Objective CONNECT

GETTING STARTED FOR WORKSPACE OWNERS

YOUR GUIDE TO OBJECTIVE CONNECT

GREAT GOVERNANCE >>>
BETTER BUSINESS

Objective

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**.

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
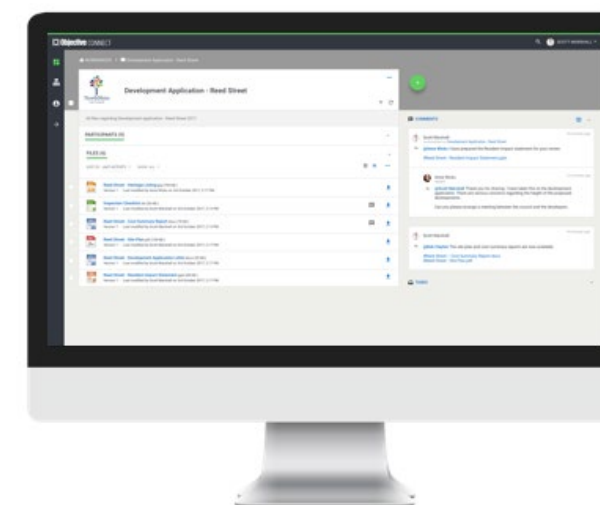
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2. Create a Workspace

3. Collaborate on Documents

4. Capture Conversations

5. Control Tasks

5. Close a Workspace

1. NAVIGATION

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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.
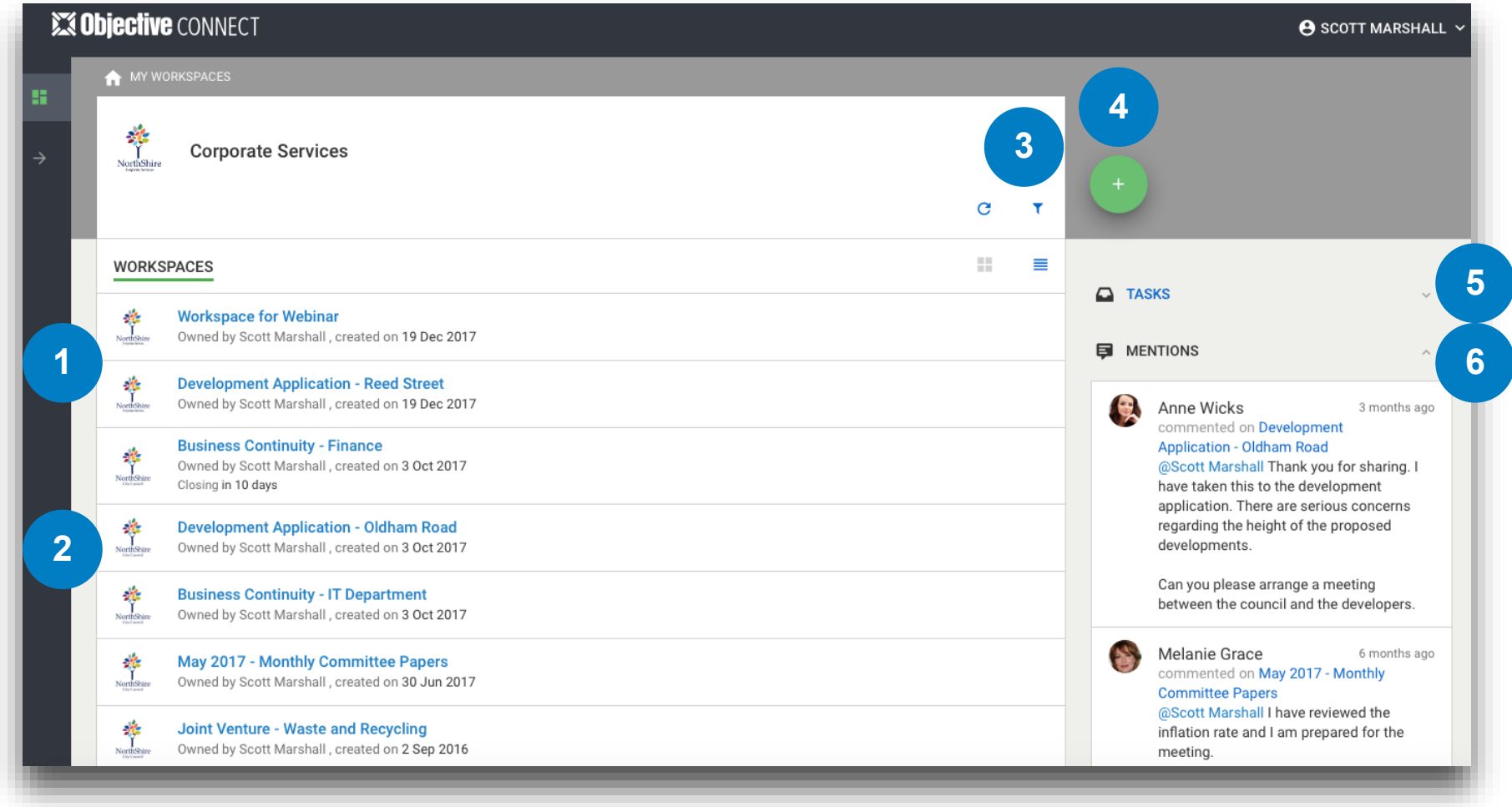
Navigation

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.
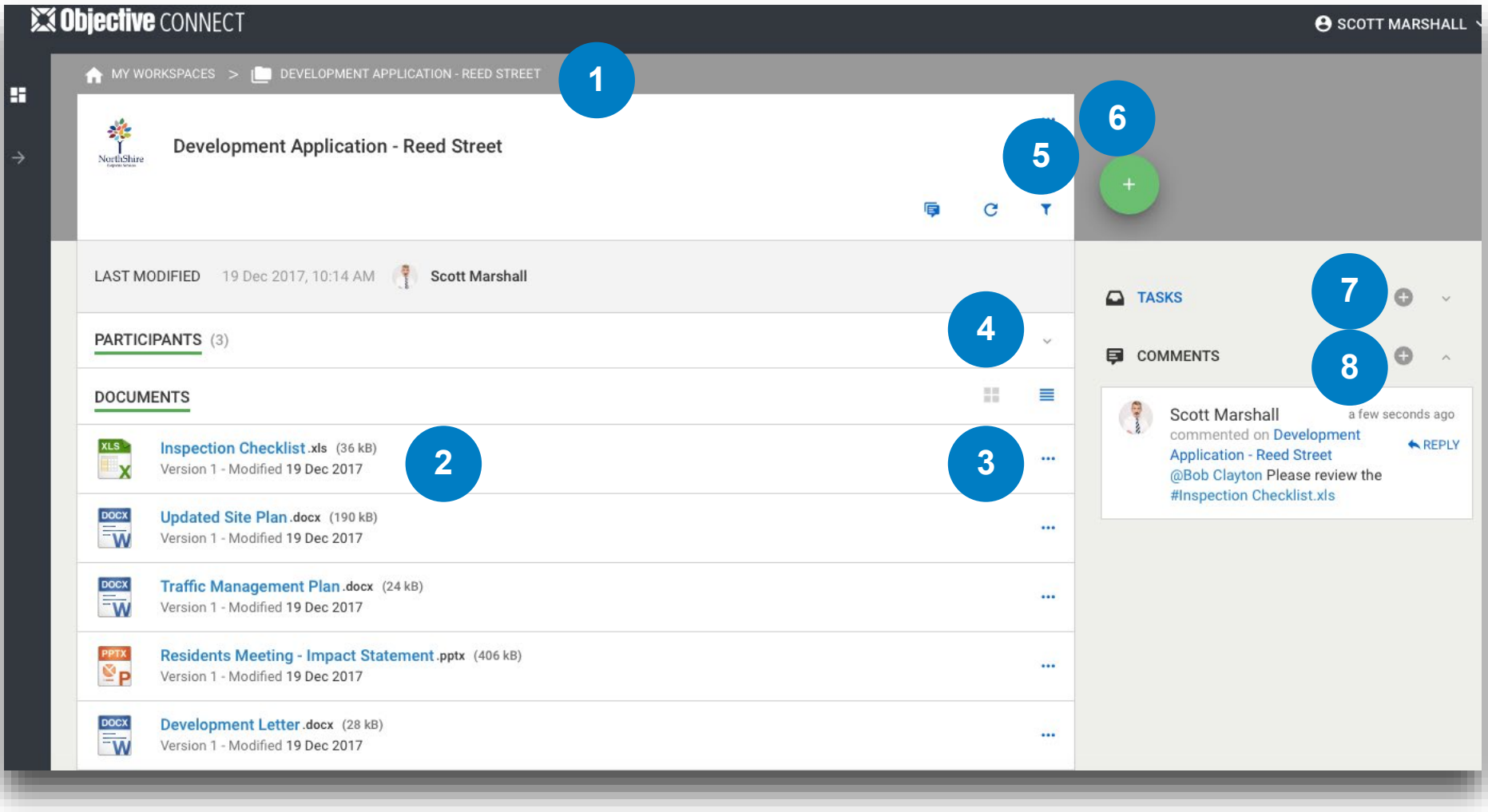
Switch to Thumbnail View

