



DocMoto

Version 4 - What's New?

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Introduction

This document guides users and administrators through the user interface changes and new features in DocMoto version 4.

Updates:

User interface:

1. Tree-view and main integrated to one main view.
2. Tree-view replaced with side panel with collapsible section headers such as:
 - a. DocMoto – the three main areas:
 - i. Contents – main shared area
 - ii. Trash – user's trash bin
 - iii. Home – private area for user
 - b. Favourites – removed from toolbar and added to side panel to enable drag and drop, similar to the Finder application.
 - c. Recent Documents – lists documents most recently interacted with.
3. Tabbed user interface – create tabs for:
 - a. Different areas of DocMoto.
 - b. Searches
 - c. Views
 - d. Copying data from one area to another
4. Document control center – the details pane has been modified to show meta-data (system & business defined) with a useful integrated preview and document walker control.
 - a. Document walker control – when the control center is open the user has a limited view of the tree structures available; the document walker moves efficiently through a folders contents and potentially into a folders content.
5. Updated Customize Toolbar...options – ability to add more buttons to toolbar for functions not already included i.e. update document tags.
6. Tags (both folder and document) can be listed in order of preference.

Features:

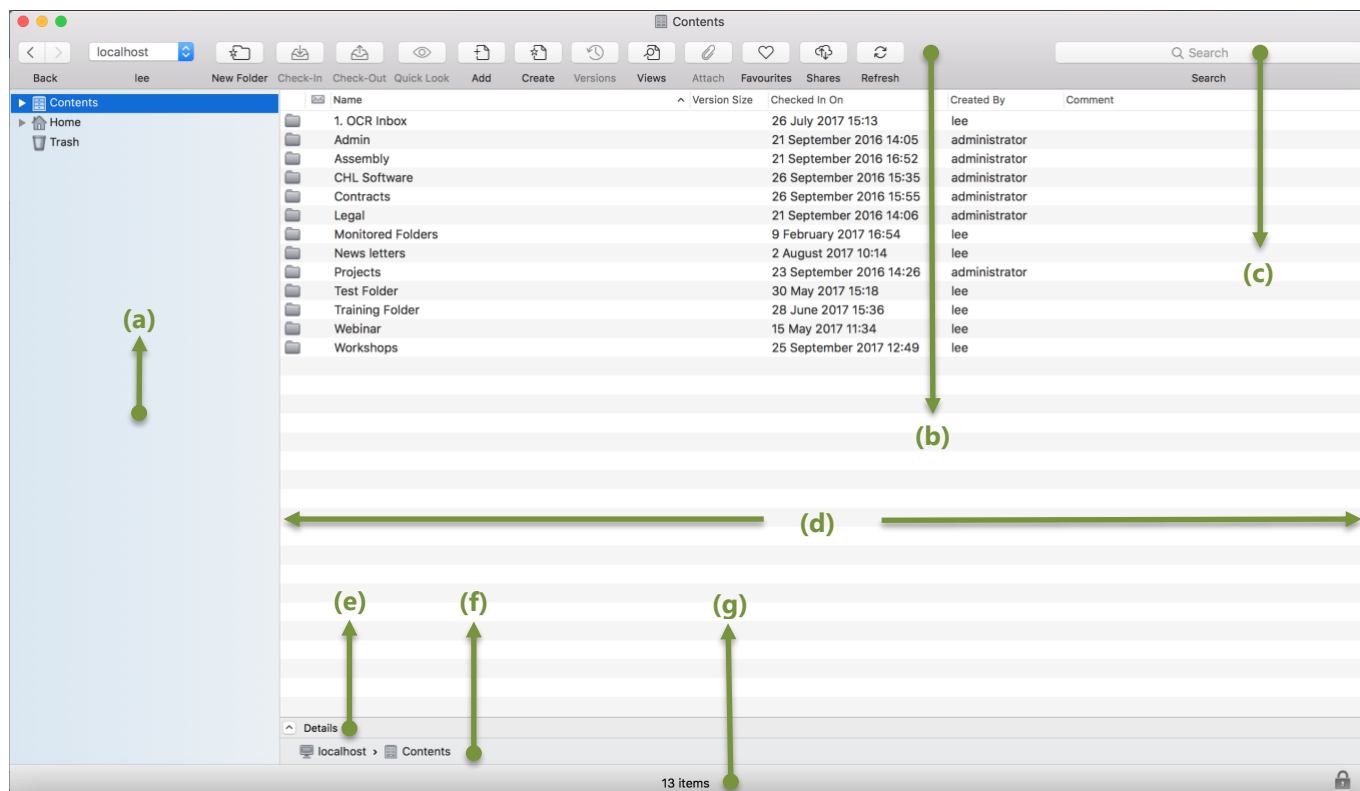
1. Email Importer Application. A comprehensive admin and user guide can be found [here](#).
2. Secure Share Notifications. Notification of third-party interactions with secure DocMoto shares.
3. Hardening. Administrators can set up failed authentication limits and number of downloads permitted.

Integrations:

1. Google Mail (Please contact CHL Software for more details).

User Interface:

Existing Version 3 GUI:



(a) Tree View Pane – Primarily for folder navigation; containing three distinct areas, namely:

- Contents – shared workspace
- Home – users private area
- Trash – users trash bin

(b) Toolbar – Quick and easy access to DocMoto’s most common functions. Fully customisable.

(c) Search – DocMoto’s search interface; supporting four keywords, namely:

- File Name
- Folder Name
- Content
- Tag

(d) Main View (pane) -Exposes the contents of any folder selected within the tree view. Displays five default columns (can be customised), namely:

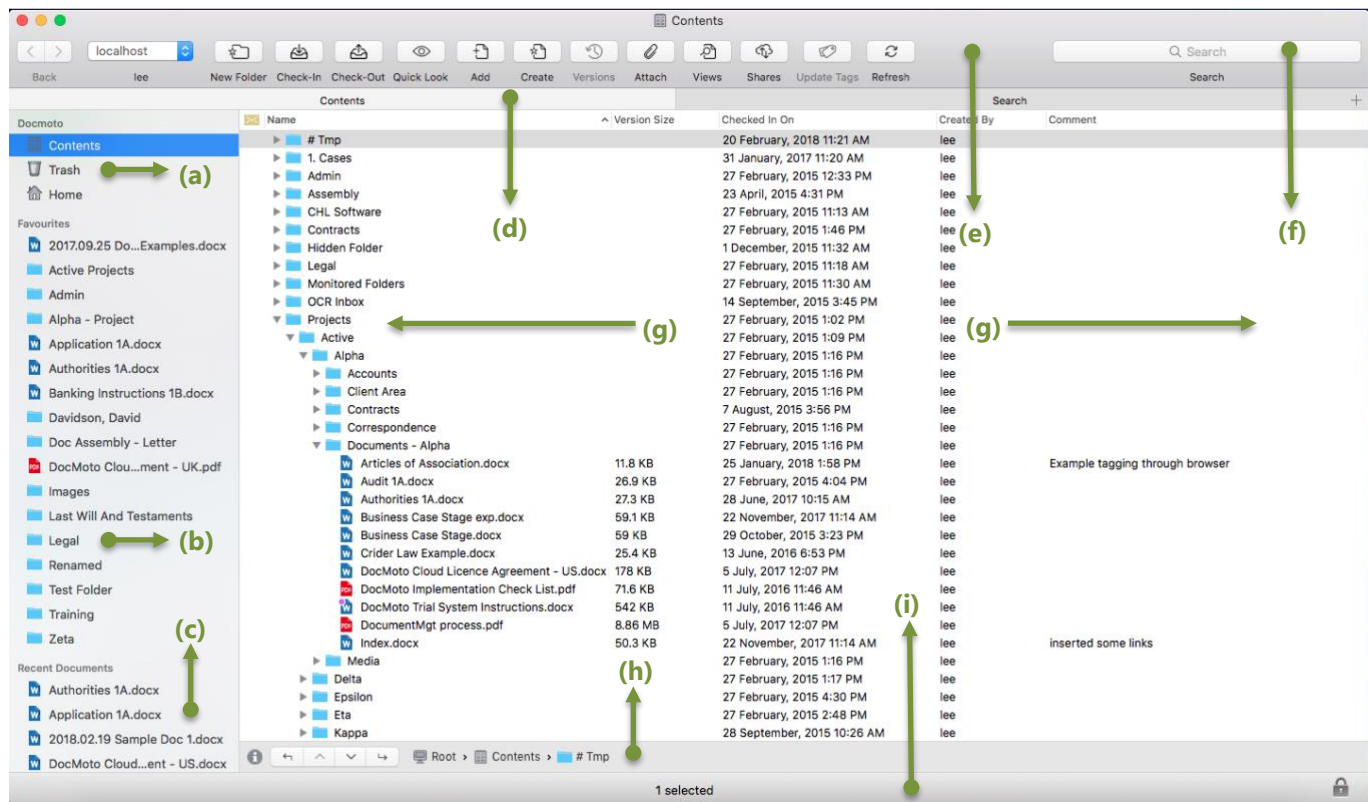
- Name
- Version Size
- Checked In On
- Created By
- Comment

(e) Detail Pane – Hidden slide draw displays the meta-data associated to the folder or file selected.

(f) Breadcrumb Trail – Displays the location of the item selected and is fully interactive i.e. if any item in the path is selected, DocMoto will auto navigate to the area.

(g) Status Bar – Reflects the number of items selected or available.

Version 4 GUI:



(a) + (b) + (c) **Side Panel** – comprising three sections; DocMoto areas, Favourites & Recent Documents. The Side Panel can be hidden or exposed.

(a) **DocMoto areas** – The three main areas within the DocMoto system:

- **Contents** – shared workspace
- **Home** – users private area
- **Trash** – users trash bin

(b) **Favourites** – Moved from the toolbar to the side panel to enable drag and drop in a similar fashion to the Finder application. DocMoto has retained the ability to mark items as favourites via the menu items (File menu & Right mouse click menu).

(c) **Recent Documents** – A list of all the recent documents (and folders) worked on.

(d) **Tab (control)** – A tab is a graphical control element that allows multiple documents (or folders, or panels) to be contained within a single interface. This is especially useful in large repositories.

(e) **Toolbar** – Quick and easy access to DocMoto’s most common functions. Fully customisable.

(f) **Search** - DocMoto’s search interface; supporting four keywords, namely:

- File Name
- Folder Name
- Content
- Tag

(g) **Main View** – The tree view and main view from version 3 have been integrated as one so documents and folders are nested and available through one interface. This makes copying and moving data within one view easier.

