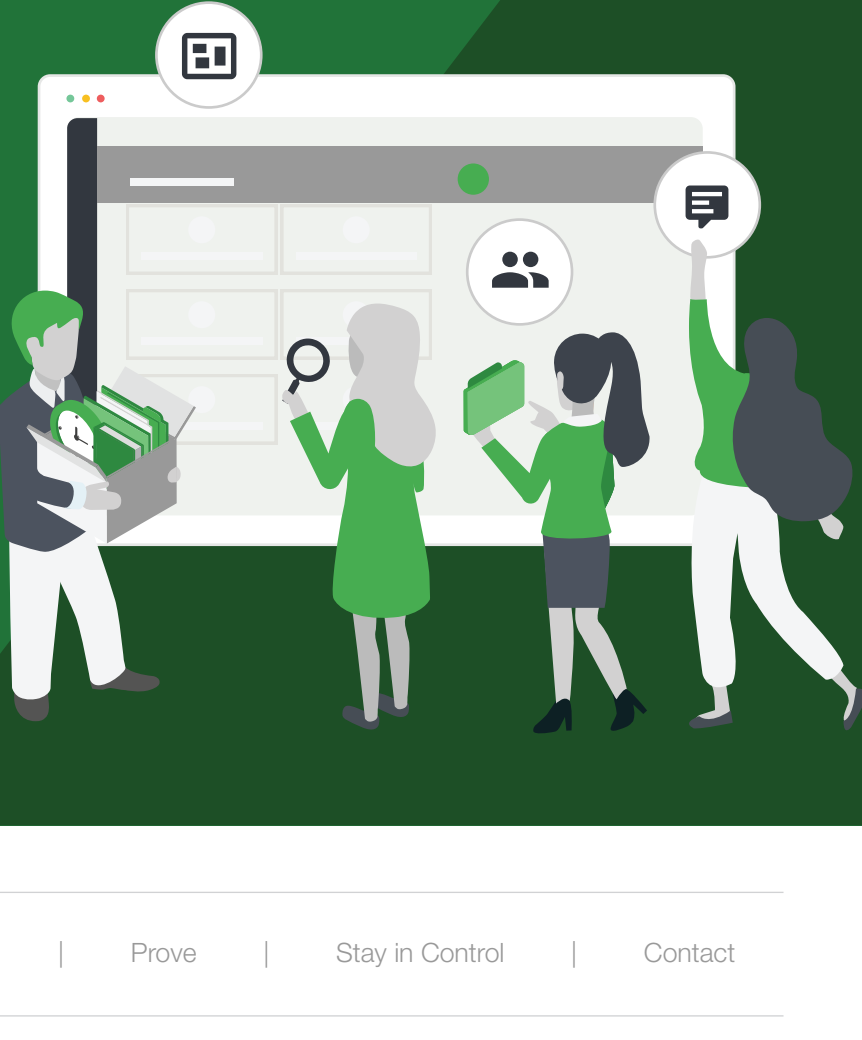


GETTING STARTED GUIDE



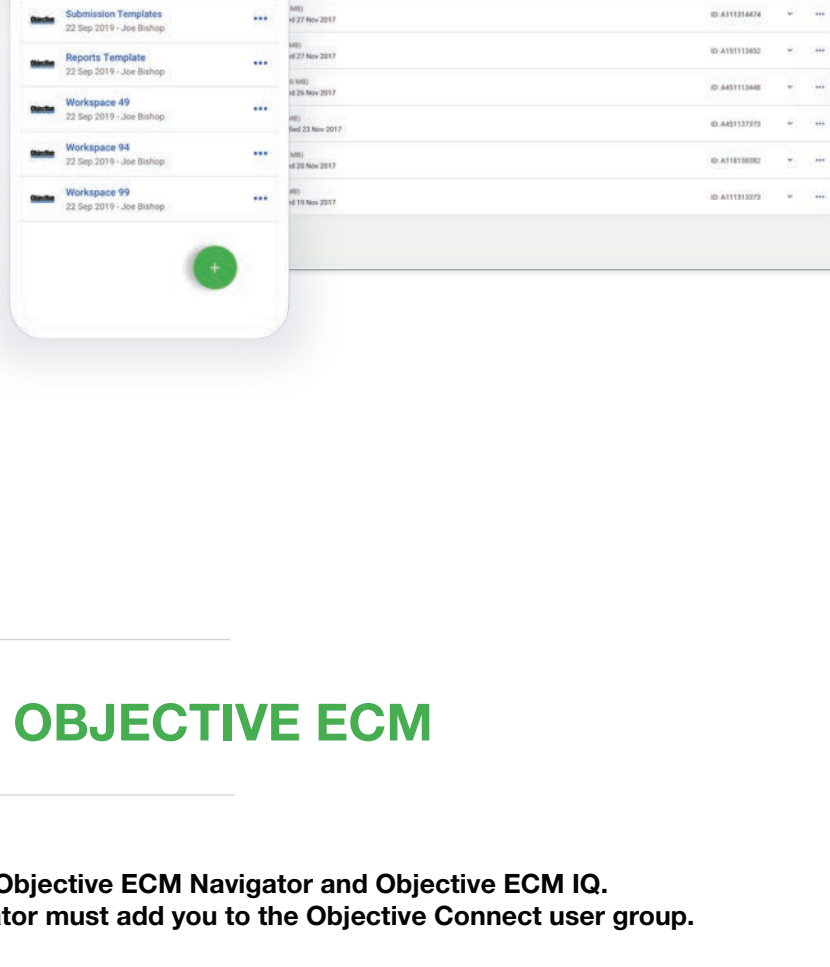
Create | Invite | Collaborate | Prove | Stay in Control | Contact

What is Objective Connect?

Designed specifically for government and regulated industries, Objective Connect is a secure external file sharing application that gives complete control over the information you share outside your organisation.

Share documents with 3 to 300 people in a single Workspace. Stay one step ahead with real-time updates and courtroom-ready audit reports: prove who accessed, downloaded, contributed to or shared your information.

Each Workspace is created directly from an Objective ECM folder and then accessible anywhere, anytime - all you need is a browser and the internet. You can then invite your trusted external partners, suppliers and citizens to collaborate on documents, capture conversations and control tasks. Each time you add or update a document in Objective ECM, it is available in the Workspace. If documents are added to the Workspace they are instantly synchronised to Objective ECM.



CREATE FROM OBJECTIVE ECM

Workspaces can be created from both Objective ECM Navigator and Objective ECM IQ. To get started your Objective ECM Administrator must add you to the Objective Connect user group.

