



GETTING STARTED WITH OBJECTIVE CONNECT

YOUR GUIDE TO iOS AND ANDROID





A secure, private Workspace, enabling you to work with anyone outside of your organisation.

About Objective Connect

Objective Connect creates a secure, private Workspace so you can work with anyone, even when they are outside your firewall. Objective Connect is the secure and efficient way to work with partners on projects, manage your outsourced service providers or collaborate with any external party.

With Objective Connect you can manage almost any business process. Remove the need for paper, email, thumb drives, DVD's or shadow IT and increase visibility by ensuring all of the latest information is stored in a single, secure Workspace.

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.

About This Guide

The following Guide is designed to enable you to get started with Objective Connect for Mobile. This app is available on both the Apple and Google (Android) Platforms.

The guide covers key concepts such as accessing your Objective Connect workspaces from your mobile device, plus managing and or participating in workspaces.

Note: Whilst the majority of this document demonstrates the functionality using a phone, the functionality performs identically on a tablet.

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



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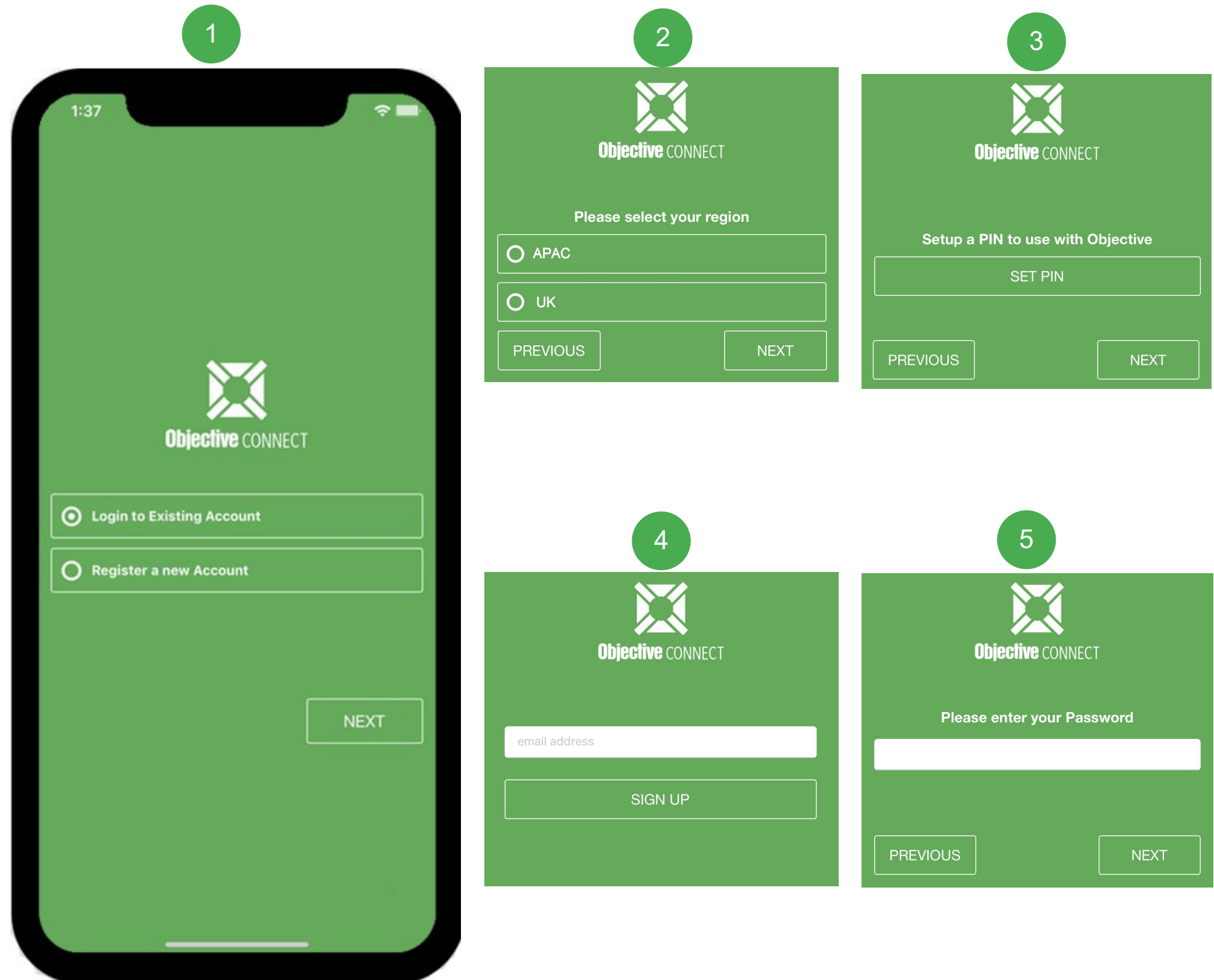
1. LOGGING IN

Logging In For the First Time

Once you have downloaded and installed Objective Connect on your device you will need to authenticate your credentials.

1. Select Login to Existing Account.
2. Select your Region
3. Set up your **PIN**. Enter and confirm a 6-digit PIN. You will use this PIN to access Objective Connect on this device only.
4. Enter your email address.
5. Enter your password and select Next.




Note: If you have enabled biometric authentication (such as Touch ID, Face ID or fingerprint scanner) on your device, the next time you log into Objective Connect, you will be prompted to unlock using biometric authentication. If this is disabled on the device your PIN can be used to login.