(h) **Info Pane** – hidden by default, comprising:

- **Breadcrumb Trail** - Displays the location of the item selected and is fully interactive i.e. if any of the items in the path is selected, DocMoto will auto navigate to the area
- **Document Walker** – An intelligent control enabling users to “walk” through documents within large folders when the info panel is extended
- **Details** – Meta data extracted from documents or user defined
- **Preview** – Document or Folder preview

(i) **Status Bar** - Reflects the number of items selected or available

Version 4 GUI – Side Panel:

The introduction of a side panel maximizes the viewable area within the main tree view. The side panel supports a slide in and out control. To hide the side panel:

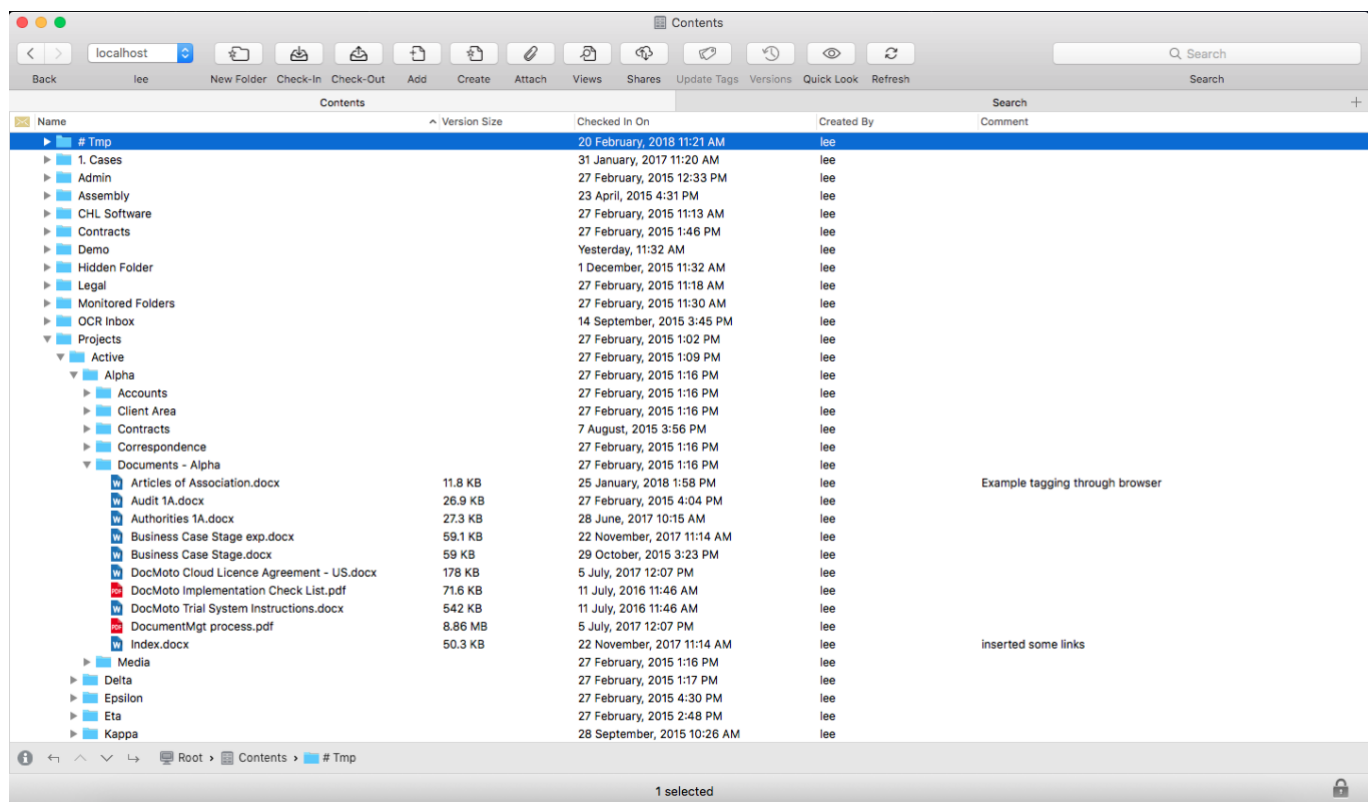
1. Place cursor over the line separator between the side panel and the main tree view. The cursor should change to the resize cursor.

Fig. Resize Cursor:



2. Slide the side panel to the left until it's hidden. See [Fig. Side Panel Hidden](#).

Fig. Side Panel Hidden:



Note: If the side panel is hidden, it is only hidden within the active tab. If another tab is opened the side panel is shown by default.

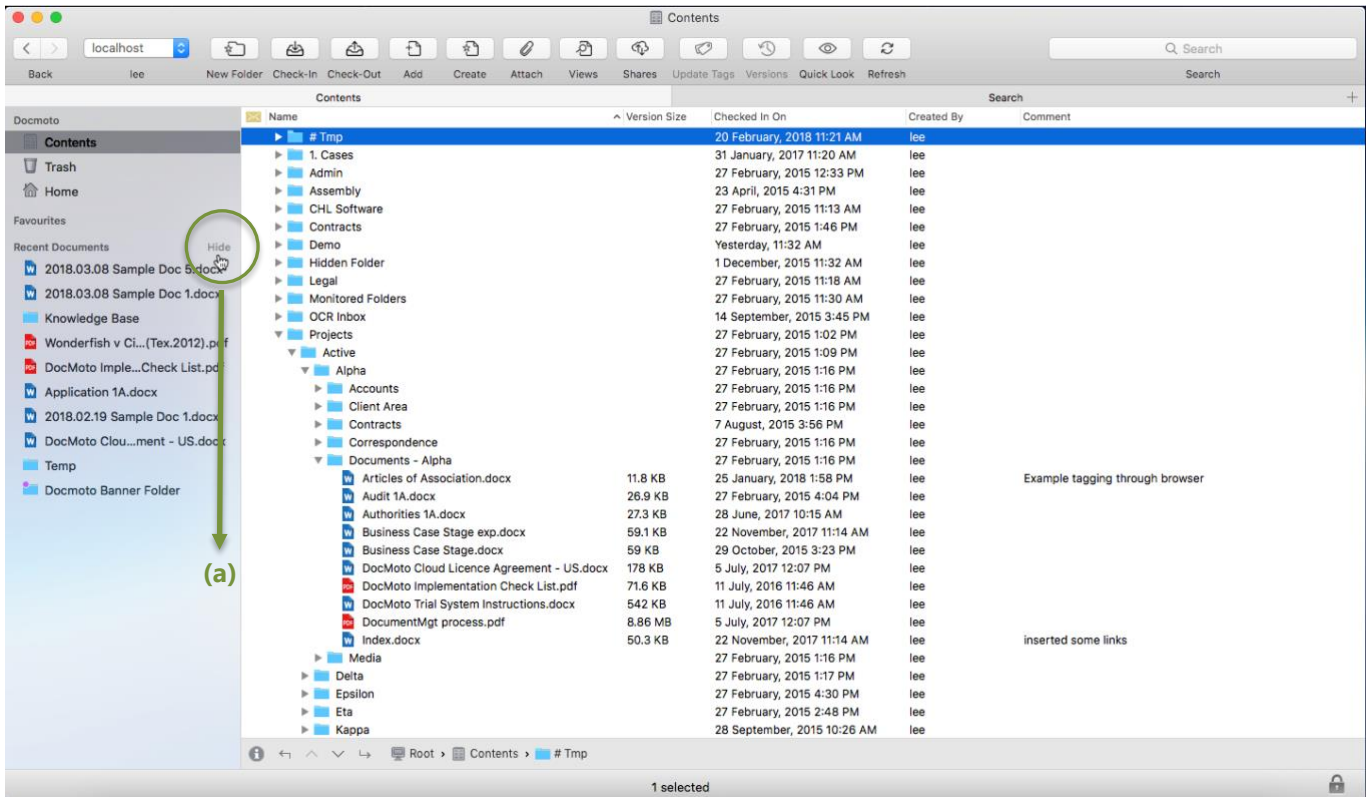
To expose the side panel, reverse the steps listed above.

Fig. Side Panel – Collapsible Sections:

Keeping with the theme of maximizing viewable areas; the sections within the side panel **(1)** DocMoto **(2)** Favourites **(3)** Recent Documents, all have options to **show** or **hide**. To hide a section within the side panel:

1. Place cursor to the right of the section header and a **Hide** or **Show** option will appear, depending on what state the section is currently in. In this example, the **Favourites** section will be hidden.
2. Select the **Hide** option and the listings under the given section will be hidden. See [Fig. Side Panel – Hide Favourites listings.](#)

Fig. Side Panel – Hide Favourites listings:



(a) Hide (& Show) – mouse over control to hide and show section listings.

Tips & Tricks - How To:

This section covers how to interact with the new user interface.

Opening Tabs:

A tab is a graphical control element that allows multiple documents (or folders, panels) to be contained within a single window.

This is especially useful in large document repositories.

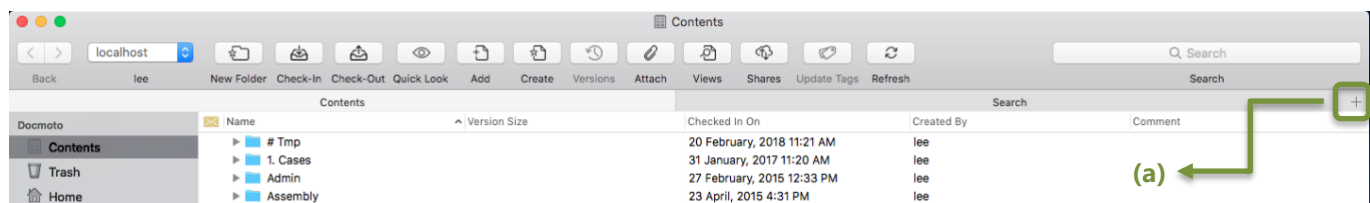
Opening a generic tab:

Method 1:

This method opens a generic tab at the **Contents** level (non specific folder)

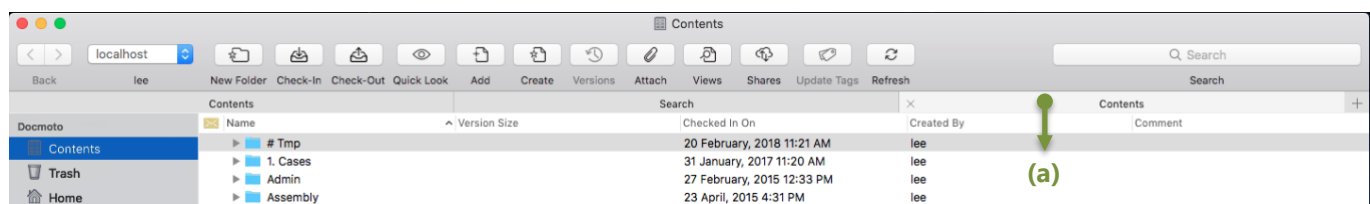
1. Select the + control in the top right-hand side of the user interface (beneath the search interface). As shown in [Fig. Tab Control](#) marked as (a)