Create a Workspace from Objective ECM Navigator

Right-click on a folder or file in ECM Navigator to create a Workspace. There are two types of Workspace:

1.Share Collaboration: Will synchronise all documents, including aliased documents, in the folder, even if they have a status of Draft

2.Share Publication: Will only synchronise documents, including aliased documents, that have a status of Published. This type of workspace also blocks the ability for external users to upload new documents or create new versions of documents.

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

Before any documents are synchronised to the Workspace, a thorough security-check occurs:

Permissions: Your Objective ECM permissions will pass to the Workspace. If there are documents in the folder you cannot see, they will not be synced. If you cannot edit documents you, anyone participating in the Workspace will not be able to edit.

Caveats: If a Caveat has been applied to a document, and you have not been added to the caveat, the document will not sync.

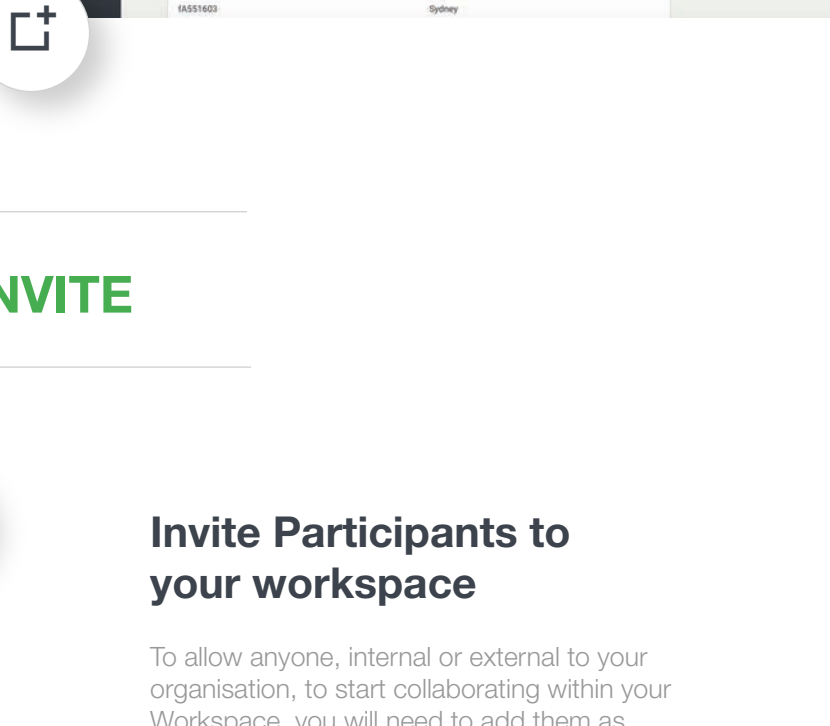
Security Classification Level: If a security classification level has been applied to a document that blocks external use, the document will not sync.