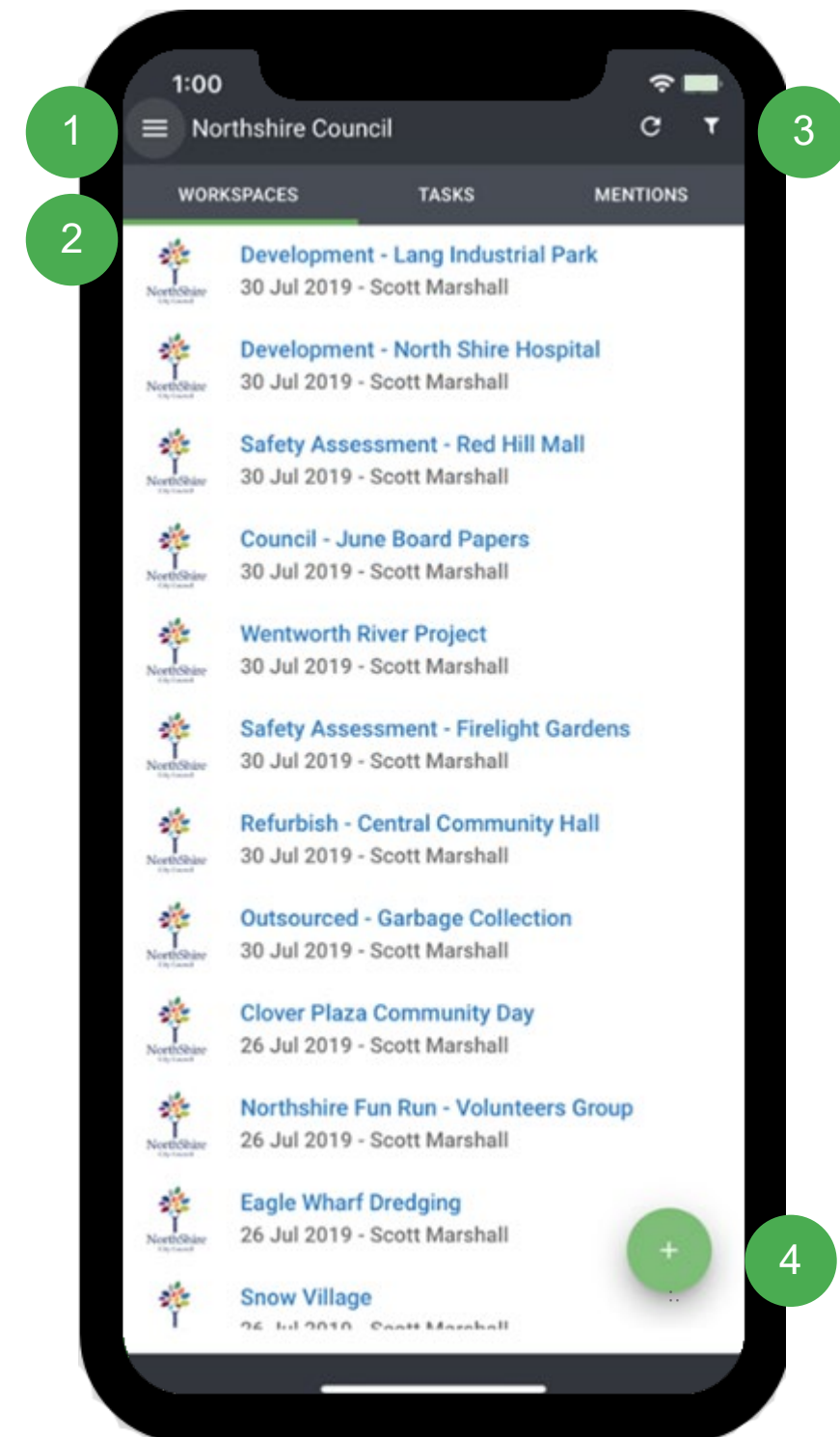


2. NAVIGATION

Navigation


Once logged in you will see all of the Workspaces that you have either created or been invited to in Objective Connect. To navigate through the Workspaces, simply scroll up or down.

1. Tap  to view the menu.
2. Tap the tabs to view:
 - **Workspaces** you have created or been invited to
 - View the **Tasks** you have created or been assigned
 - View all of the **Comments** you have been mentioned in
3. Tap  in the top right of the screen to **filter** or **sort** the Workspaces.
4. Depending on the screen you are on, tap  to add new Workspaces, Folders, Documents, Participants, Tasks or Comments.