Fig. Tab Control



2. A new tab will be opened displaying the contents of the **"Contents"** (shared area). As shown in [Fig. New Tab open - Contents](#) marked as (a)

Fig. New Tab open – Contents



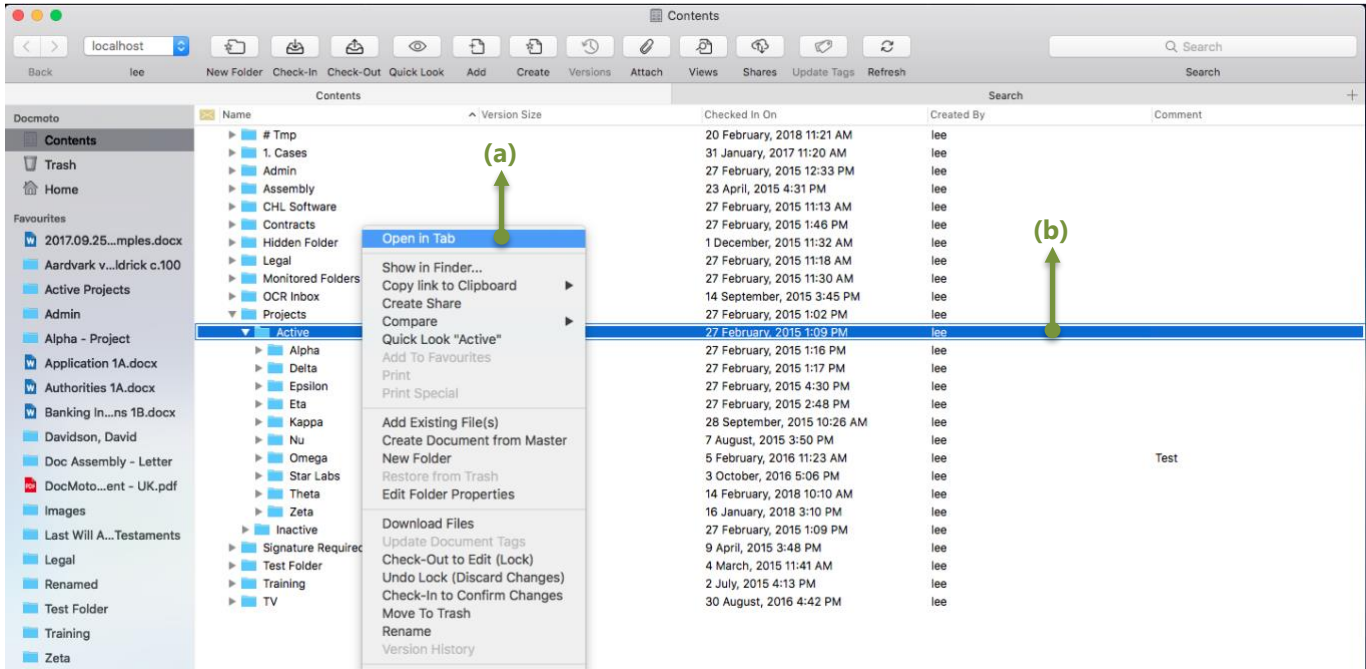
Opening a folder within another tab:

Method 2:

This method opens a tab for a specific folder.

1. Select a folder to open in a new tab.
2. Select the **Open in Tab** option from either:
 - a. The **File** menu
 - b. Right mouse click menu (pop up or action menu)
 - c. The short cut **cmd + t**. As shown in [Fig. Open in Tab – Menu Option](#)

Fig. Open in Tab - Menu Option:

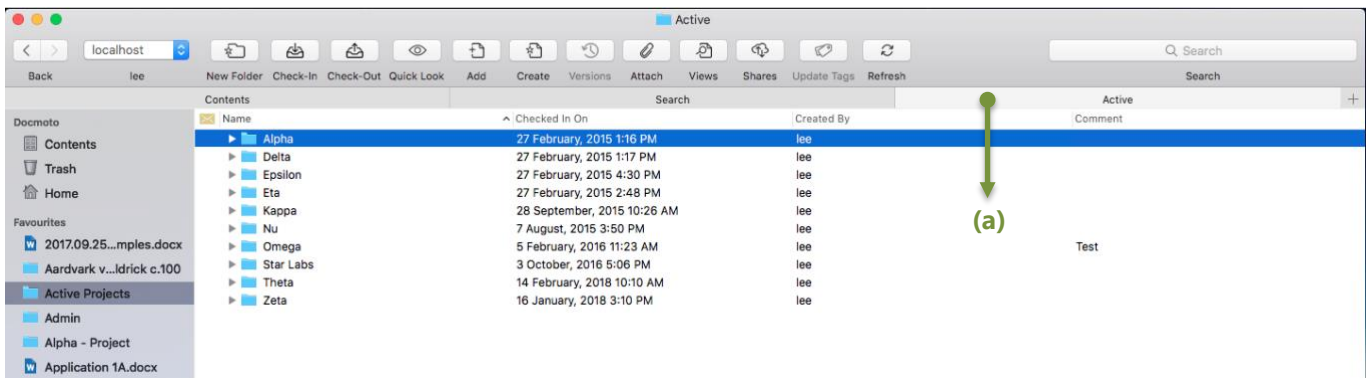


(a) **Open in Tab** – menu option (in this example, the right mouse click menu)

(b) **Active (folder)** – Active project folders to be opened in new tab

3. The Active (project folders) will be opened in a new tab. As shown in [Fig. Active Projects in new tab.](#)

Fig. Active Projects in new tab:



(a) **Active** – Active projects folders opened in new tab.

Note: When tabs are opened they automatically open furthest to the right.

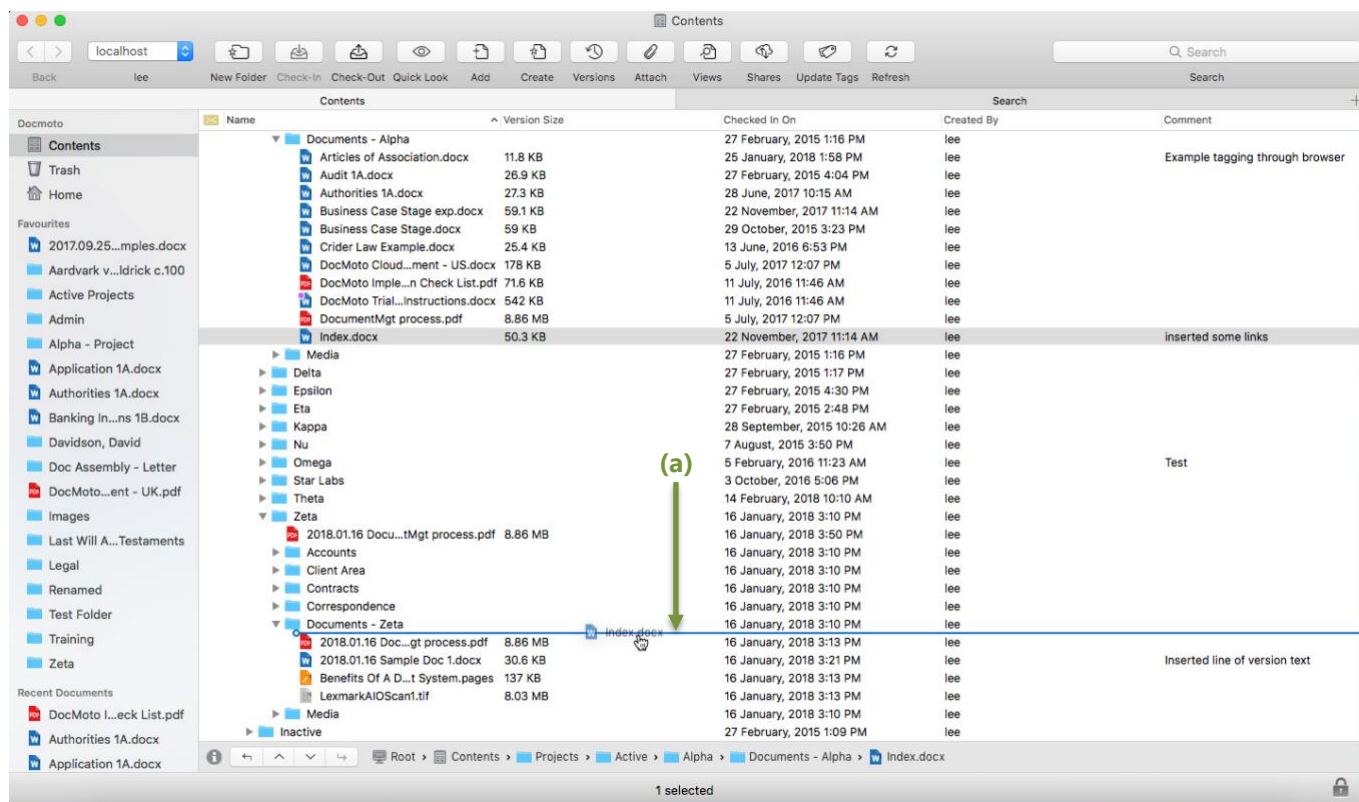
Copying and Moving (folders or files):

Copying and moving folders and files in DocMoto has never been easier, whether copying in the same view or across tabs.

In the Tree View:

1. Navigate to the item(s) to copy or move.
2. Drag the item(s) up or down the tree view (depending on where the item(s) need to be copied). **Tip & Trick:** If a folder is not expanded, dragging the item(s) up or down the tree view and hovering over the folder will expand it, exposing its contents.
3. Drop the item(s) to be copied or moved into the desired folder. **Tip & Trick:** Hover above a folder and it will highlight to illustrate which folder is being updated. Hover underneath a folders hierarchy and a blue bar (with a ring) will appear, illustrating where the item(s) will be copied or moved to. As shown in [Fig. Copy/Move indicator bar](#).