Create a Workspace from Objective ECM IQ

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

1. Click the ... menu on a folder. Then select either Publication or Collaboration Workspace.

As above your permissions, caveats and classifications will be checked. Depending on the security configuration of Objective ECM, you may be asked to enter your Objective ECM password.



INVITE

Invite Participants to your workspace

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

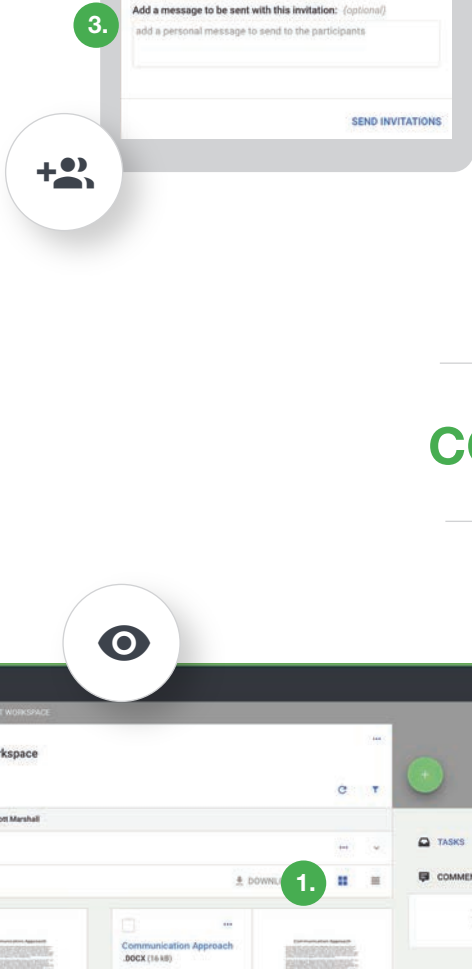
When Workspace is first created, Objective Connect will launch the Invite Participant blade.

1. Enter the email addresses of the people you want to collaborate with. It is free for them to use Objective Connect and only takes a minute to sign-up.

2. Control the abilities each participant will have within the Workspace. Preview is the default Ability. If no other Ability is selected the Participants will be prevented from downloading local copies of your documents

3. Type a message in the message box. Invitees will receive this by email.

Click Send Invitations to complete the invitation.



COLLABORATE

Preview documents

All of the documents synchronised from ECM are now visible in the Workspace.

1. Switch between the List and Grid views to view a thumbnail image of each document

2. To view the contents of a document without downloading, simply click on it. You can view Word, PowerPoint, Excel, PDF, video and image files in the browser.

If you have not given the ability to download a document, their preview will be watermarked with your organisation name, their email address and a time stamp.