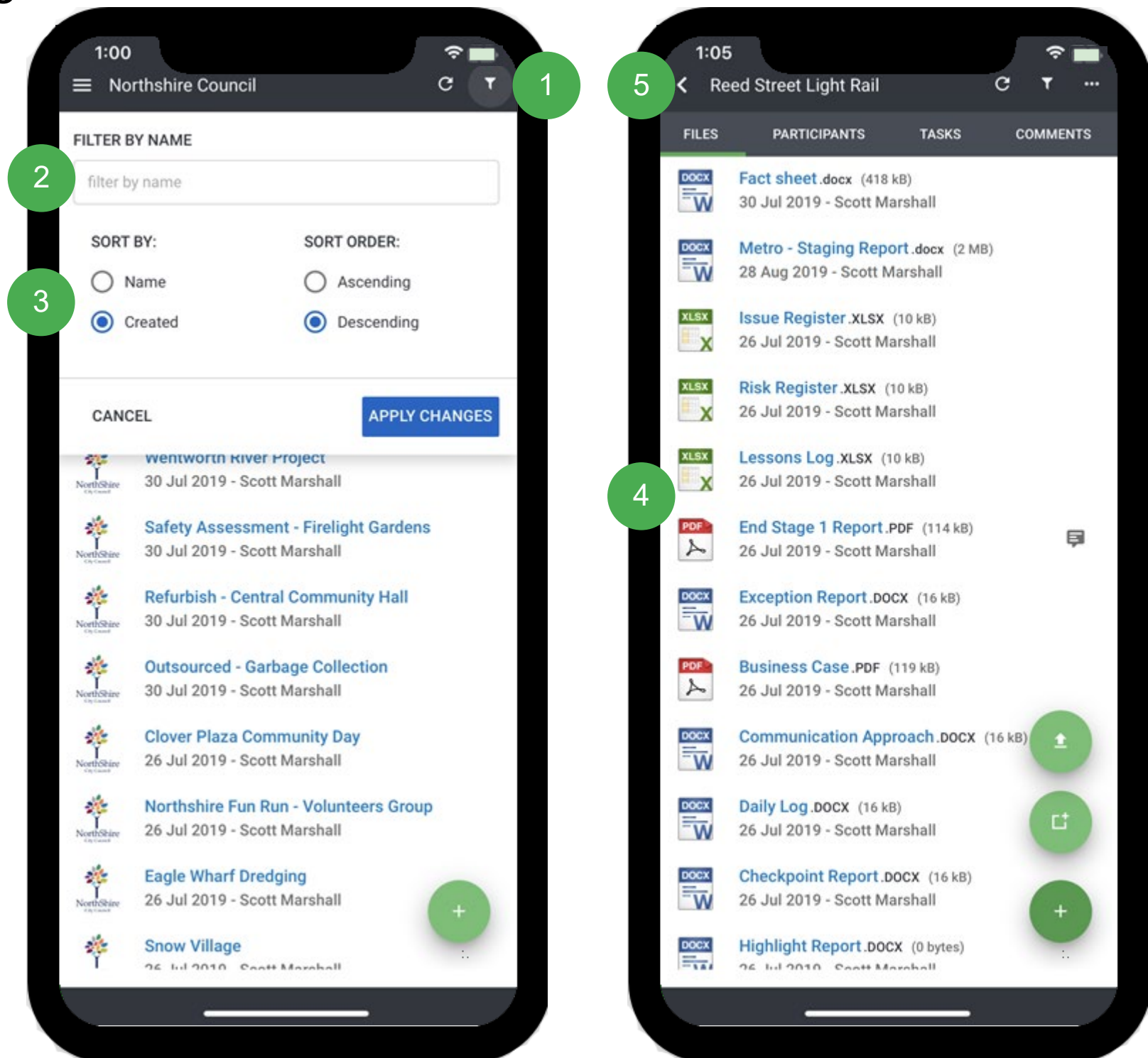
Filtering, sorting and previewing

To filter or sort the Workspaces displayed on your device:

1. Select  in the top right of the screen to filter or sort the Workspaces by **Name** or **Created date**.
2. Enter a **filter** text to view Workspaces containing that text in their name.
3. Sort the Workspace list by **name** or created **date** in the ascending or descending order.

Tap the name of a Workspace to access its contents. To navigate through the documents in the Workspace simply scroll up or down.

4. To preview any document or image, simply tap the document name.
5. To return to the Workspaces list tap .



3. WORKSPACES

Managing Workspaces

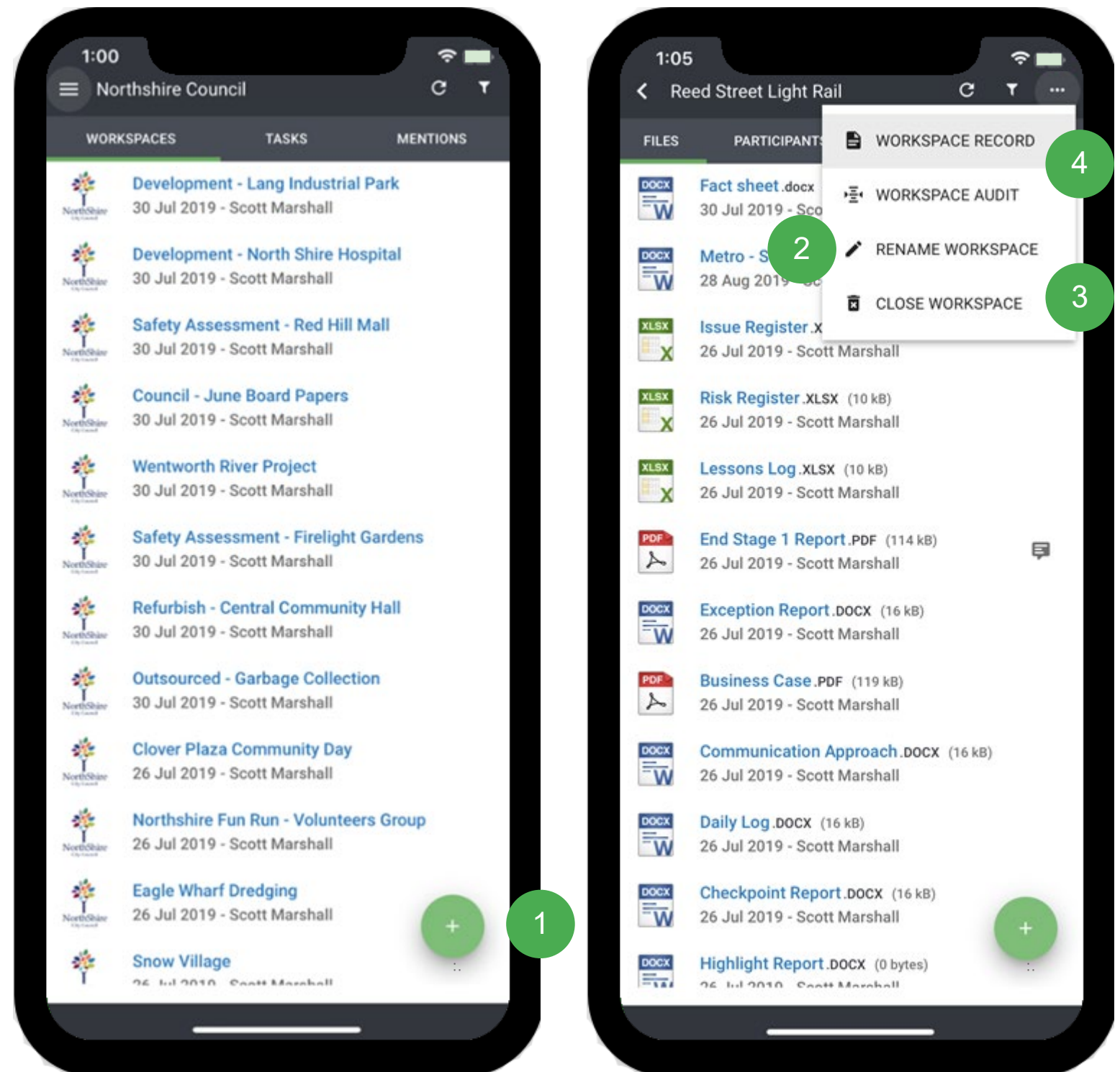
New Workspaces can be created directly from your mobile device.