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.
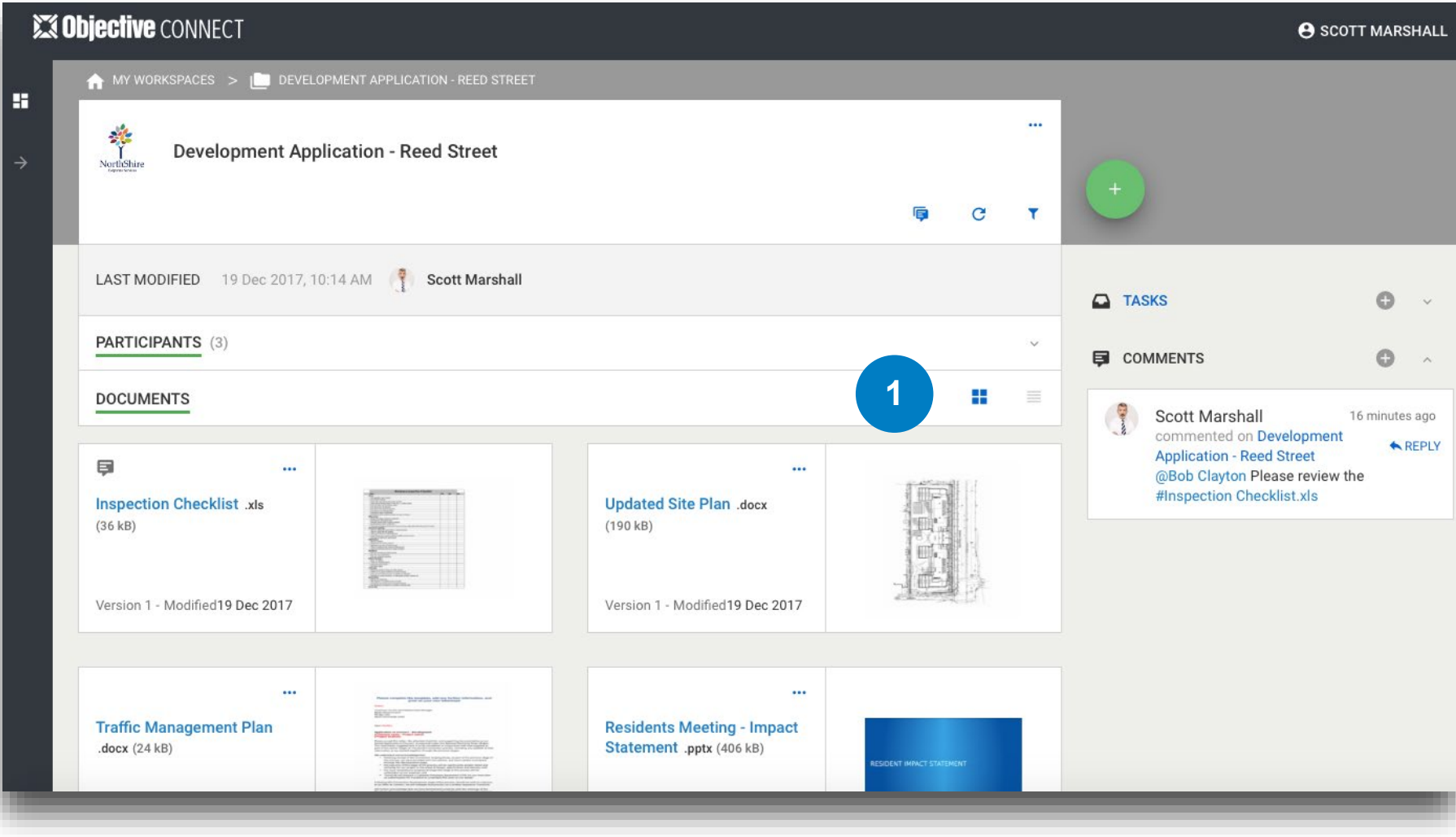
Update your Settings

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**.
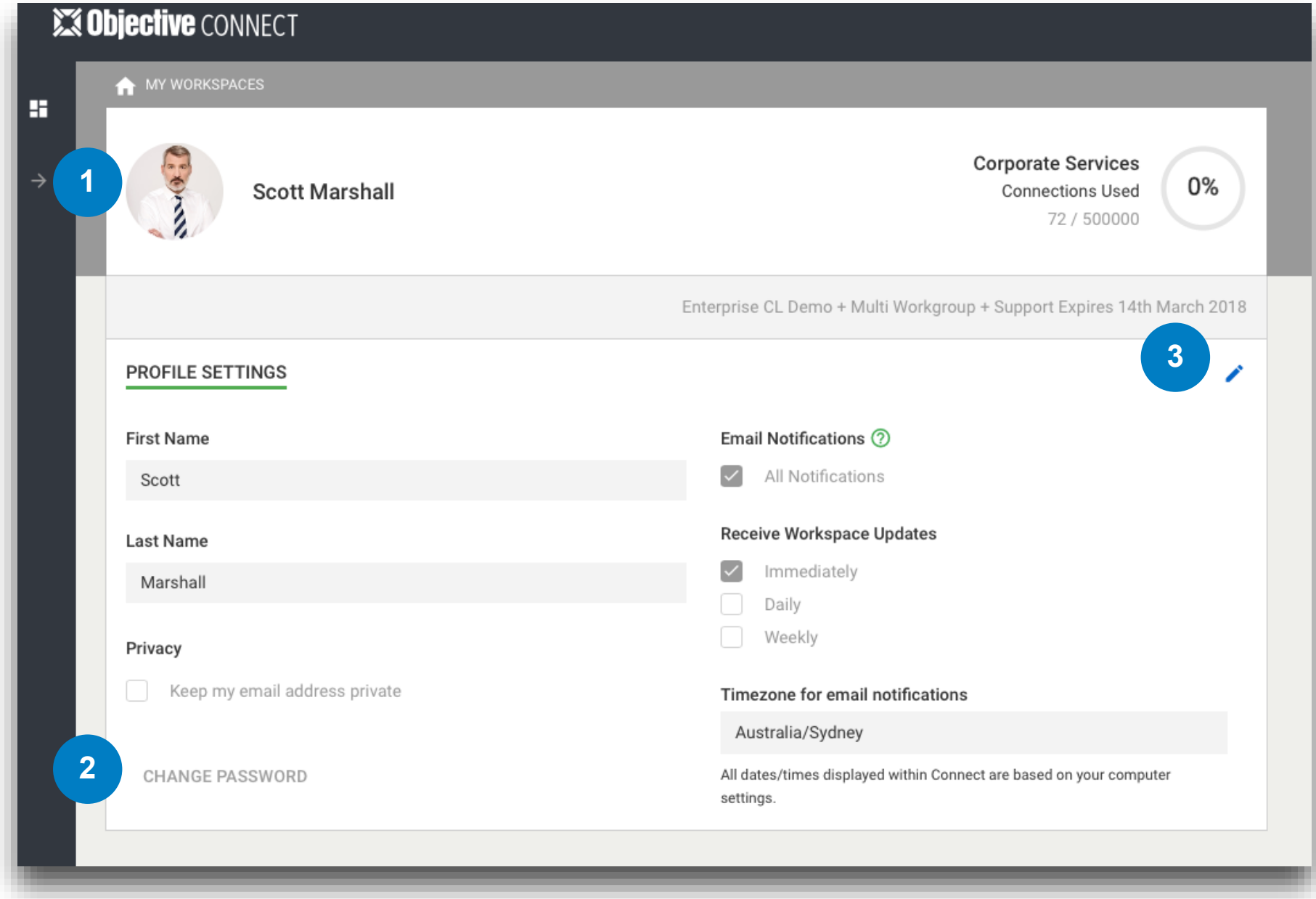
2. CREATE A WORKSPACE
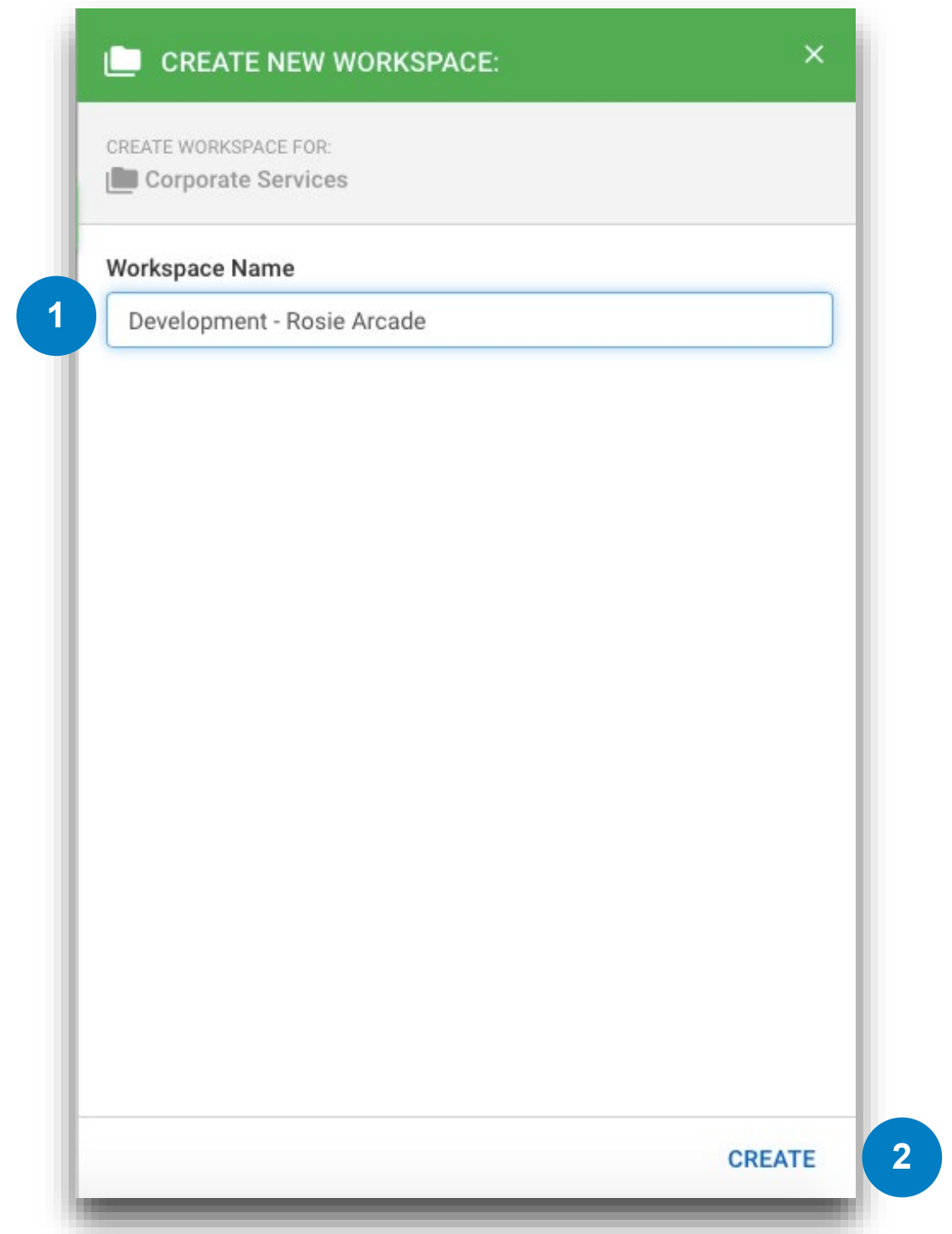
Create a Workspace

