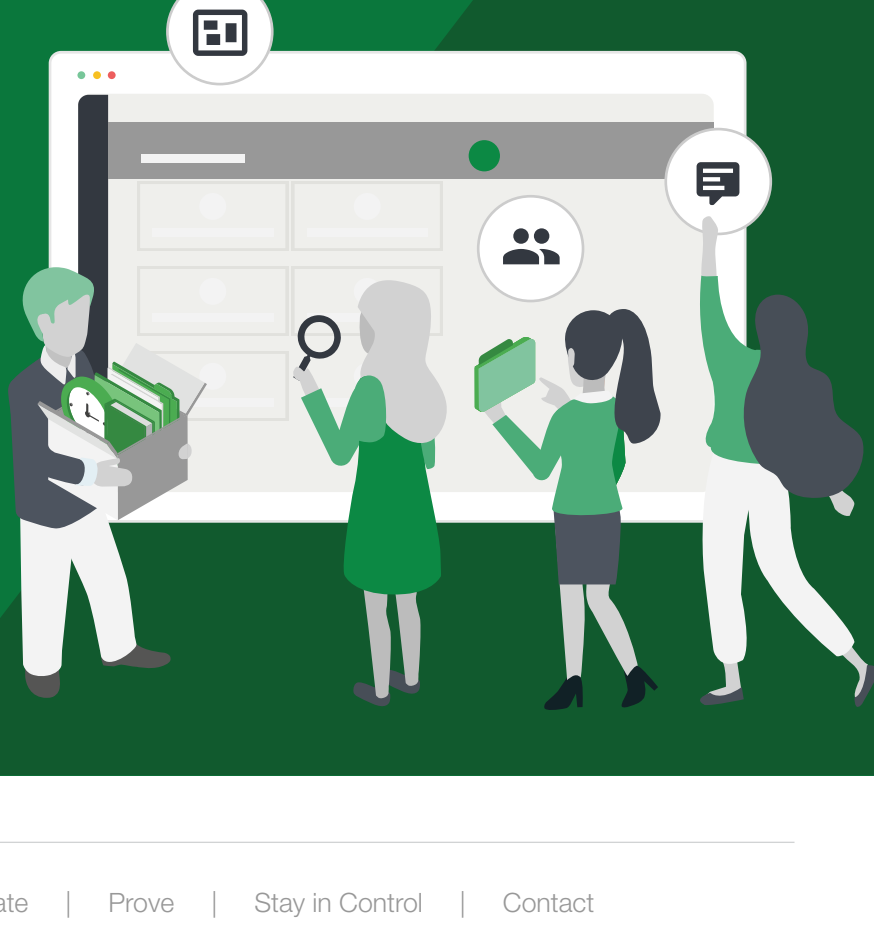


GETTING STARTED GUIDE

For Objective Connect + Content Manager



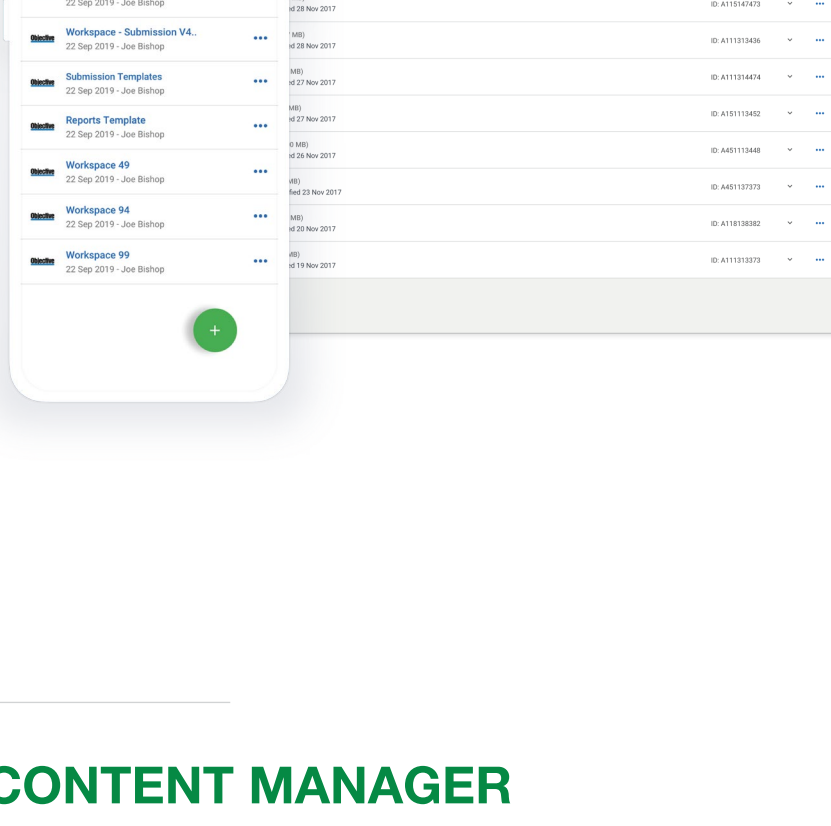
Create | Invite | Collaborate | Prove | Stay in Control | Contact

What is Objective Connect?