1. In the Workspaces tab, tap . When prompted, add a Workspace name and select **Create**.

Once created, this Workspace will also be available from Objective Connect via your internet browser.



Tap  to the right of the Workspace name to:

2. Rename a Workspace.
3. Leave or Close a Workspace. If you close a Workspace, you will be prompted to enter a message for the other Participants of that Workspace.
Note: when a Workspace is ended the content, including all documents, comments and tasks will be deleted.
4. Create a Workspace Record (in Objective Connect Enterprise edition only) or a Workspace Audit report.





4. DOCUMENTS

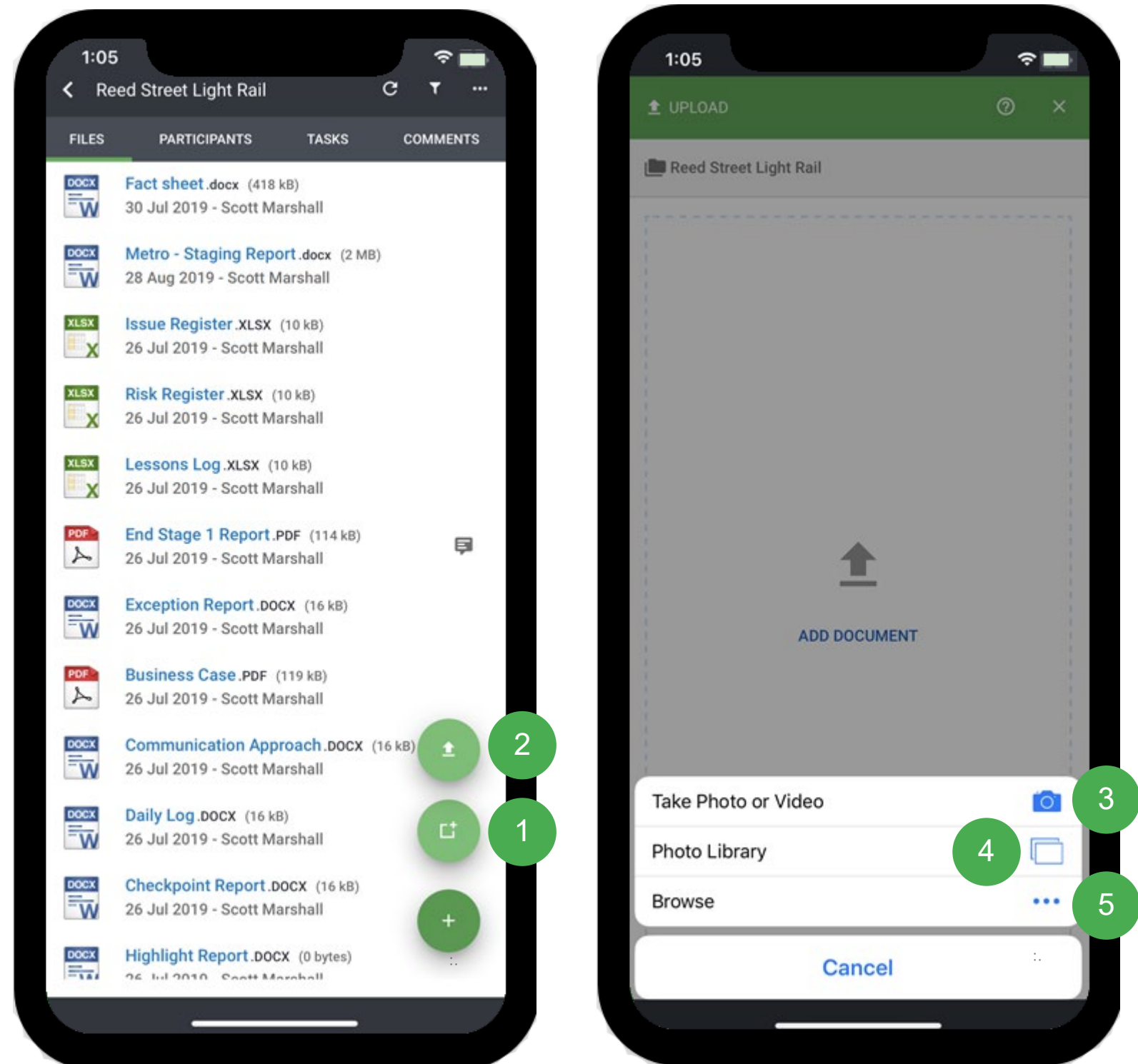
Adding Documents

1. To add folders, navigate inside the Workspace and tap and . Select  and then Create Folder.


Documents can also be added to a Workspace from your device. These include images from your camera, photo library or cloud storage services:

2. Tap  and  in the top right of the screen and then tap Add Document.
3. Tap Take Photo or Video to take a photo from your camera that will added to the Workspace.
4. Tap Photo Library to add an image to the Workspace from your photos.
5. Tap Browse to add a document from your cloud storage