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**.

Your Workspace will now be listed under My Workspaces. Click the Workspace name to open it.

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

CREATE NEW WORKSPACE:

CREATE WORKSPACE FOR:
Corporate Services

Workspace Name

Development - Rosie Arcade

CREATE
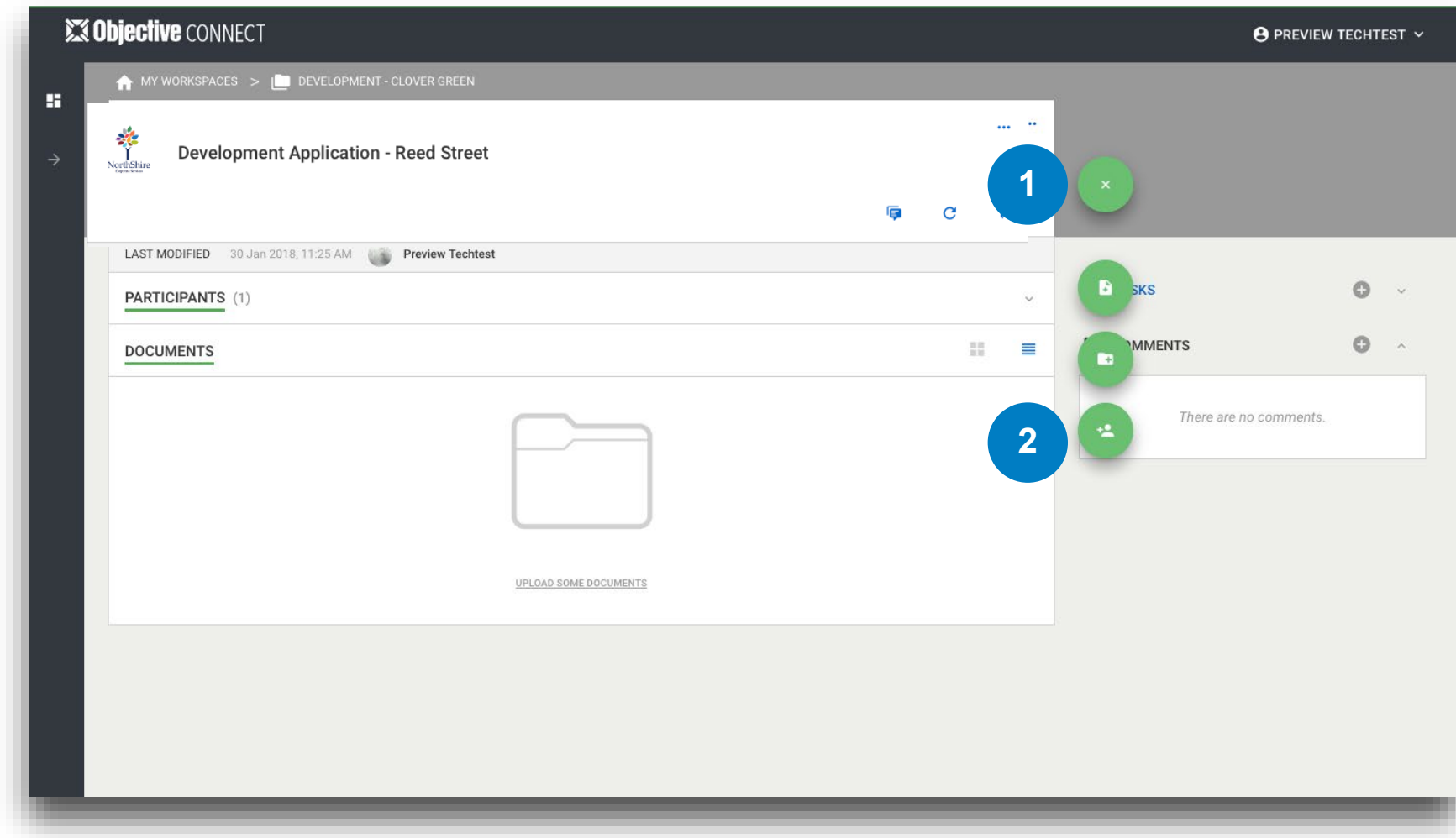
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How to invite a Participant

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

Select the Workspace you wish to add Participants:

1. Click the green **+** icon

2. Then click the **Add Participant** icon

The Invite Participants Blade will appear.

How to invite a Participant continued

From within the Add Participants blade you can select the Workspace you wish to add Participants to by clicking on it. Next:

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:

1 joe.doe@mail.com ✖   jane.dow@mail.com ✖

Participants will be able to:

add documents

create folders

2 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)*

**3** add a personal message to send to the participants

4 SEND INVITATIONS

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3. COLLABORATE ON DOCUMENTS

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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.
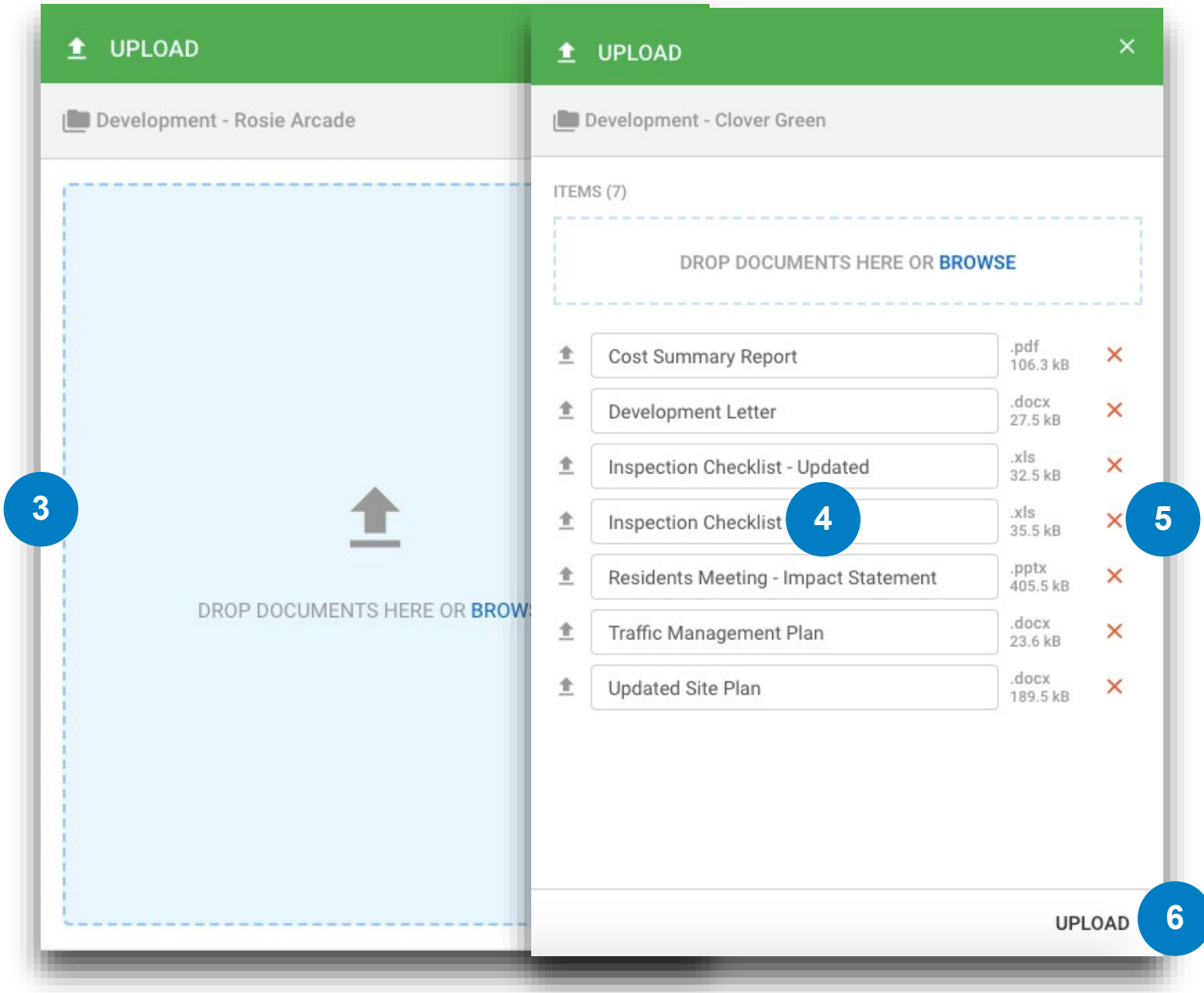
Adding Folders via Connect

