immediately** or to **schedule a date in the future** to end the Workspace. It is important to note that when a Workspace is ended, the content, including all documents, comments and tasks will be deleted.
3. Click on **Close Workspace**.

**All Participants will be notified** via email that the Workspace has ended or will be ending at the scheduled time.

If you have scheduled an end date, this can be removed and or amended at anytime, prior to the end of the Workspace.

Alternatively, the Workspace can be ended by **deleting** the synchronised **folder in ECM**.





**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.

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**GREAT GOVERNANCE >>>  
BETTER BUSINESS**

## 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 work-spaces.

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

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**Objective**