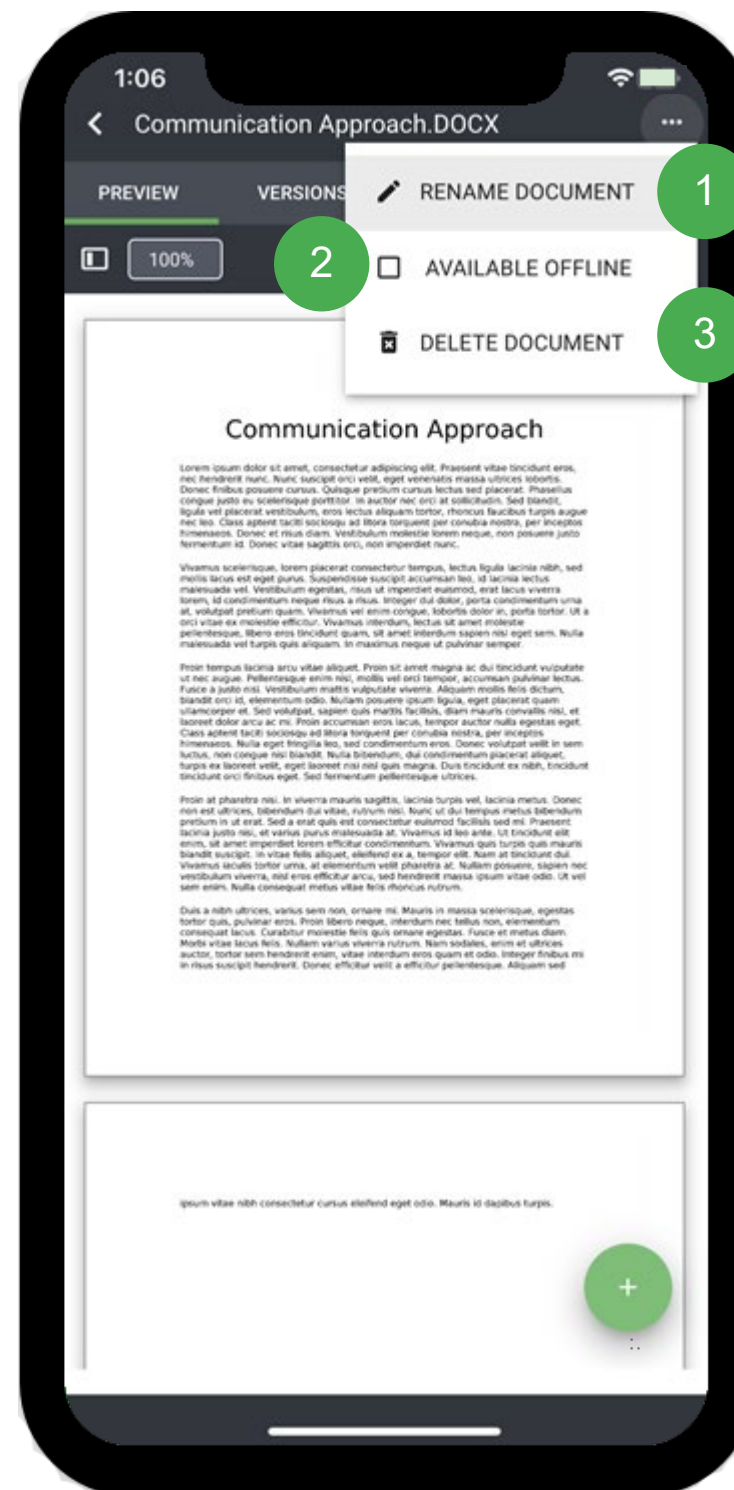
Once added the documents will be available from Objective Connect via your internet browser.



Managing Documents

Depending on your Workspace permissions, tap  to the right of the document name to:

1. Rename a document. You will then be prompted to add a new name for the document
2. Make a document available offline. An offline document can be previewed even when the device is out of internet range
3. Delete a document.
4. Depending on your permissions, tap the tabs to
 - Preview a document.
 - View its versions and open a previous version.
 - View and act on your tasks for that document.
 - Add comments.