To add folders to a workspace:

1. Click the green **+ icon**.
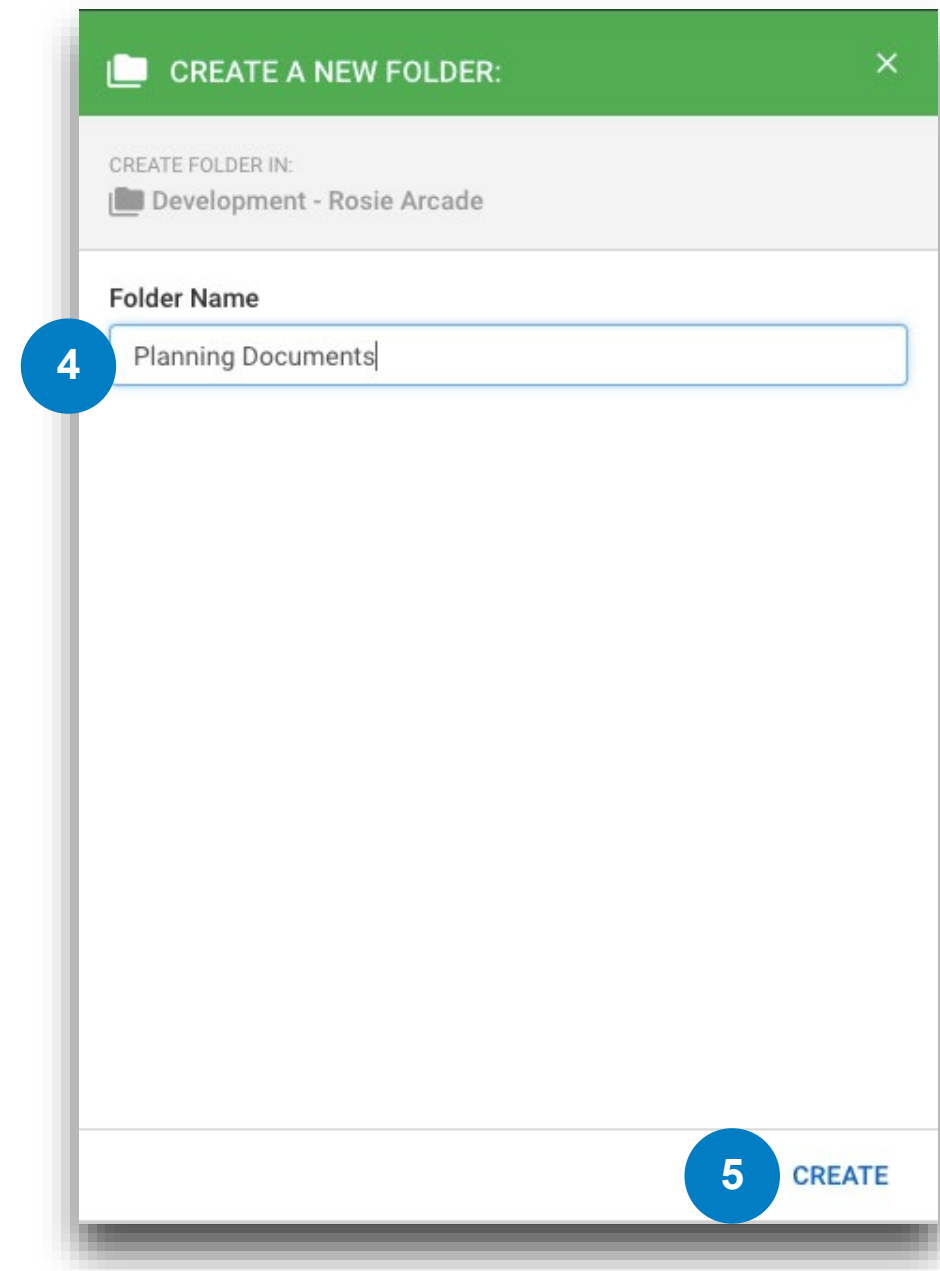
2. Select the Create icon.

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.

CREATE A NEW FOLDER:

CREATE FOLDER IN:
Development - Rosie Arcade

Folder Name

4 | Planning Documents

5 CREATE

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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 .dcc, .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.

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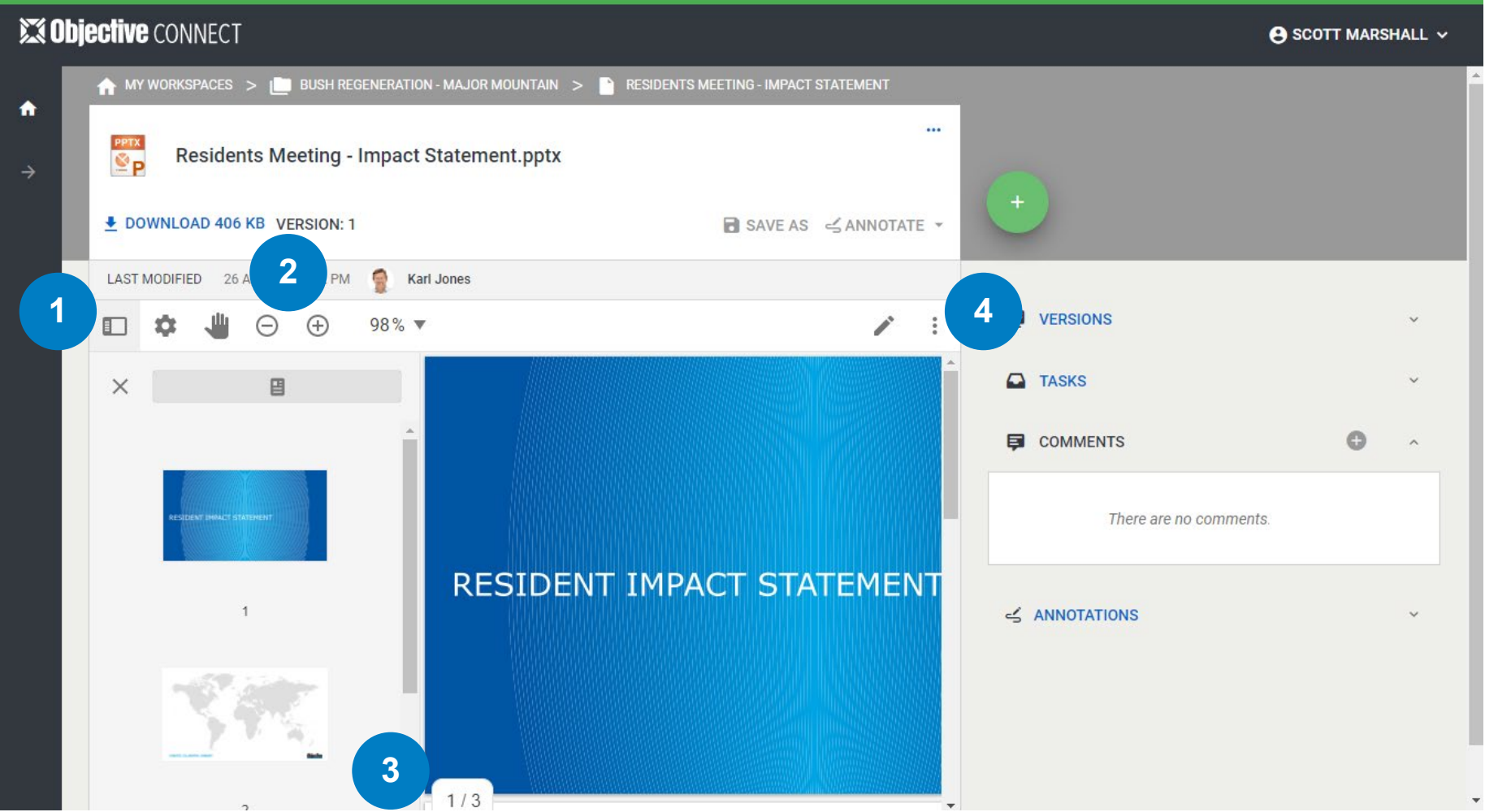
Annotating Documents

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.