Upload documents

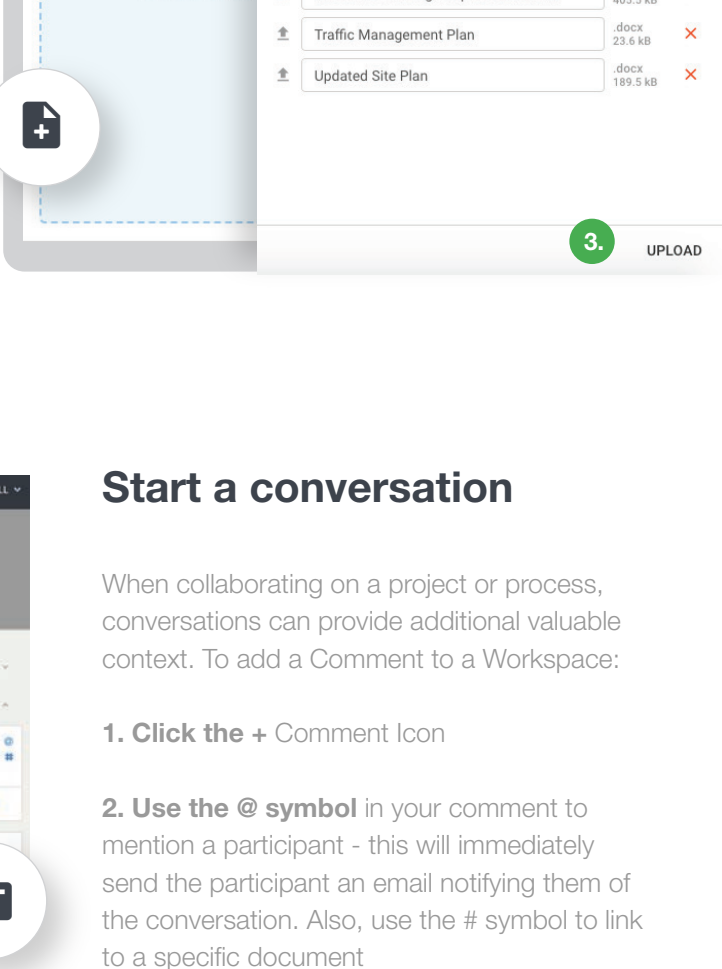
If you have given the ability to a Participant to upload documents, all they need to do is click the green + icon and select Upload.

1. Documents can either be dragged onto the blade or selected using the Browse button.

2. Files can be renamed before uploading

3. Click upload, and the documents will be available for everyone participating in the Workspace.

Any document uploaded to the Workspace will automatically be synchronised to ECM.



Start a conversation

When collaborating on a project or process, conversations can provide additional valuable context. To add a Comment to a Workspace:

1. Click the + Comment icon

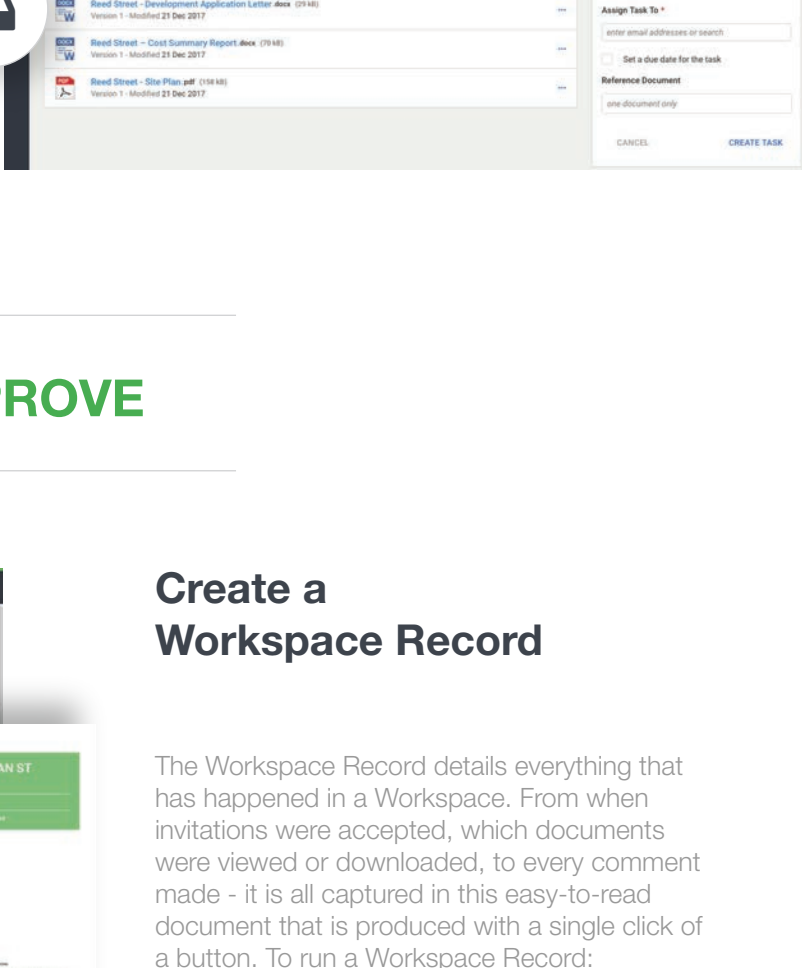
2. Use the @ symbol in your comment to mention a participant - this will immediately send the participant an email notifying them of the conversation. Also, use the # symbol to link to a specific document