Fig. Copy/Move indicator bar:

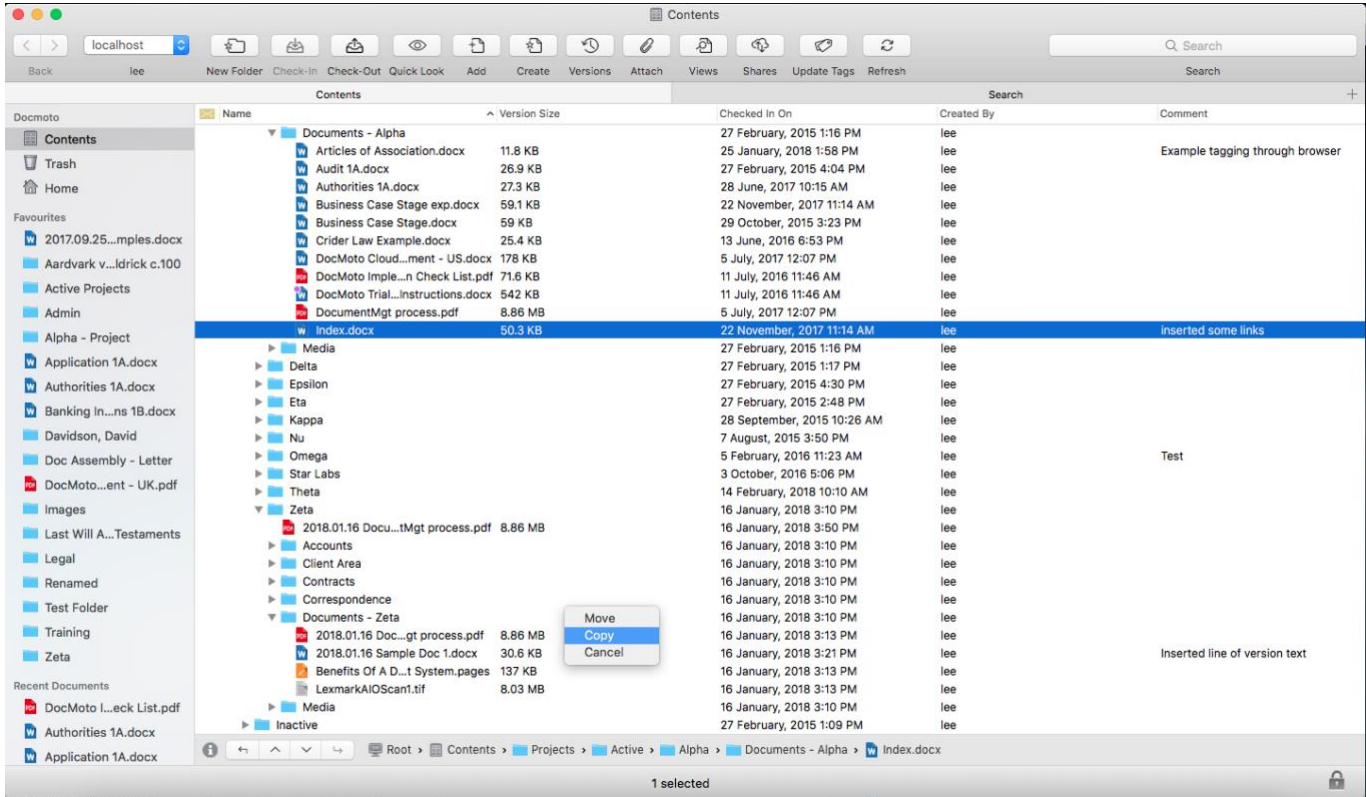


(a) Copy/Move indicator bar – to illustrate where the item(s) will be copied/moved. In this example, the document **Index.docx** is being copied/moved from the **Documents** folder in the **Alpha** project to the **Documents** folder in the **Zeta**.

4. Drop the item(s) to be copied or moved, a pop-up dialog prompts:
 - a. Copy
 - b. Move
 - c. Cancel

As shown in [Fig. Copy, Move, Cancel – dialog](#).

Fig. Copy, Move, Cancel - dialog:



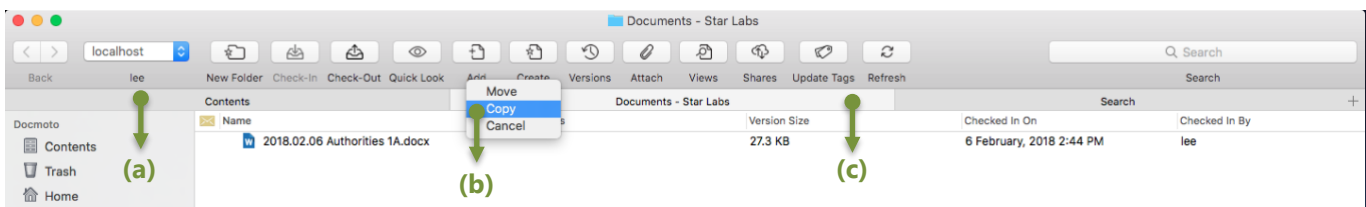
5. Select the appropriate action from the pop-up dialog. In this example, copy.

The document is copied.

Between Tabs:

1. Select the destination folder where the item(s) need to be copied/moved to.
2. Select **Open in Tab** option from either:
 - a. The **File** menu.
 - b. Right mouse click menu (pop up or action menu)
 - c. The short cut **cmd + t**. As shown in [Fig. Open in Tab – Menu Option](#)
3. Select the source folder where the item(s) need to be copied/moved and subsequently select the item(s) to be copied/moved.
4. Drag the item(s) from the source folder tab to the destination tab. A green plus icon will appear on the destination tab. In this example, the document **Audit.docx** is dragged from the **Documents – Alpha** (project folder) tab (source) to the **Documents – Star Labs** (project folder) tab (destination).
5. Drop the item(s) onto the destination tab (**Documents – Star Labs**) in this example. The Copy, Move, Cancel dialog will appear. As shown in [Fig. Copy, Move, Cancel – dialog \(across tabs\)](#).

Fig. Copy, Move, Cancel – dialog (across tabs):



- (a) **Source tab** – item(s) to be copied or moved. In this example, **Documents – Alpha** (project folder).
- (b) **Copy, Move, Cancel dialog** – operations available.
- (c) **Destination tab** – area (folder) where the item(s) will be copied/moved.

6. Select the appropriate action. In this example – copy. The document is copied.

Copy & Move – Supplementary Section:

If a document has more than one version the copy option from the **Copy, Move, Cancel** dialog will have an additional sub menu, offering:

- Current Revision – Only the current revision of the document
- All Revisions – All revisions of the document

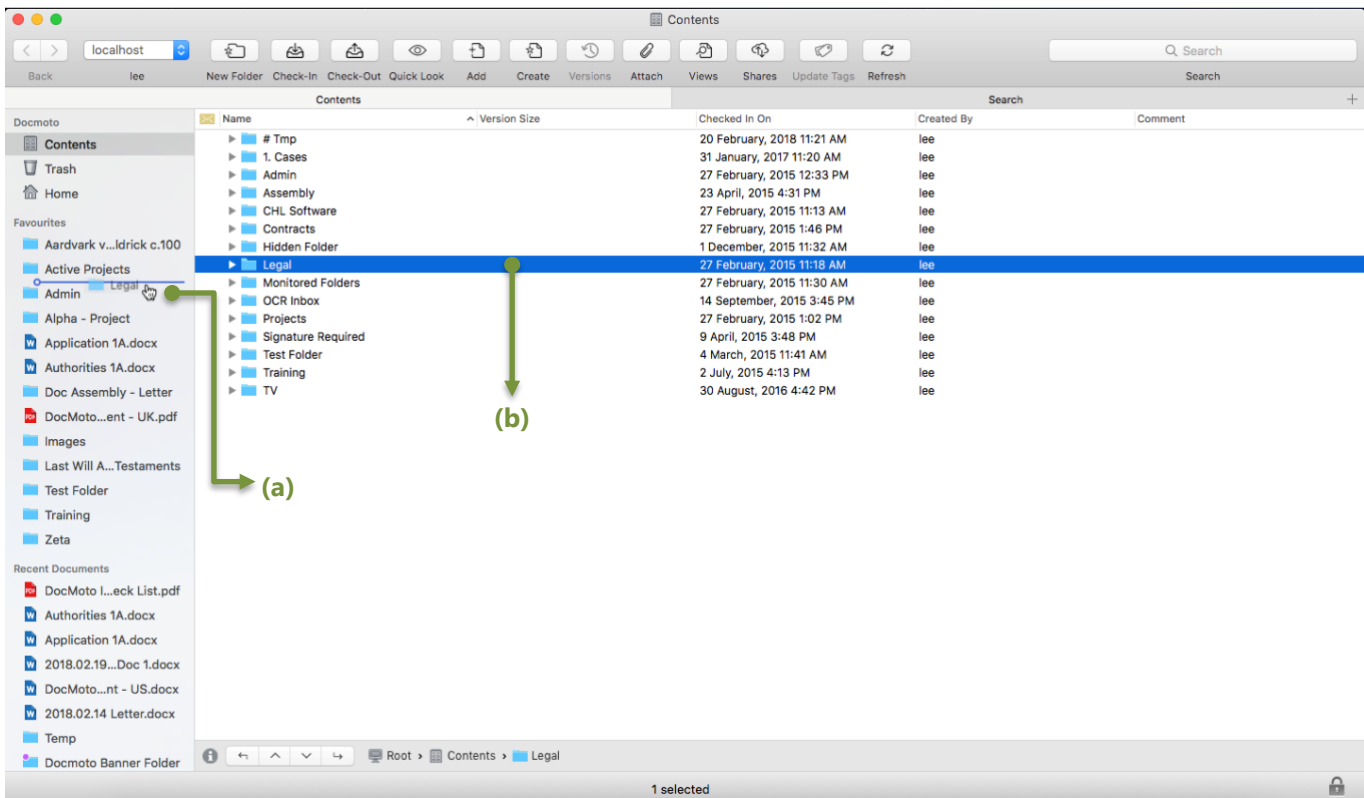
Creating Favourites:

DocMoto users will already be familiar with the ability to create favourites (areas of significant interest) to ensure easy navigation to specific areas within the repository. In the previous version of DocMoto favourites were listed as a drop-down list, now the side panel supports drag & drop of items from anywhere in DocMoto – in keeping with the Finder application. DocMoto still supports the ability to mark items as favourites through the **File** menu and the **Right mouse** click menu.