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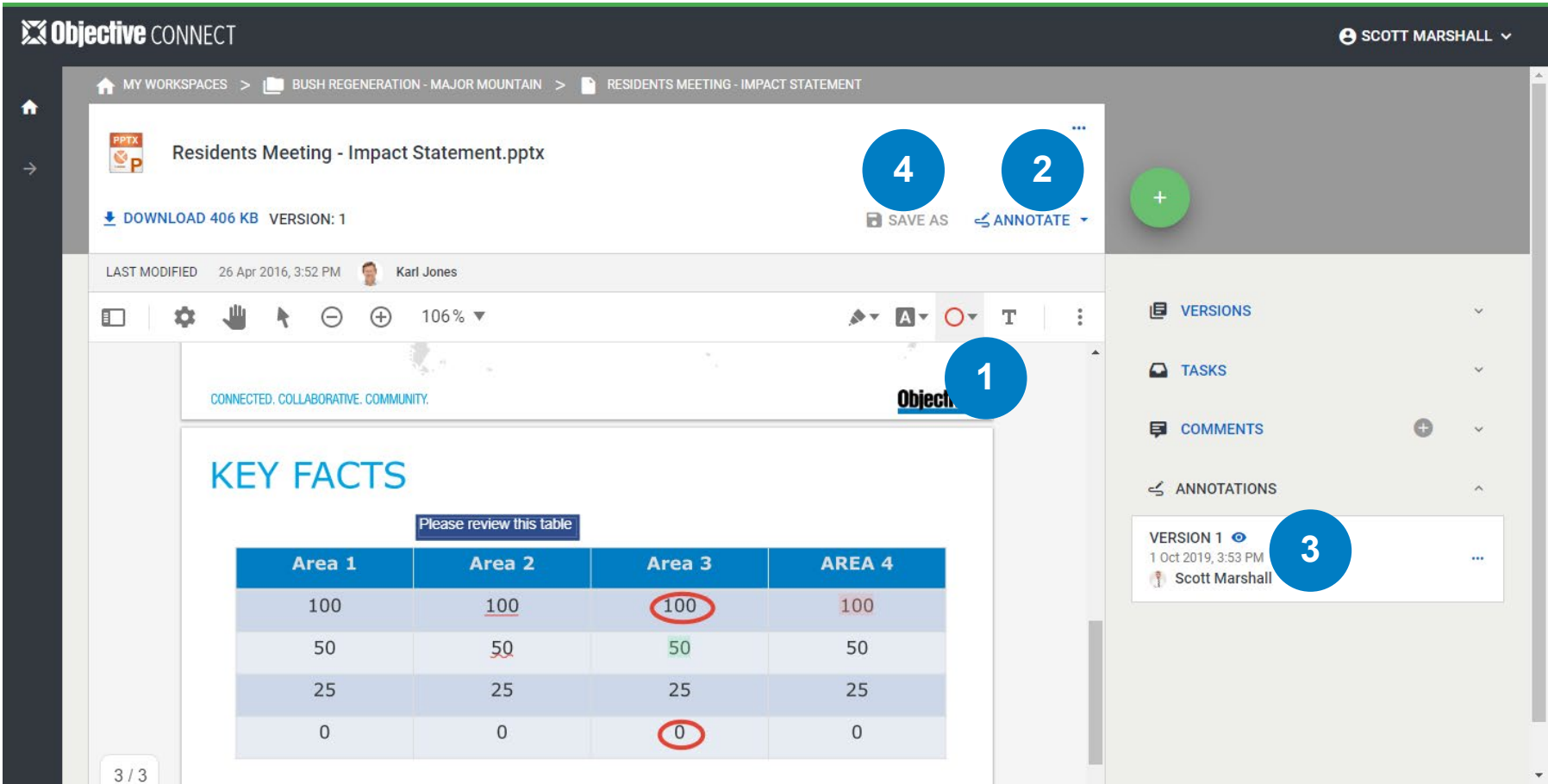
Managing Document Versions

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.
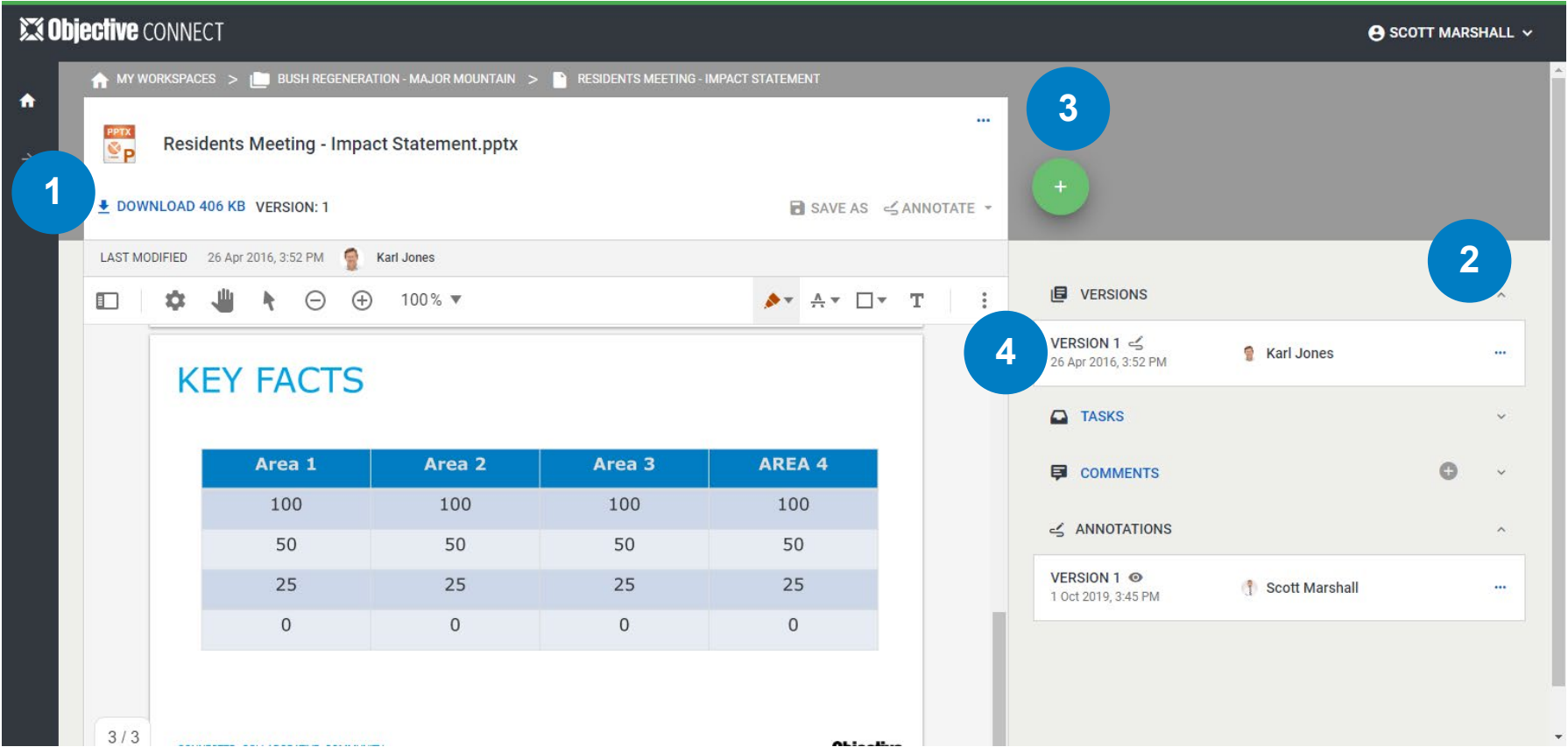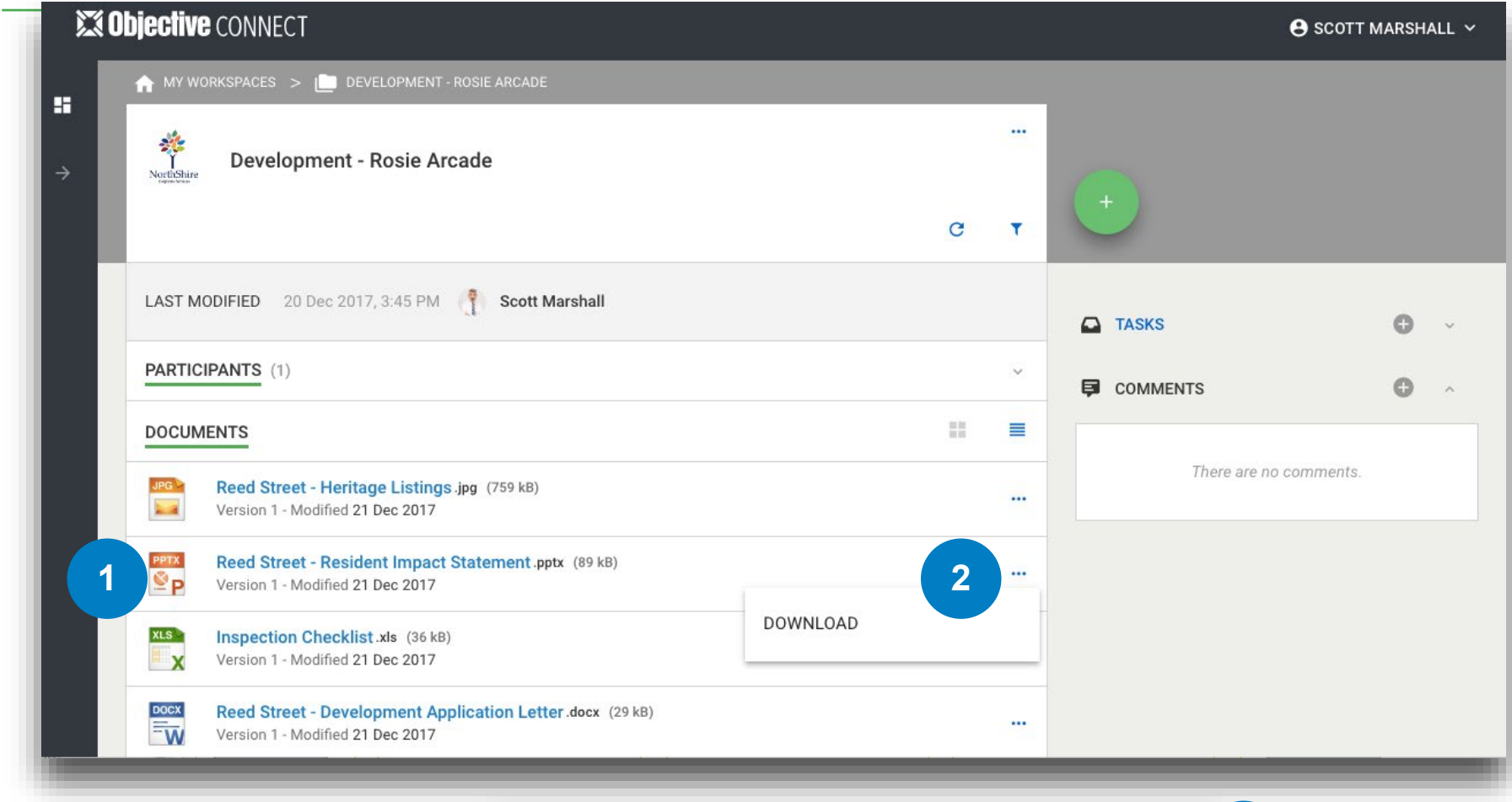
Downloading Documents