Manage Tasks

Tasks deliver complete transparency to everyone involved, including precisely who was asked to do what and when. To add a Task:

1. Click the + Task icon

2. Add the relevant details such as who needs to complete the Task and due date. An email will be sent to the assigned Participants notifying them of the Task. A follow-up reminder email automatically is sent if a Task is not completed by the due date.

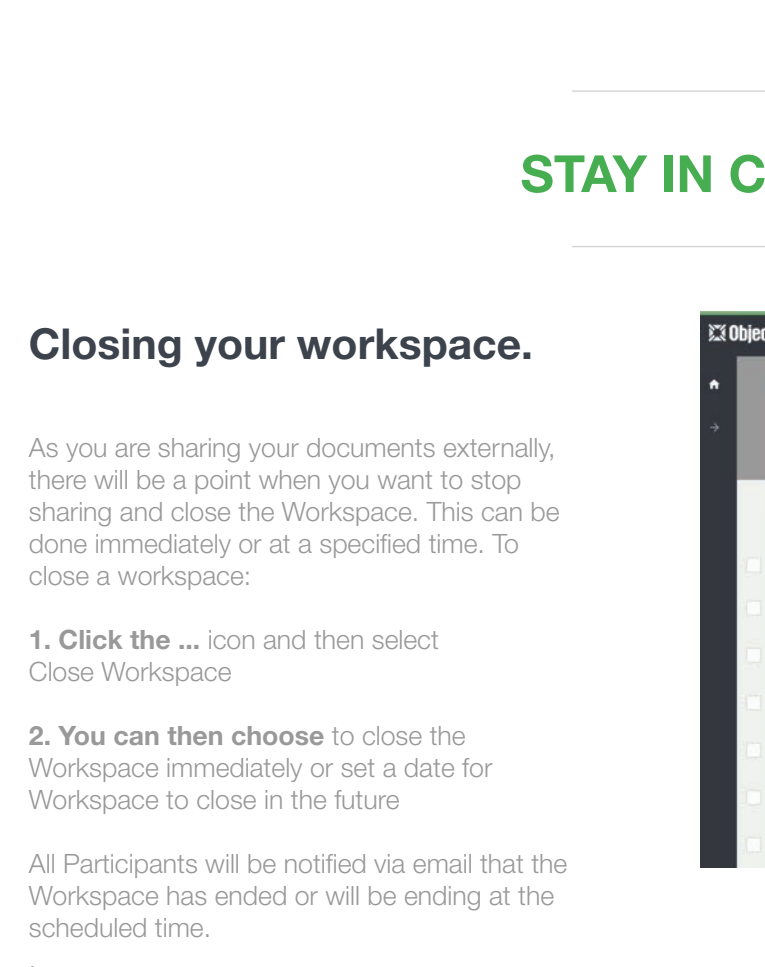


PROVE

Create a Workspace Record

The Workspace Record details everything that has happened in a Workspace. From when invitations were accepted, which documents were viewed or downloaded, to every comment made - it is all captured in this easy-to-read document that is produced with a single click of a button. To run a Workspace Record:

1. Click the ... icon and then select Workspace Record.



STAY IN CONTROL

Closing your workspace.

As you are sharing your documents externally, there will be a point when you want to stop sharing and close the Workspace. This can be done immediately or at a specified time. To close a workspace:

1. Click the ... icon and then select Close Workspace

2. You can then choose to close the Workspace immediately or set a date for Workspace to close in the future

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



NEED MORE HELP FROM OBJECTIVE CONNECT?

Check out our Online Help Guide

help.objectiveconnect.com

OBJECTIVE CONNECT:
When you need to know who did what and when.

OBJECTIVE.COM/CONNECT

Objective