To create a favourite using drag and drop:

1. Select the item to be marked as a favourite
2. Drag the item from the main tree view to the side panel into the section labelled **Favourites**
3. The Copy/Move indicator bar will appear as the item hovers over the **Favourites** section. Drop the item to make it a favourite. As shown in [Fig. Drag & Drop to Favourites](#)

Fig. Drag & Drop to Favourites:



(a) **Legal (folder)** – dragged to favourites, copy/move indicator to illustrate

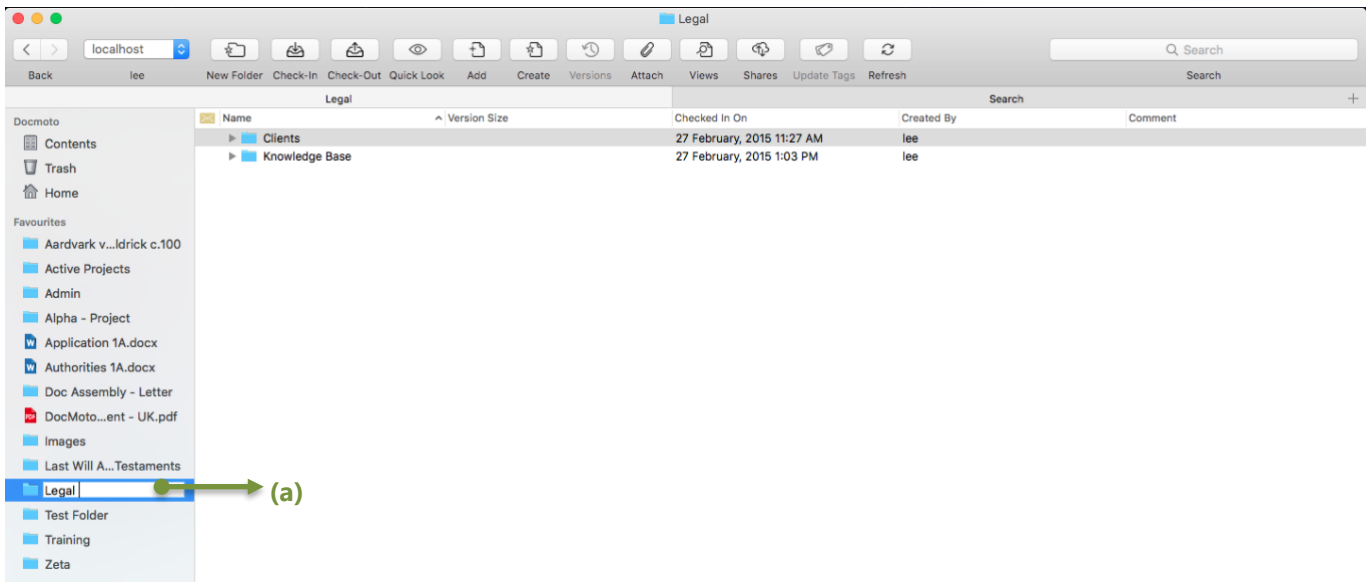
(b) **Legal (folder)** – within repository, situated under the **Contents** level

Note: Any item stored in DocMoto (file or folder) can be marked as a **Favourite**.

Amending a favourites label:

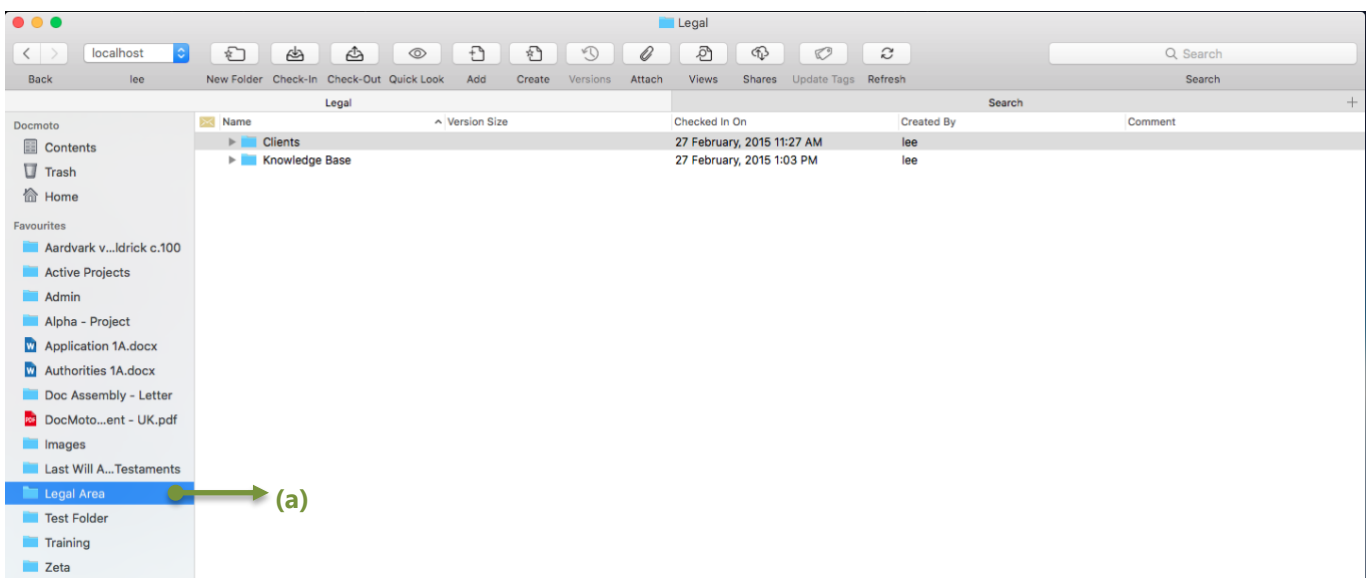
1. Select the favourite to amend
2. Single click on the favourite and an edit box will appear. See [Fig. Amending Favourite](#).
3. Type the new label and select the return key to confirm (or click elsewhere in DocMoto). In this example, the label has been changed from **Legal** to **Legal Area**. See [Fig. Amended Favourite](#).

Fig. Amending Favourite:



(a) Editable Favourite Label

Fig. Amended Favourite:



(a) Favourite Label Amended

Removing a favourite:

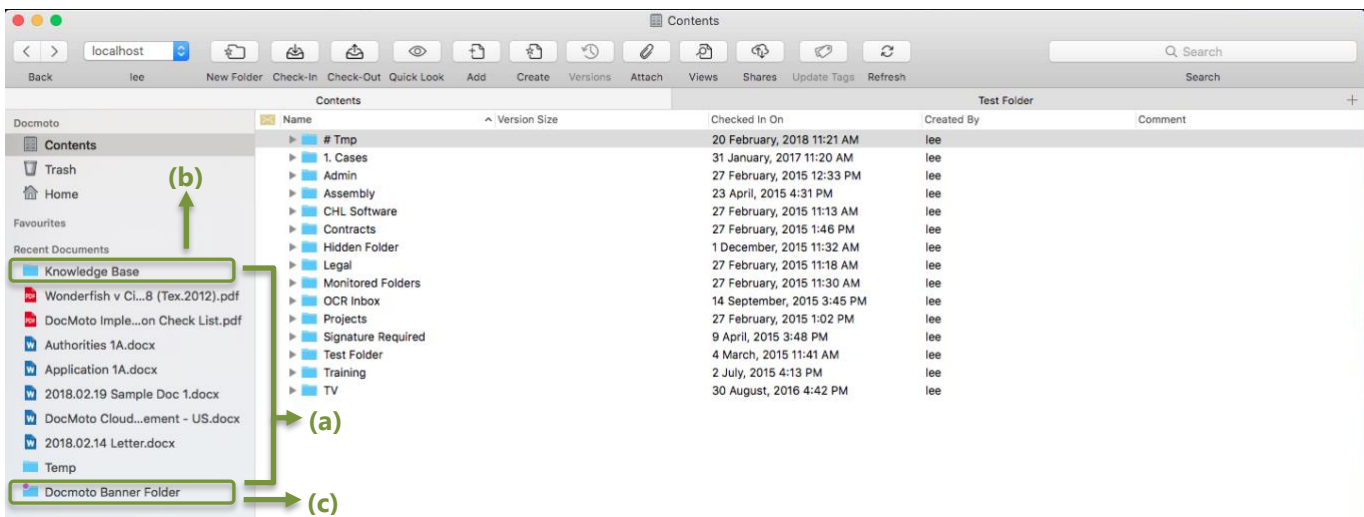
1. Select the favourite to remove
2. Select the delete key

The favourite will be removed from the favourites list.

Recent Documents:

An intelligent list of all the recent documents (potentially folders) worked on. Items within the **Recent Documents** section are listed – most recent first, least recent last. See [Fig. Recent Documents](#).

Fig. Recent Documents:



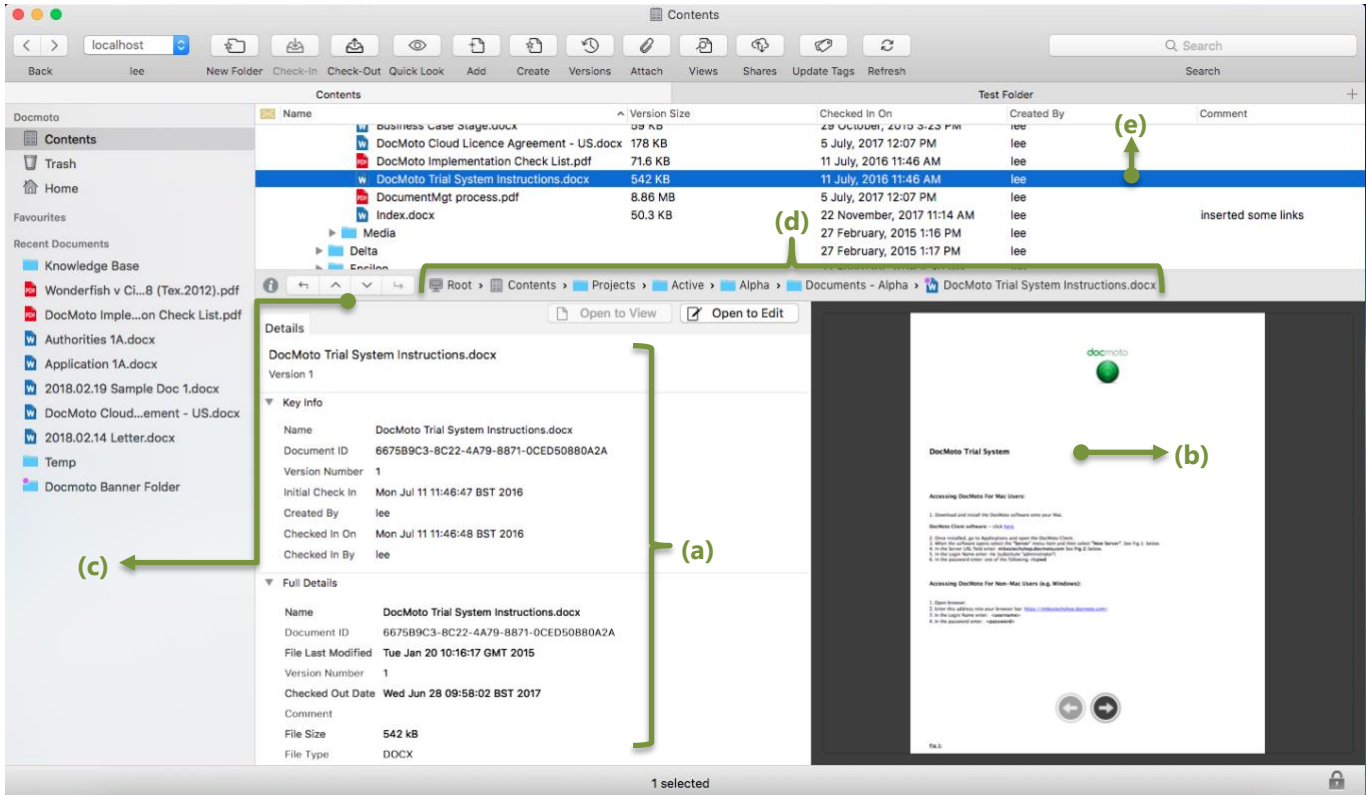
- (a) **Recent Documents** – full listing of all the recent documents (potentially folders) worked on
- (b) **Most Recent** – the most recent item worked on
- (c) **Least Recent** – the least recent item worked on