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

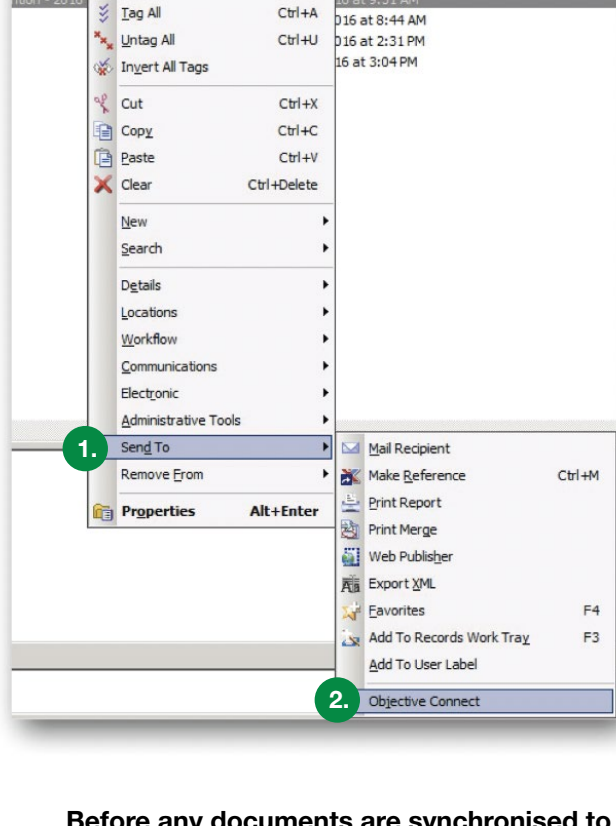
Share documents with 3 to 300 people in a single Workspace. Stay one step ahead with real-time updates and courtroom-ready audit reports; prove who accessed, downloaded, contributed to or shared your information.

Each Workspace is created directly from an Micro Focus Content Manager (Content Manager) folder can be accessed 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 Content Manager, it is available in the Workspace. If documents are added to the Workspace they are instantly synchronised to Content Manager.



CREATE FROM CONTENT MANAGER

Workspaces can be created from Content Manager. To get started your Content Manager Administrator must add you to the Objective Connect user group.



Create a Workspace from Content Manager

Right-click on a container within Content Manager to create a Workspace in Objective Connect (depending on configuration these names can change). The contents of the container will be synchronised with the Workspace in Objective Connect:

1. Right click and select **Send To > Objective Connect** to create a Workspace.

Depending on the security configuration, you may be asked to enter your Content Manager password.

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

Permissions: The Permissions of the Content Manager user creating the Workspace 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 or 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.