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

1. Locate the document.

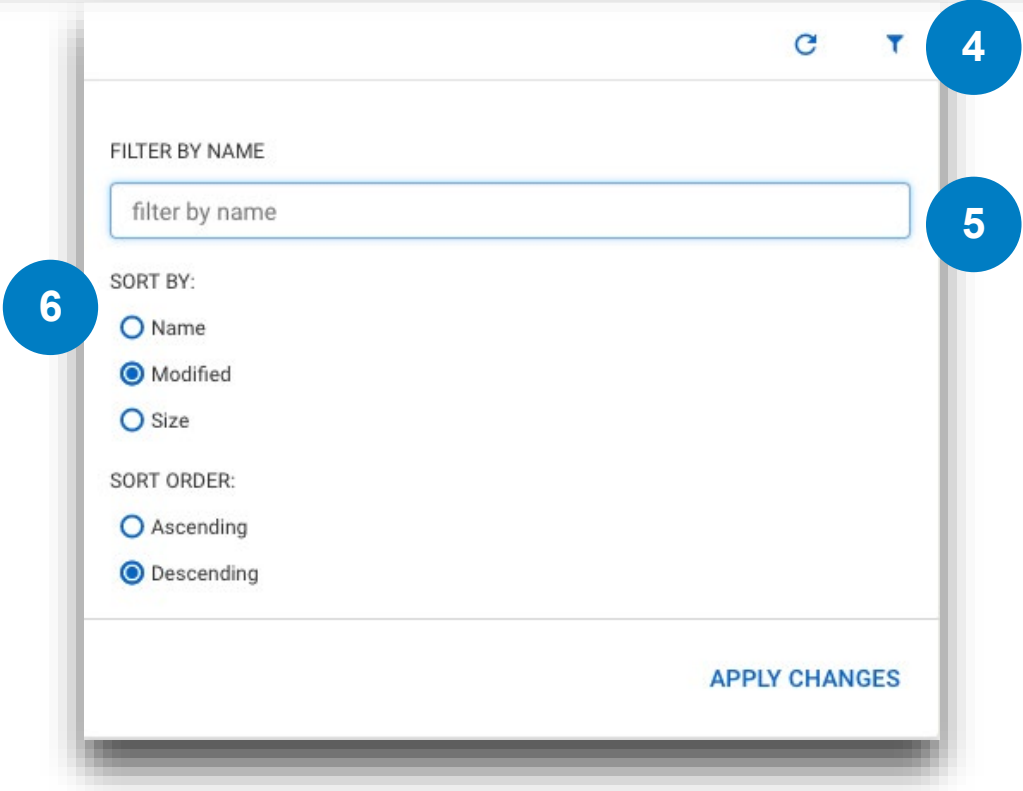2. Click the **… menu** and select **Download**.

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

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.
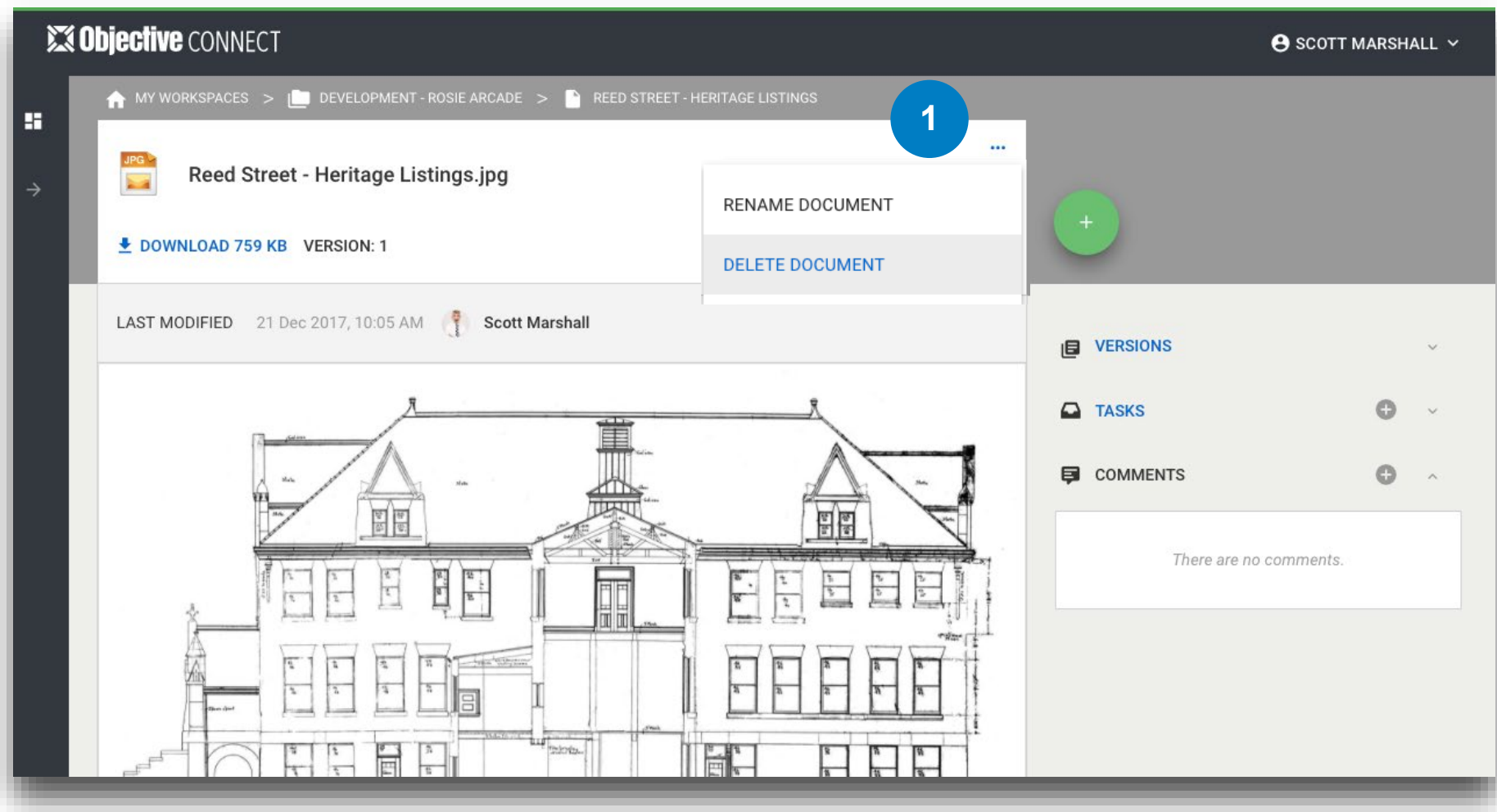
# 4. CAPTURE CONVERSATIONS

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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.