Info Pane:

Slide controlled split pane view illustrating:

- **Details** – audit information about the item selected
- **Preview** – document or folder preview
- **Document Walker** – intelligent controls to “walk” through documents within large folders when the Info Pane is fully extended (giving the end user a restricted view of the folders contents)
- **Breadcrumb Trail** – intelligent control illustrating location in DocMoto with useful built-in navigational controls

Fig. Info Pane:



- (a) Details
- (b) Preview
- (c) Document Walker
- (d) Breadcrumb Trail
- (e) Active Document

Info Pane – Details:

The screenshot displays the Docmoto interface with a file list on the left, a details pane in the center, and a document preview on the right. The details pane is divided into 'Key Info' and 'Full Details' sections. Green arrows and labels (a) through (e) highlight specific elements:

- (a) Points to the 'Open to View' and 'Open to Edit' buttons at the top of the details pane.
- (b) Points to the document name 'DocMoto Trial System Instructions.docx'.
- (c) Points to the version number 'Version 1'.
- (d) Points to the 'Key Info' section, which includes fields for Name, Document ID, Version Number, Initial Check In, Created By, Checked In On, and Checked In By.
- (e) Points to the 'Full Details' section, which includes fields for Name, Document ID, File Last Modified, Version Number, Checked Out Date, Comment, File Size, and File Type.

(a) Document Operations:

- **Open to View** – Open the document in its native format in Read Only mode
- **Open to Edit** – Open the document in its native format in Read & Write mode

(b) Document Name – Name of the document selected

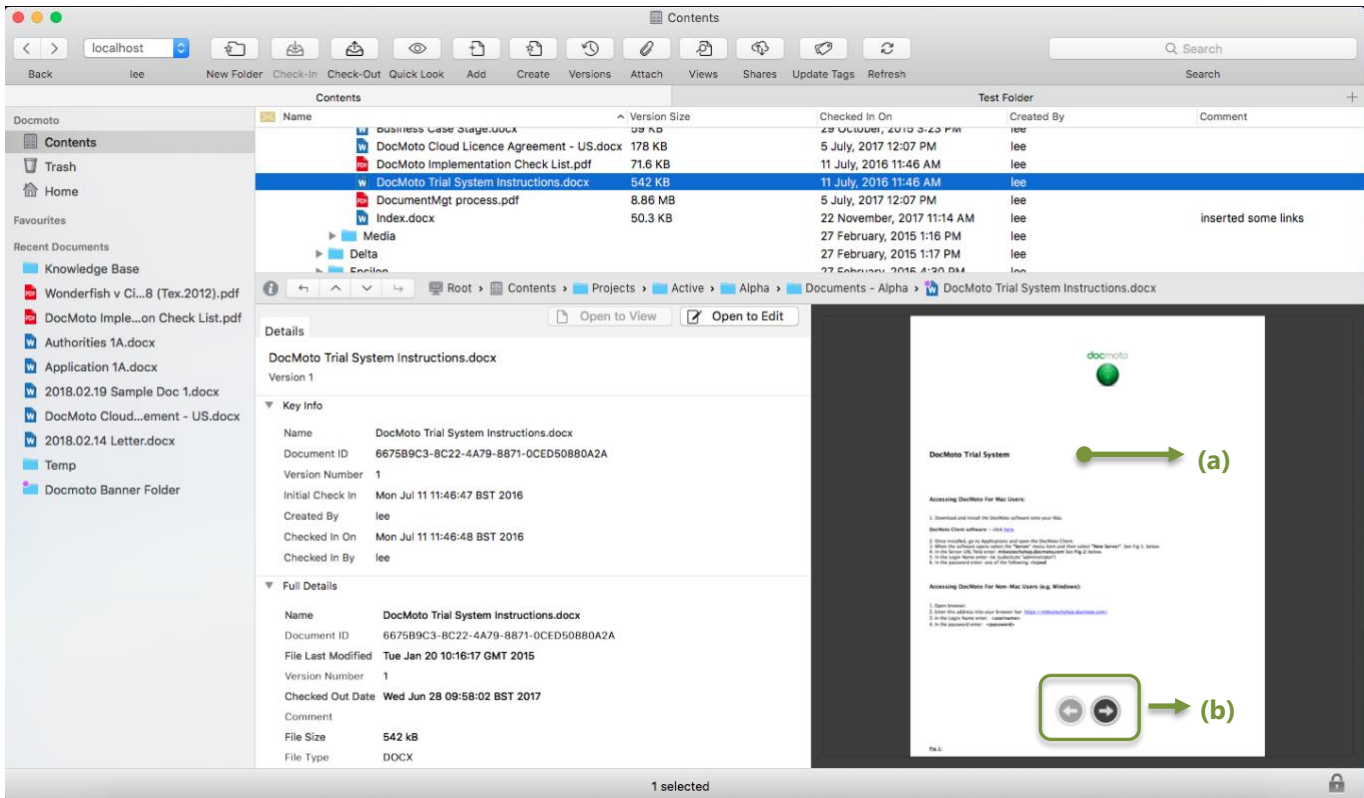
(c) Current Version – The current version of the document selected. In this example, version 1

(d) Key Info – Key information about the item in question, namely:

- **Name** – Name of the document selected
- **Document ID** – Every document in DocMoto is assigned a unique document id
- **Initial Check In** – When was the document checked-in for the first time
- **Created By** – Who created the document
- **Checked In On** – When was the last revision checked-in
- **Checked In By** – Who was the last user to revision the document

(e) Full Details – All other meta-data associated to the document. Whether its meta-data extracted from the document (created by the host application) or DocMoto specific meta-data

Info Pane – Preview:

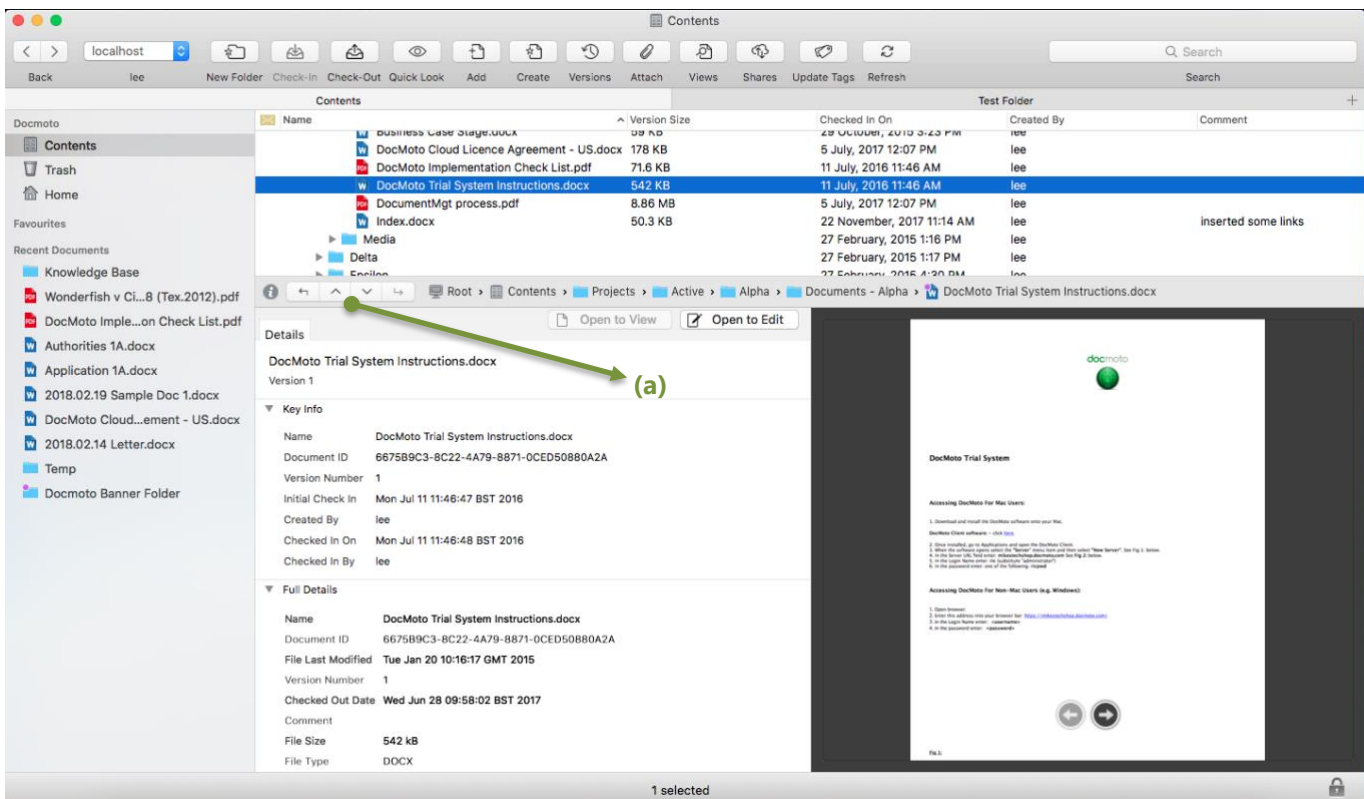


(a) Preview – Document preview. If a folder is selected, the folders' details are listed – specifically:

- Name
- Size
- Last Modified

(b) Navigational Aid - Forward and backward navigation aid for multipage documents