INVITE

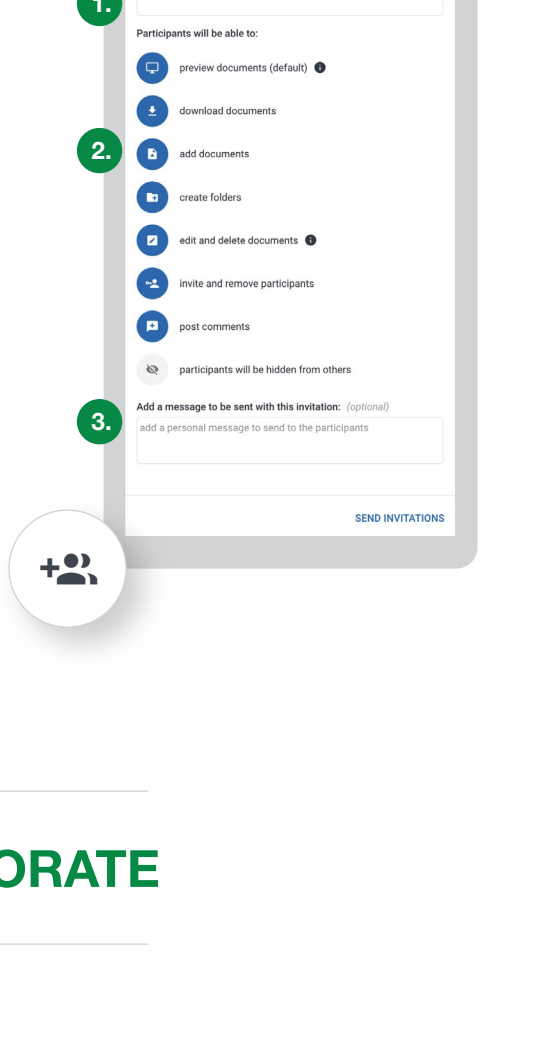
Invite Participants to your Workspace

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

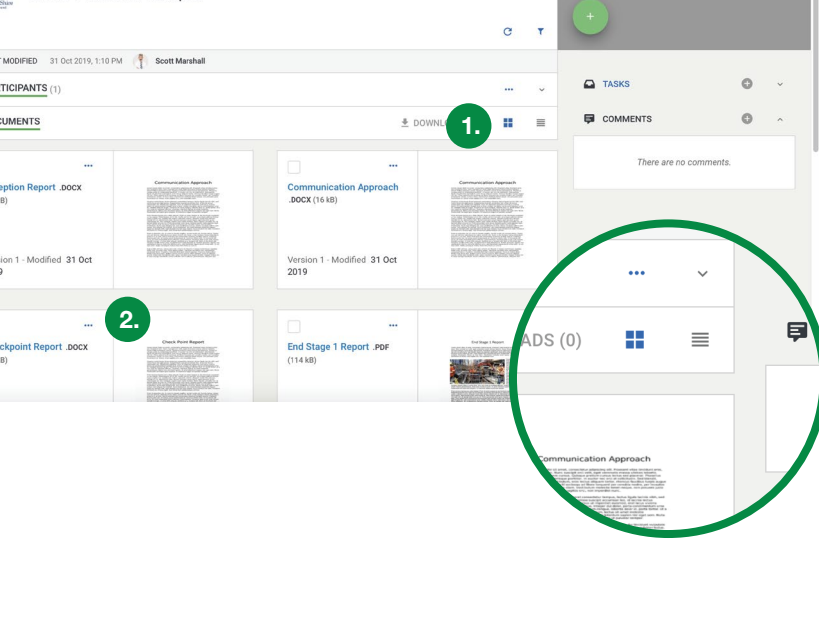
When Workspace is first created, Objective Connect will launch the Invite Participant blade.

- 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.
- 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.
- 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 Content Manager are now visible in the Workspace.

- Switch** between the List and Grid views to view a thumbnail image of each document.
- 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 Participant the ability to download a document, their preview will be watermarked with your organisation name, their email address and a time stamp.

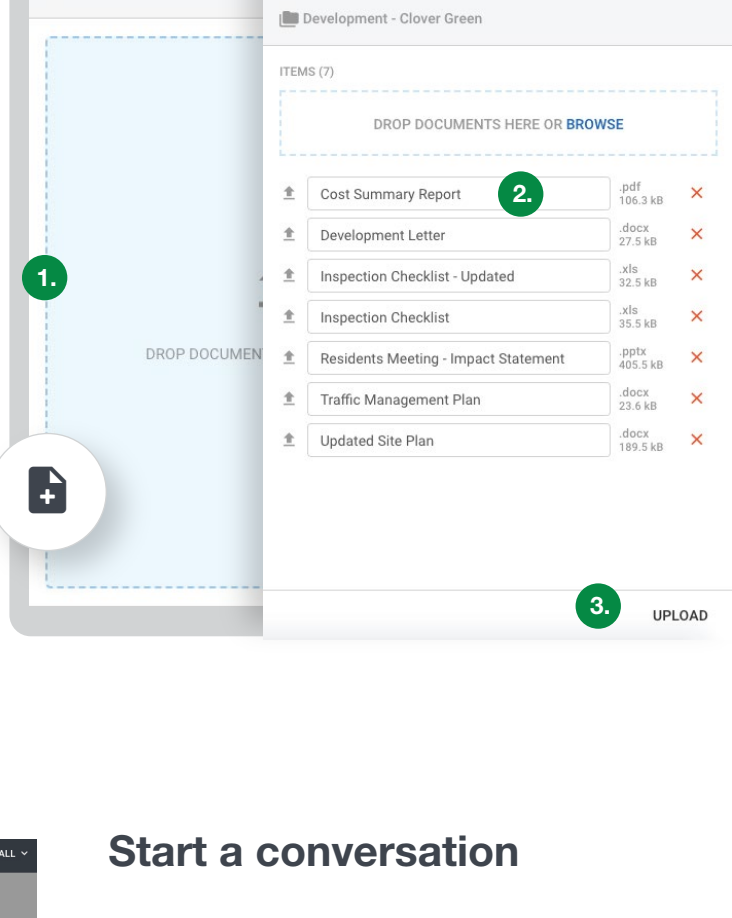
Upload documents

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

- Documents** can either be dragged onto the blade or selected using the Browse button.
- Files** can be renamed before uploading.