# 5.   CONTROL TASKS

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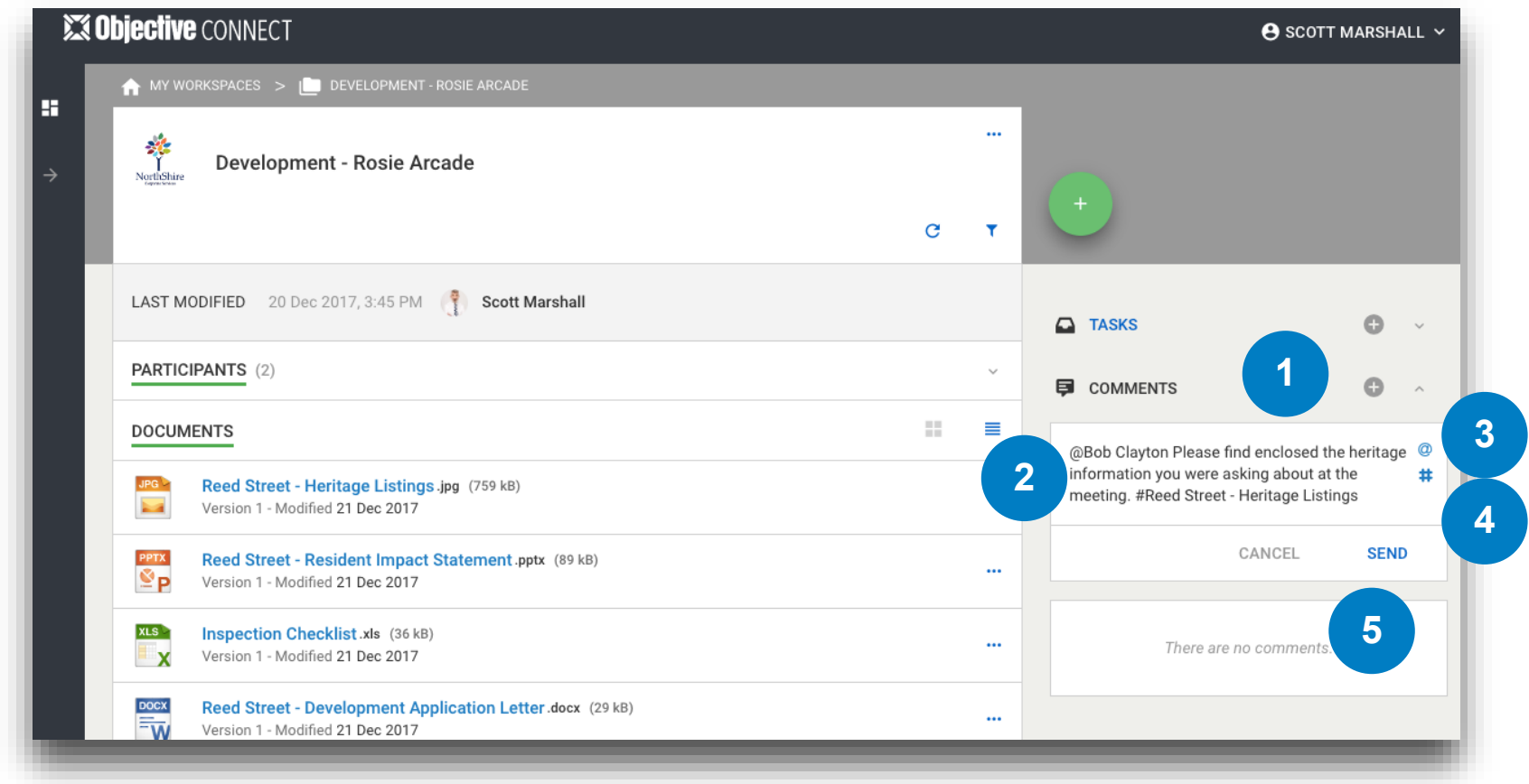
Creating Tasks

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.
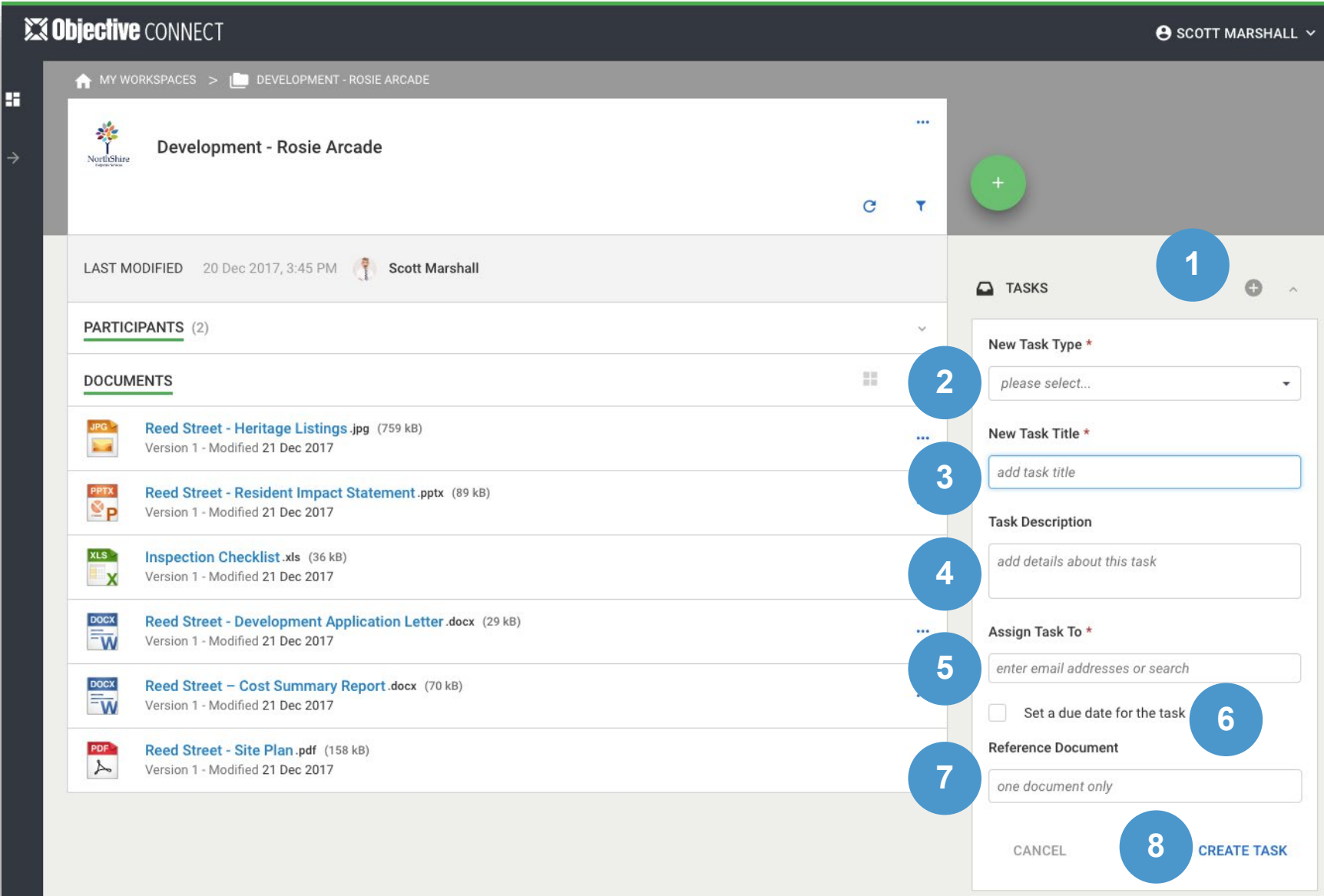
Viewing Tasks

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.
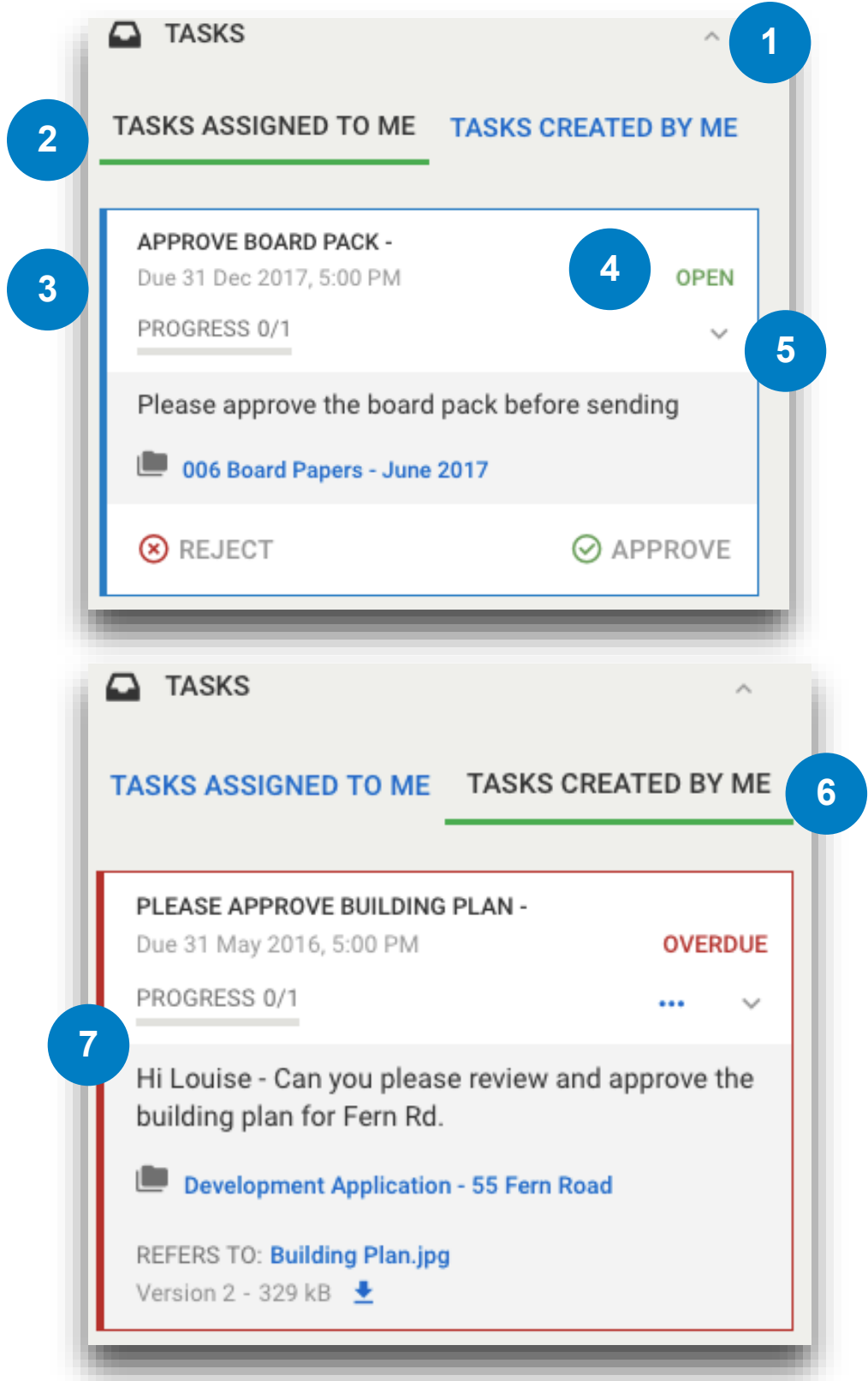
Managing Tasks