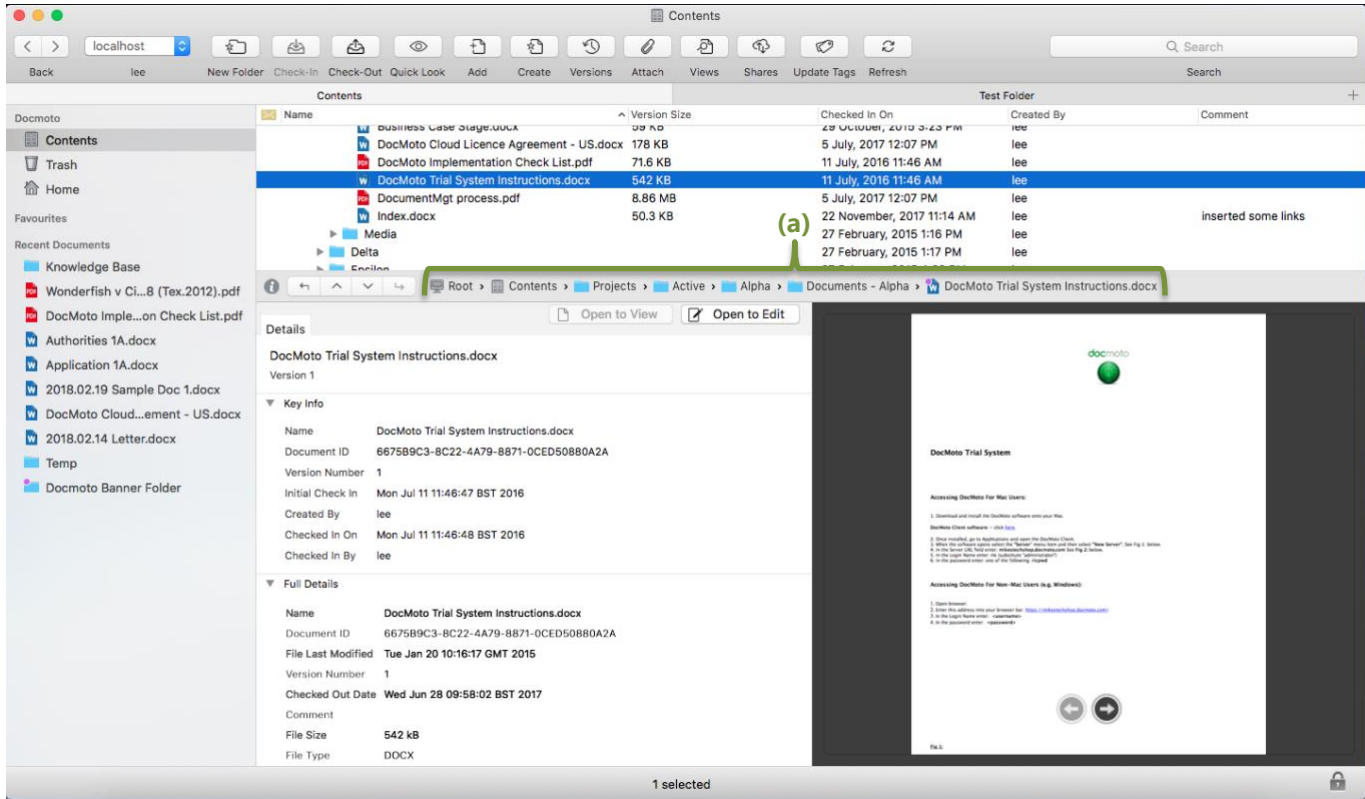
Info Pane – Document Walker:



(a) Document Walker - intelligent controls to “walk” through documents within large folders when the Info Pane is fully extended (giving the end user a restricted view of the folders contents). The controls are as follows:

- Up – Navigate up through the document list
- Down – Navigate down through the document list
- In – Navigate into a folder
- Out – Navigate out of a folder

Info Pane – Breadcrumb trail:



- **(a) Breadcrumb Trail** - intelligent control illustrating location in DocMoto with useful built-in navigational controls. This control is especially useful with the info pane fully extended and a limited view.

Toolbar:

DocMoto has an updated toolbar in terms of:

- Favourites has been removed (and put on the side panel)
- Update Tags has been added
- Fully customizable - add or remove buttons and place buttons in order of preference

Fig. Toolbar



To customize the toolbar:

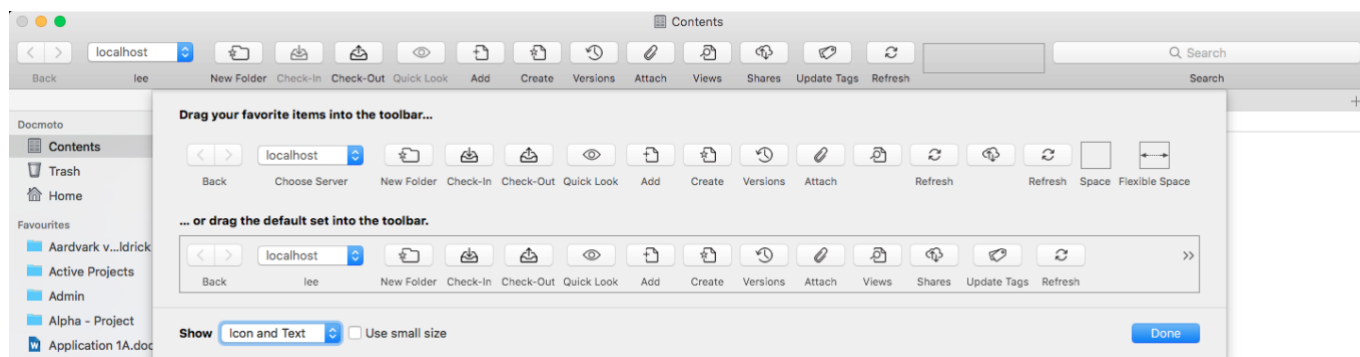
1. Right mouse click on the toolbar and a pop-up menu will appear giving the following options:
 - a. Icon and Text
 - b. Icon Only
 - c. Customize Toolbar...
2. Select the **Customize Toolbar** option. See [Fig. Customize Toolbar](#).

Fig. Customize Toolbar:



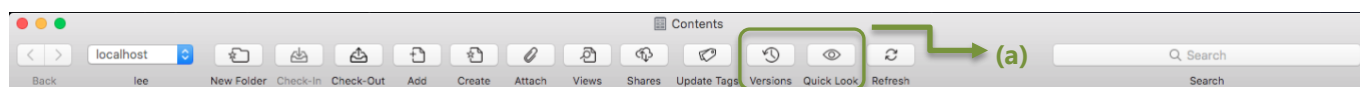
3. To customize the toolbar, open the dialog the following options will be shown:
 - a. Drag toolbar items in order of preference. This must be done on the toolbar itself and not the customize toolbar dialog.
 - b. Remove toolbar items. This must be done on the toolbar itself by dragging items off the toolbar.
 - c. Add toolbar items. This must be done on the customize toolbar dialog by dragging items off the first section onto the toolbar.

Fig. Customize Toolbar Dialog:



[Fig. Customized Toolbar](#) illustrates a customized toolbar

Fig. Customized Toolbar:



(a) **Versions & Quick Look** buttons moved from original positions. Refer to [Fig. Toolbar](#).

Update Tags:

Update Tags function now available through the toolbar.

Tag Ordering:

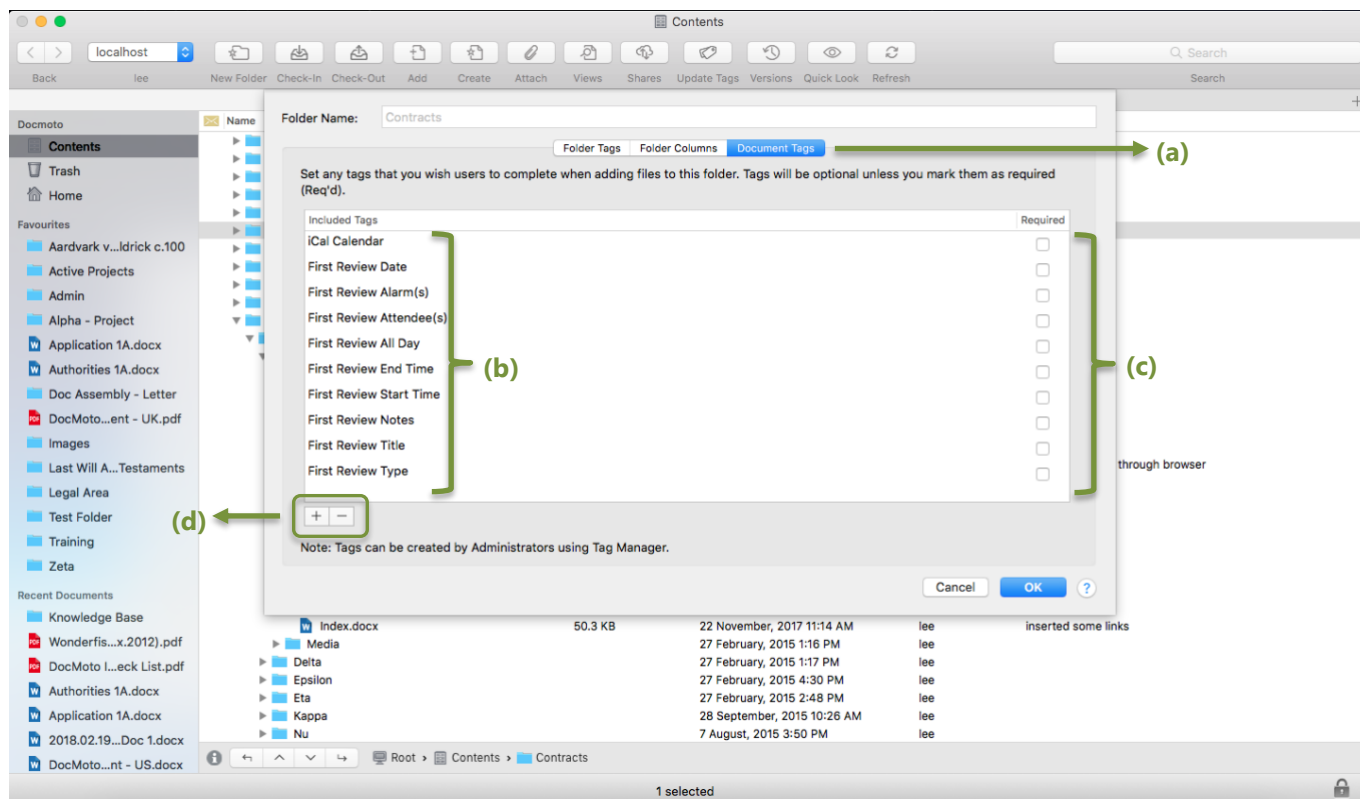
In previous versions of DocMoto tags whether folder or document based are listed alphabetically. DocMoto V3.8 included document assembly or automation and subsequently tag ordering became more important as users need to order tags in order of preference and not alphabetically.

This functionality is now available either manually (i.e. setting tags against an existing folder) or can be set within Folder Templates so the creation and assignment is automatic.

Setting Tag Order – against an existing folder:

1. Select the folder to adjust the properties
2. Select the **“Edit Folder Properties”** from either:
 - a. The **File** menu
 - b. The right mouse click menu (pop-up or action menu)
 - c. The short-cut **cmd + shift + e**
3. A dialog is presented to add/remove/adjust:
 - a. Folder Tags
 - b. Folder Columns
 - c. Document Tag
4. In this example we will adjust the document tags on the folder **Contracts**. Select the **Document Tags** tab.
5. The **Contracts** folder has 10 document tags as shown in [Fig. Contracts Folder – Document Tags](#).