- Click upload**, and the documents will be made available to all Workspace participants.

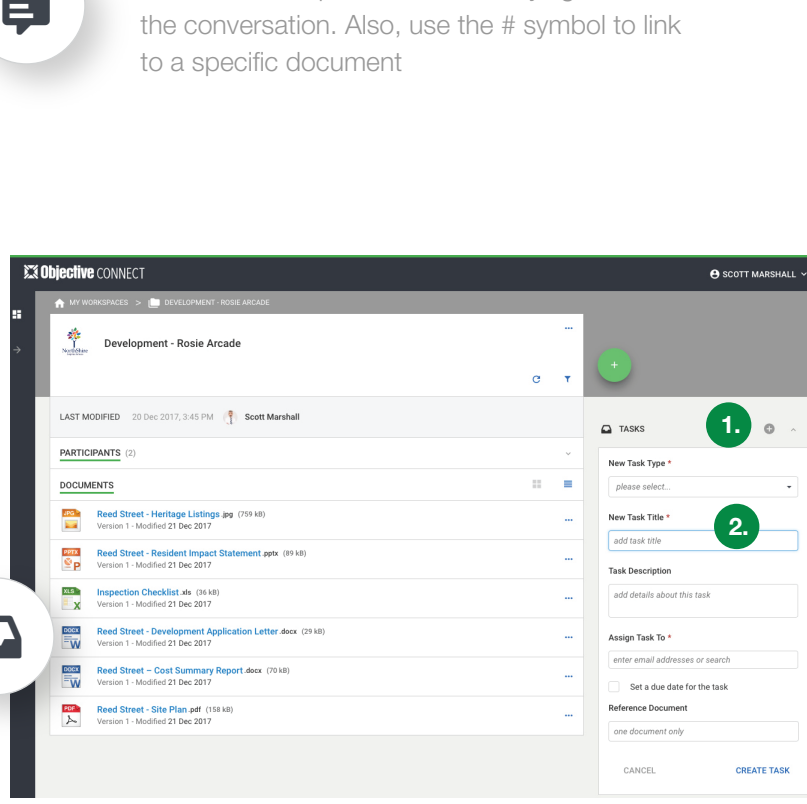
Any document uploaded to the Workspace will automatically be synchronised to Content Manager.



Manage Tasks

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

- Click the + Task** icon
- 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 is sent automatically 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:

- Click the ... icon** and then select Workspace Record.

STAY IN CONTROL

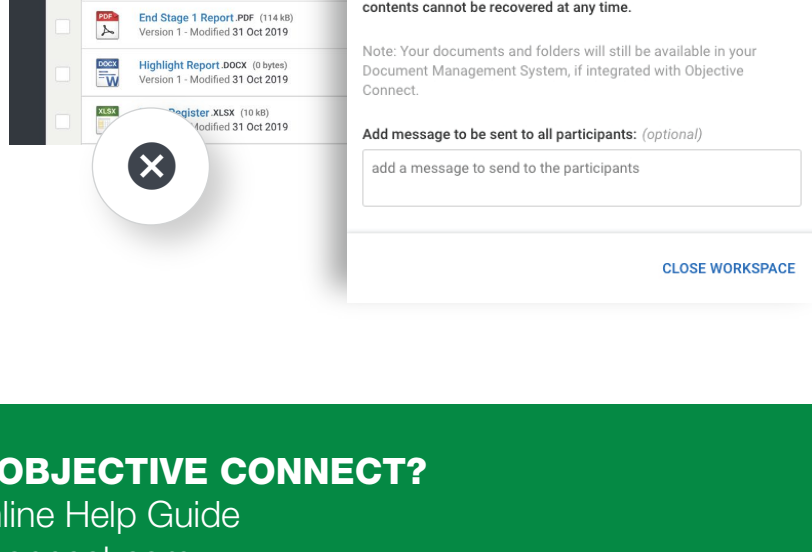
Closing your Workspace

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:

To close a Workspace:

- Click the ... icon** and then select Close Workspace
- You can then choose** to close the Workspace immediately or set a date for the 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 WITH 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