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.
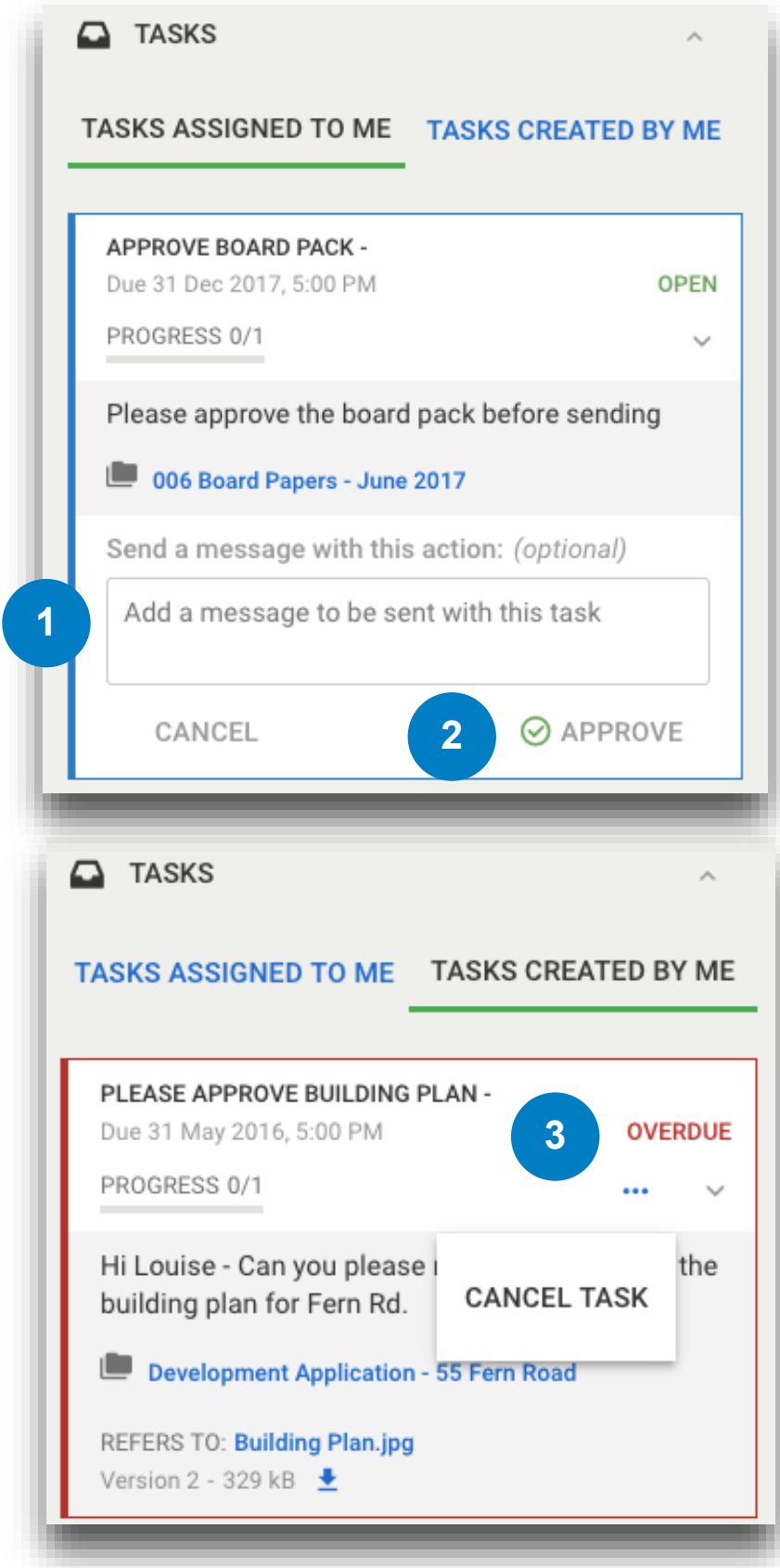
Following Task Progress

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**.
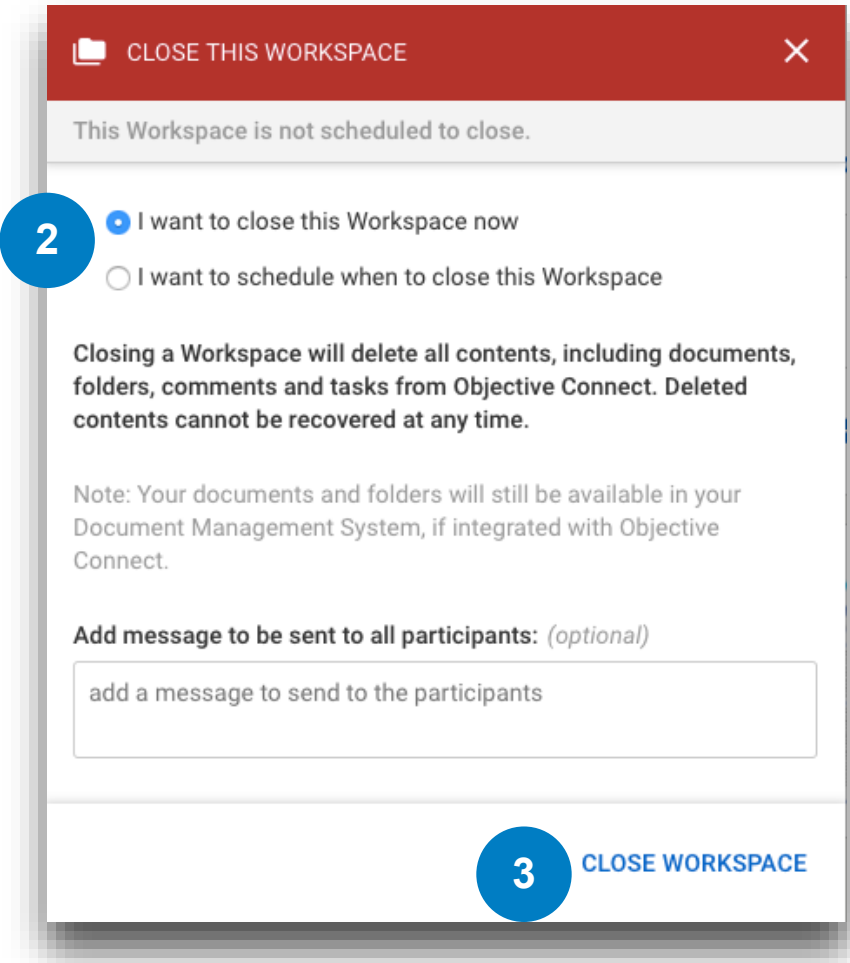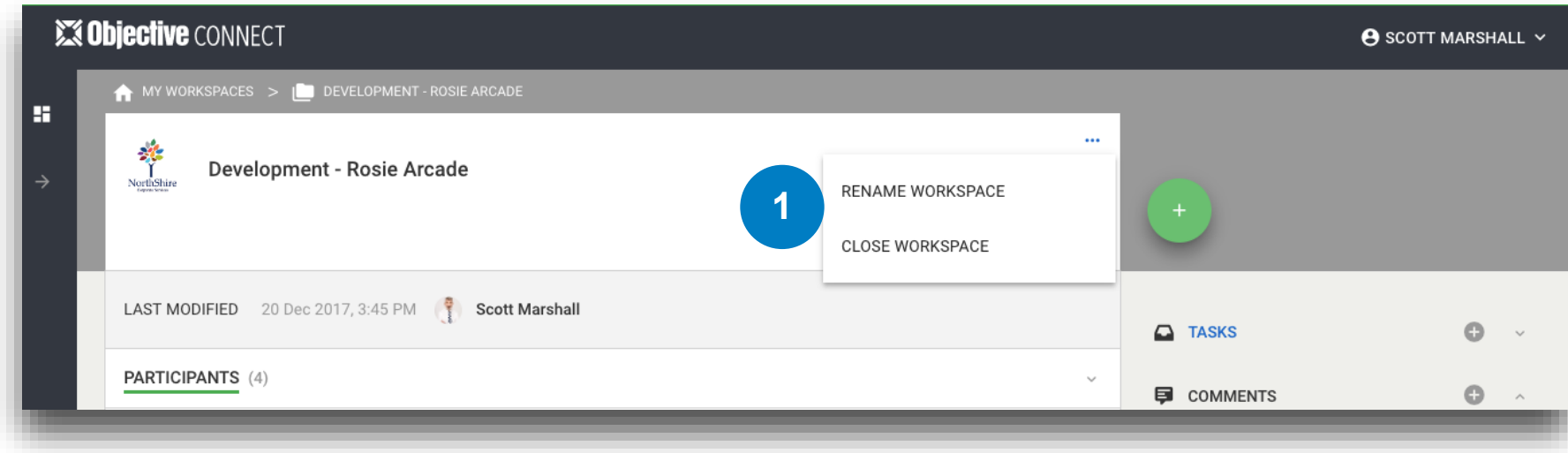
6.   CLOSE A WORKSPACE

Closing a Workspace

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

Go into 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 or amended at anytime, prior to the end of the Workspace.

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www.objectiveconnect.com

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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