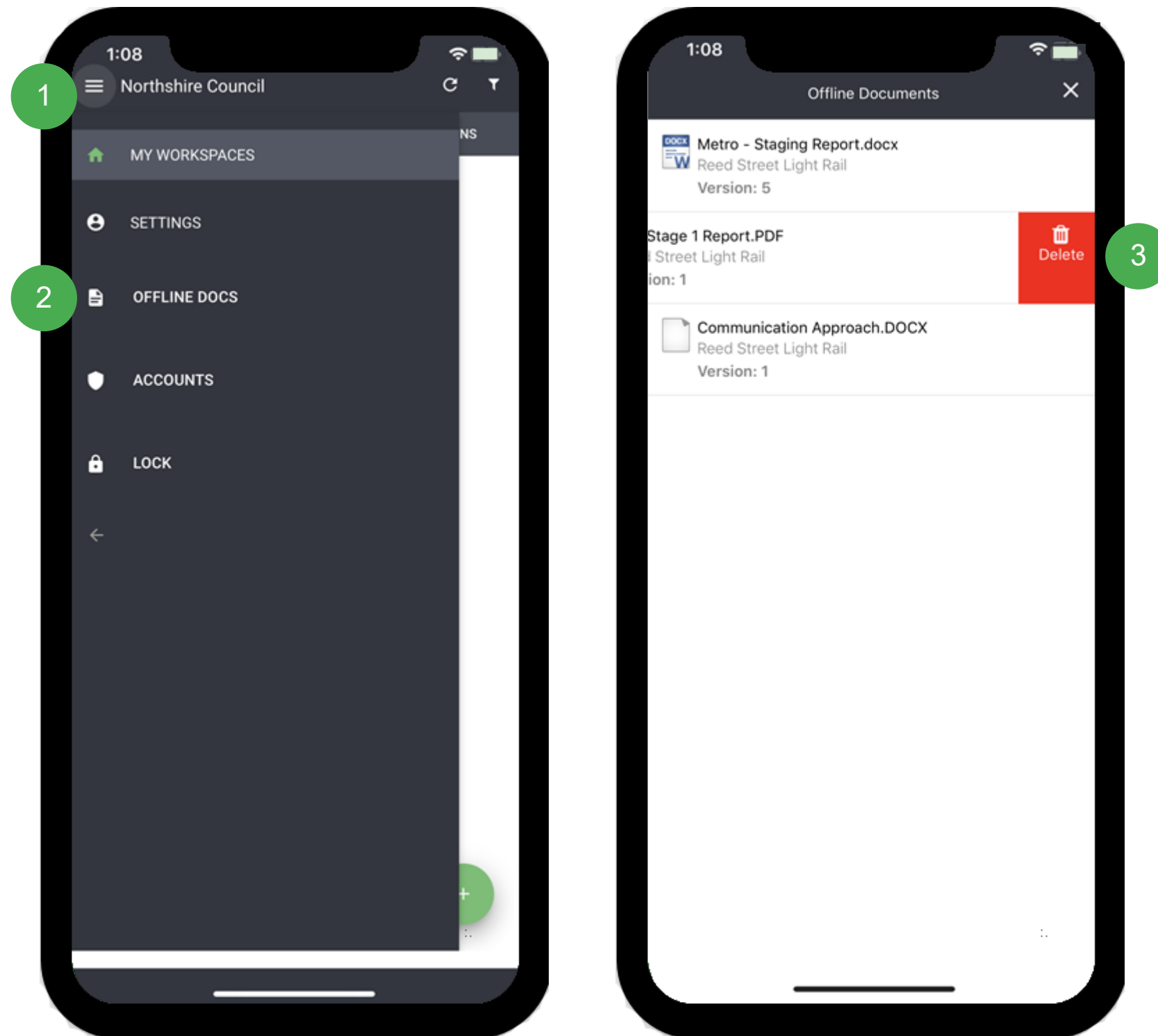
Managing Offline Documents

As you browse through your documents, they are securely cached with encryption in your app. When you go offline, you can view your cached documents (documents not cached will appear grayed out). Cached documents will **not** be displayed in your **Offline Docs**.

Note that only the document's pages that you've viewed will be cached. To ensure that you have access to the complete document, we recommend that you make it **Available Offline**.

To view a complete list of documents that have been marked for Offline Access on the device, from any Workspace:



1. Tap the menu  in the top left hand corner.
2. Select **Offline Docs**. All offline documents on this device will be listed.
3. To remove an offline document from your device, swipe on the document name and then select **Delete**.

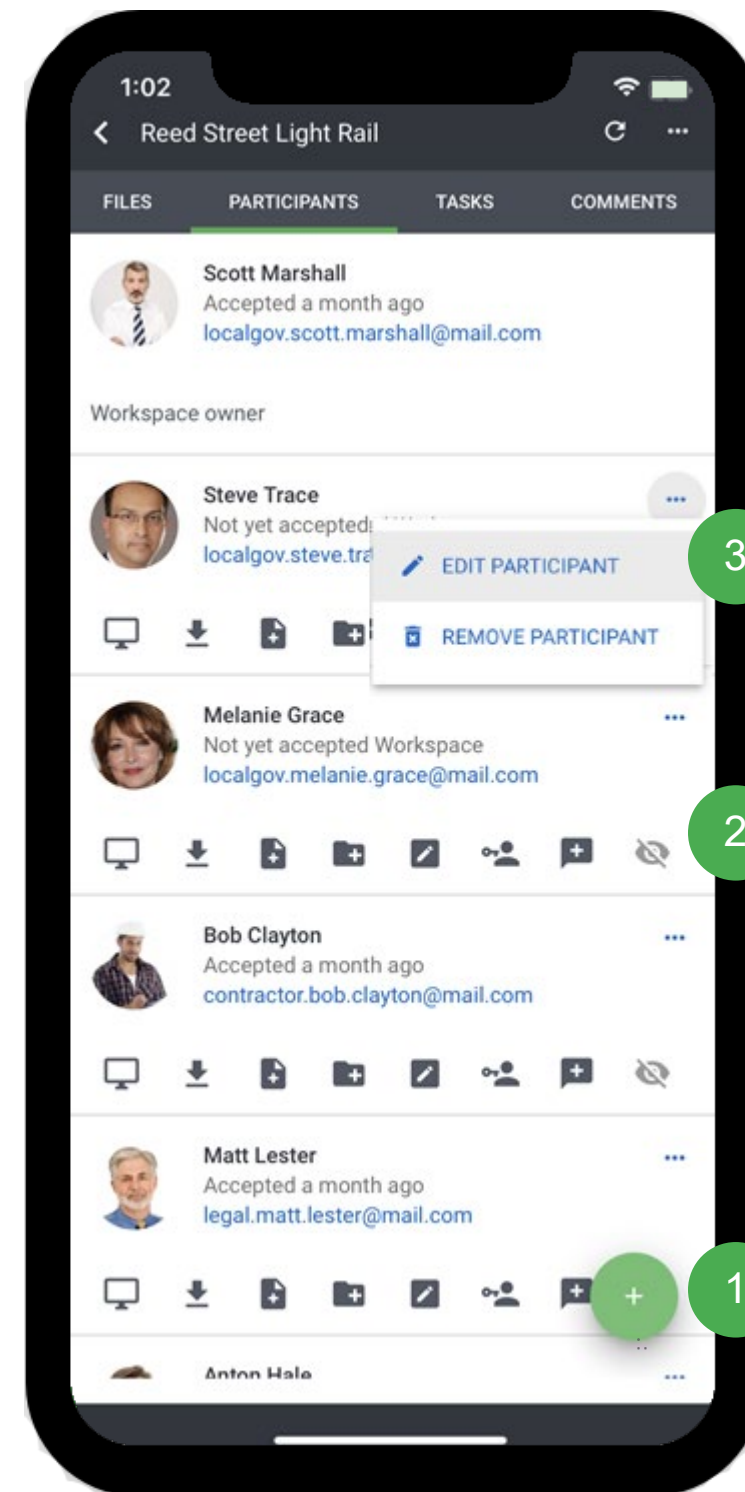


5. PARTICIPANTS, TASKS AND COMMENTS

Managing Participants



Depending on your permissions, you are able to:

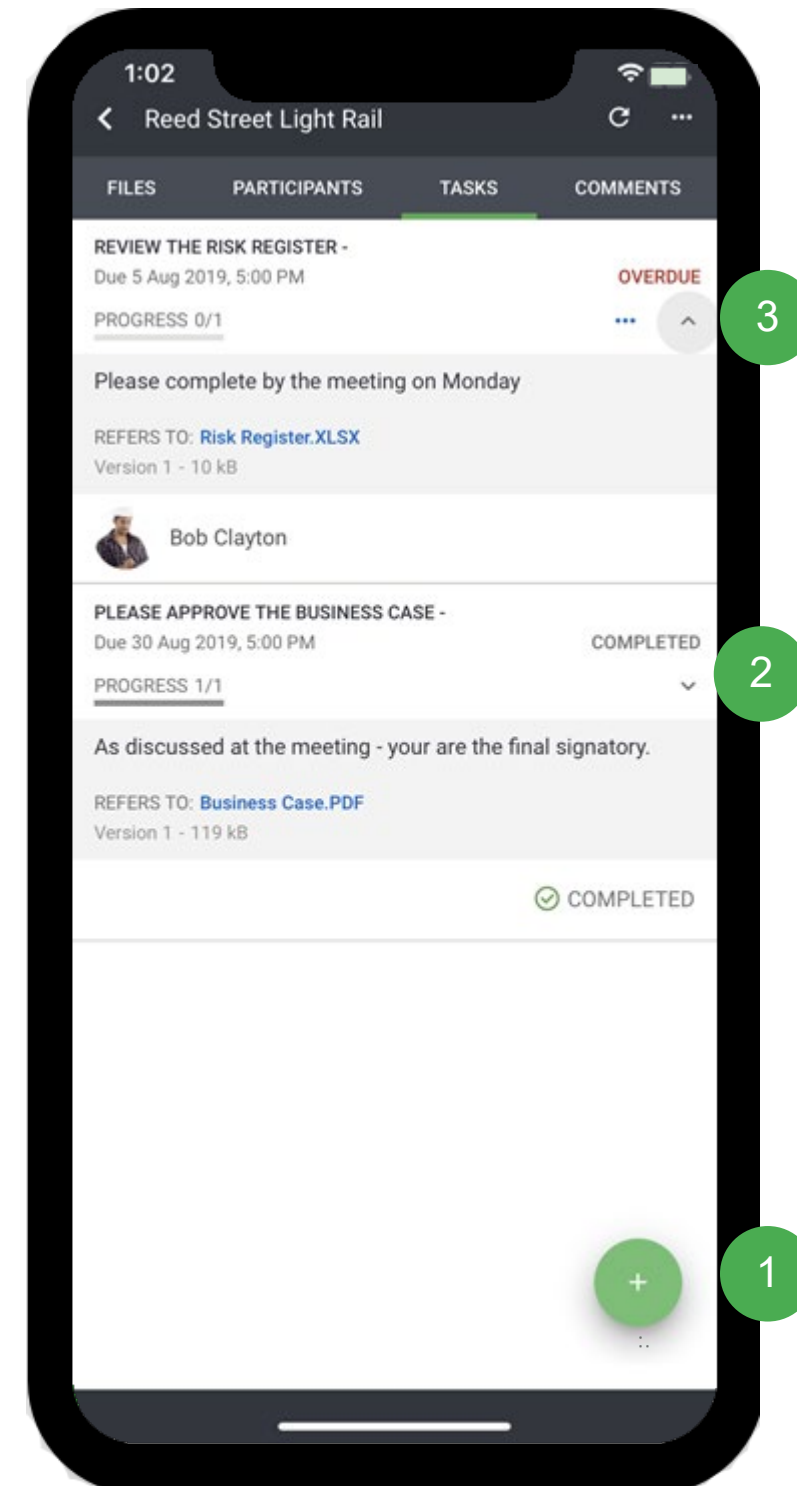
1. Select  to invite participants to a workspace.
2. View workspace abilities for a participant.
3. Select  and **edit** workspace abilities for a participant or **remove** the participant from the workspace.



Managing Tasks


Depending on your permissions, you are able to:

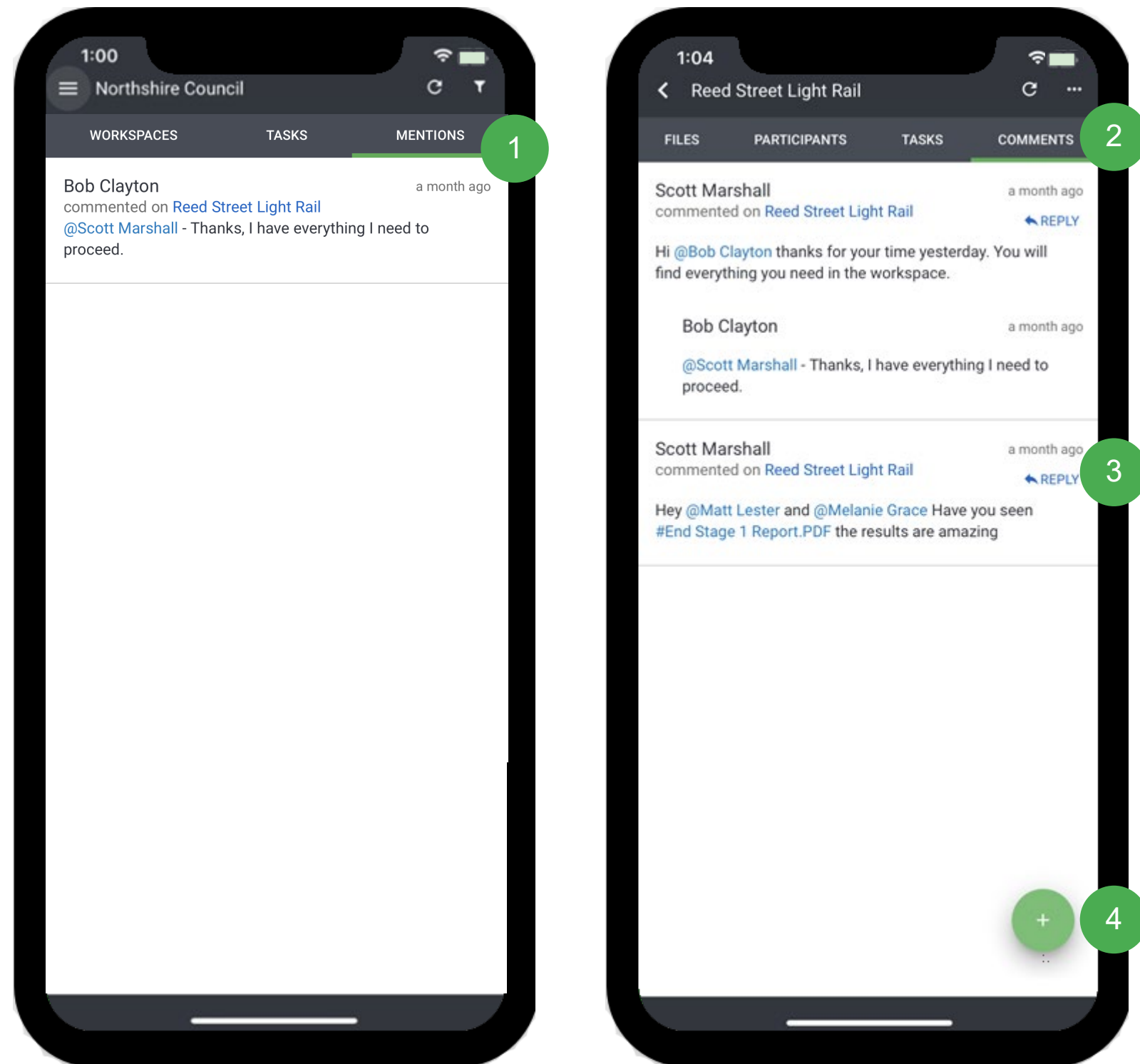
1. Select  to create a task.
2. Check the progress of a task or take an action.
3. Select  and cancel a task.



Managing Comments

Comments displayed depends on which screen you are on:

1. When you are viewing a list of all Workspaces, you can see only those comments on which you have been mentioned in the **Mentions** tab.
2. When inside a Workspace or on a document, you can view all **Comments** for that Workspace or document respectively.
3. For any comment, you can **reply** to it, use **@** and mention another participant or use **#** and refer a document in the Workspace.
4. Select  and add new comments.




6. SECURITY

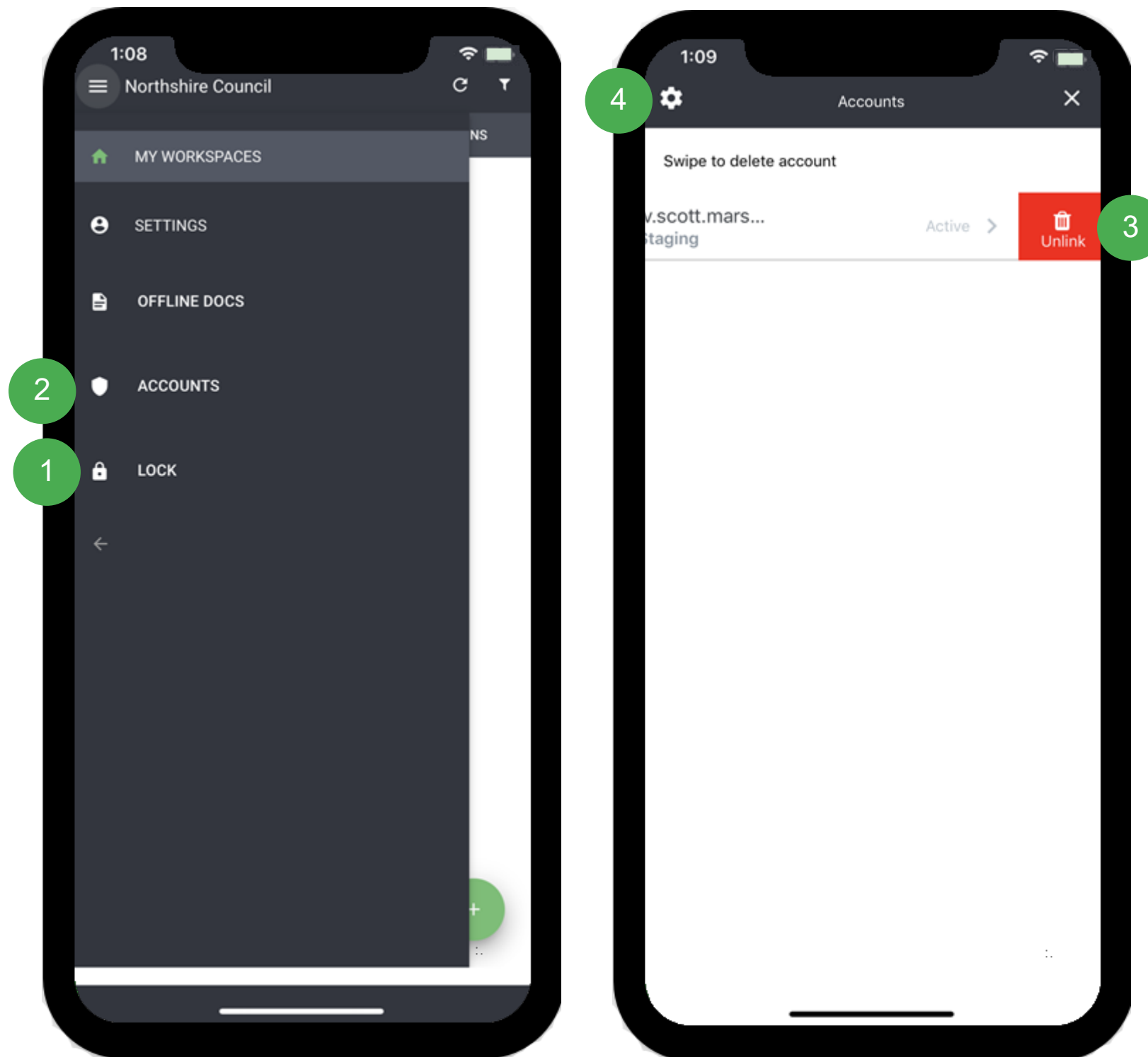
Security Settings

To access the security settings tap the menu in the top left of the screen:

1. Lock will return you to the PIN entry screen
2. Select **Accounts** to unlink your account or change PIN.

Once you have accessed the accounts area you can:

3. Swipe to **remove** the Objective Connect account from the device and clear all offline documents
4. Tap  to change your PIN.





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.

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 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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