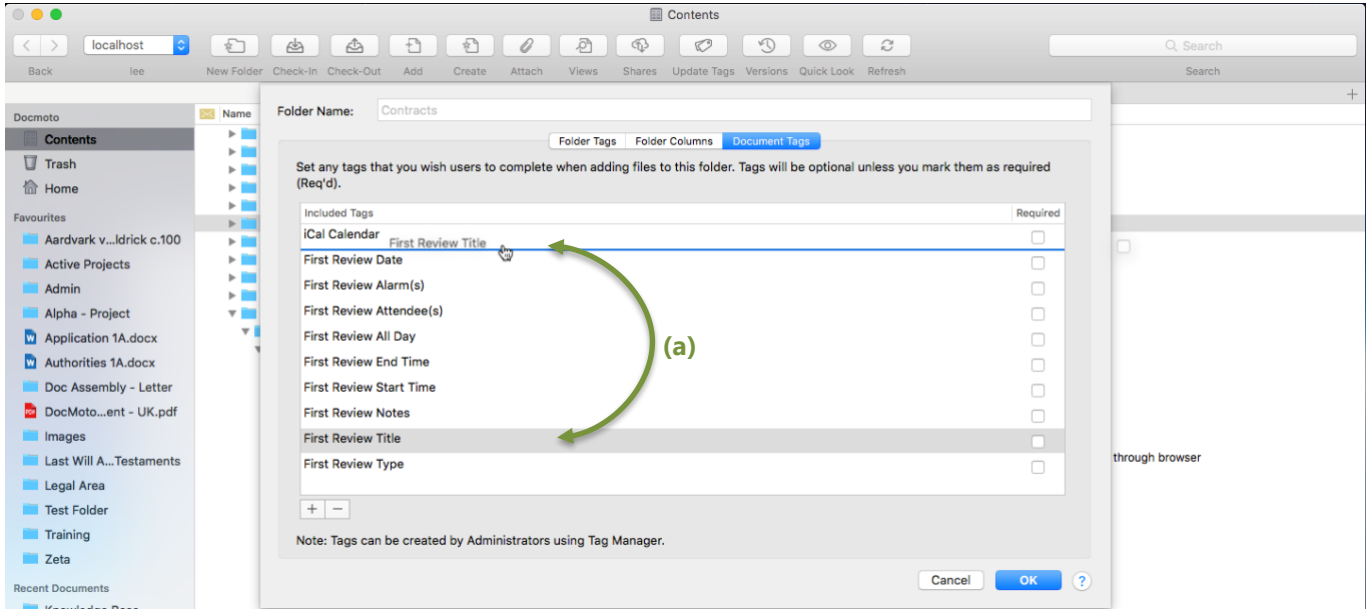
Fig. Contracts Folder – Document Tags:



- (a) **Document Tags** – Tab to enable users to add/remove/adjust document tags
- (b) **Registered Tags** – Tags registered
- (c) **Mandatory or Optional?** – Set **Required** for mandatory adherence to rule or non-checked for optional
- (d) **Add or Remove** – Buttons to add or remove tags

6. Select and drag tags in order of preference. See [Fig. Contracts Folder – Reordering Tags](#).

Fig. Contract Folder – Reordering Tags:

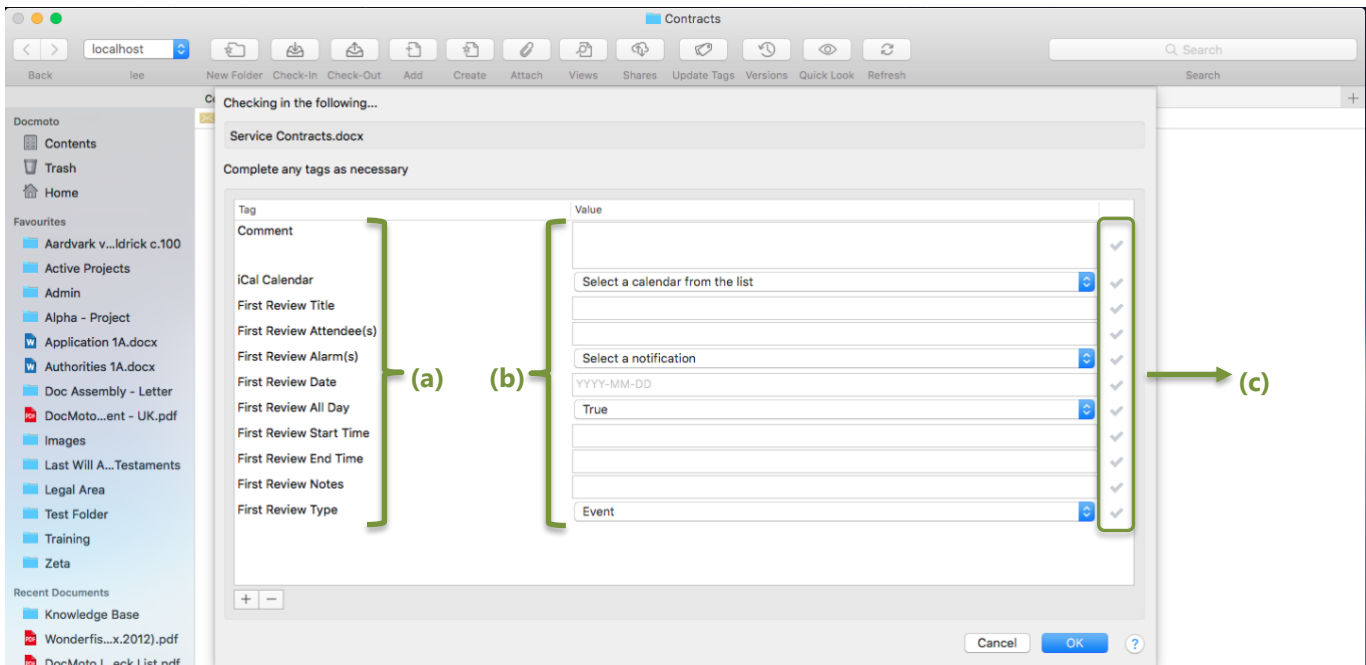


(a) The (document) tag **First Review Title** is dragged from the second to last item to the second item. A useful blue drag indicator is placed on the dialog to indicate the position of the drop.

7. Once tag reordering is complete, select the **OK** button to confirm

Any user importing or creating a document within the **Contracts** folder will now be presented with a new document tag order. See [Fig. Contracts Folder – Reordered Tags](#).

Fig. Contracts Folder – Reordered Tags:



(a) **Tag** – name of tag

(b) **Value** – values assigned to tag

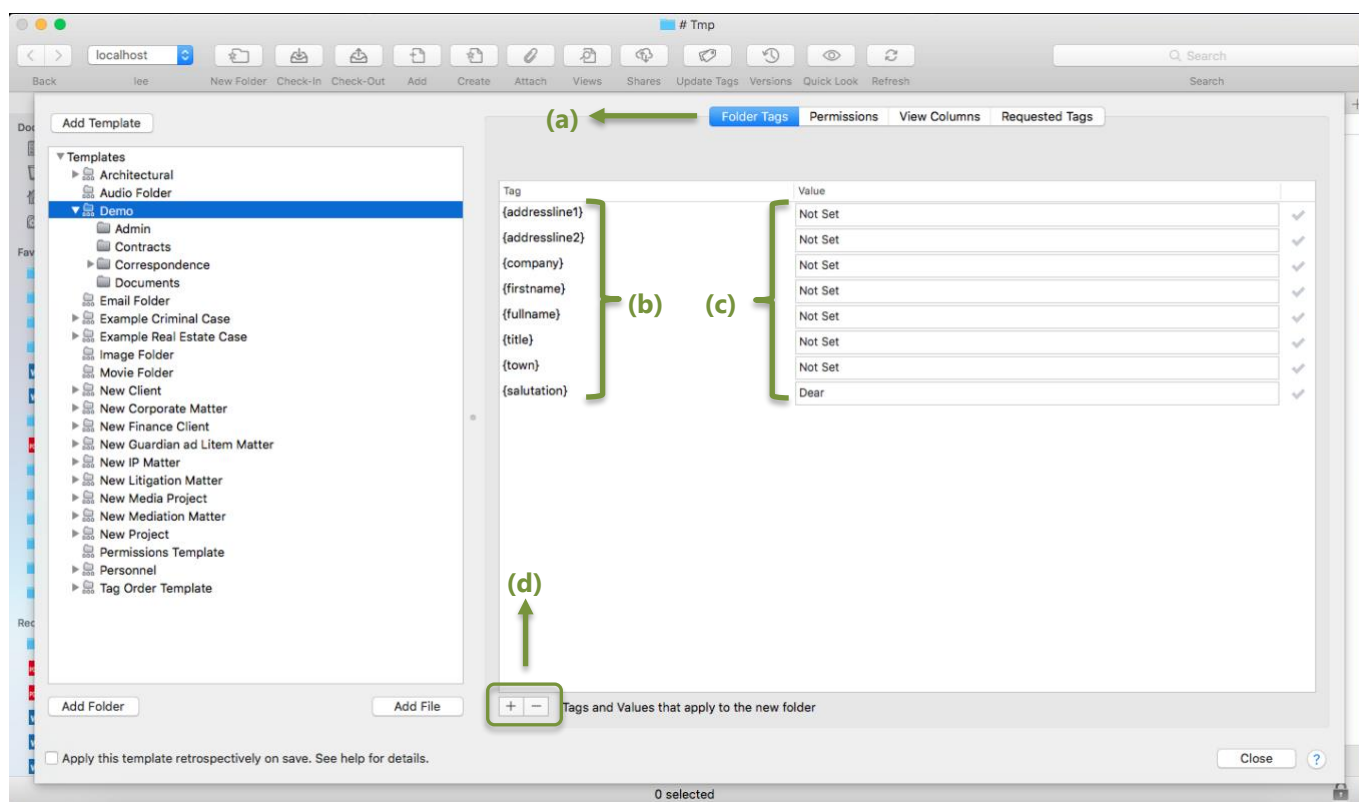
(c) **Optional** – The ✓ icon signifies no values need to be set (setting tags is optional). Hence the **OK** button is enabled. If the tags were mandatory, the icon is set to ! and the **OK** button is disabled until values have been set.

Setting Tag Order – Template Manager:

Note: The **Template Manager** is only available to administrators.

1. Select the **Template Manager** from the **Admin** menu
2. Navigate to the folder template requiring adjustment. In this example, the folder template – **Demo**
3. Select the appropriate tags tab (Folder or Requested). In this example, the **Folder Tags** tab. See [Fig. Demo Folder Template – Folder Tags](#)

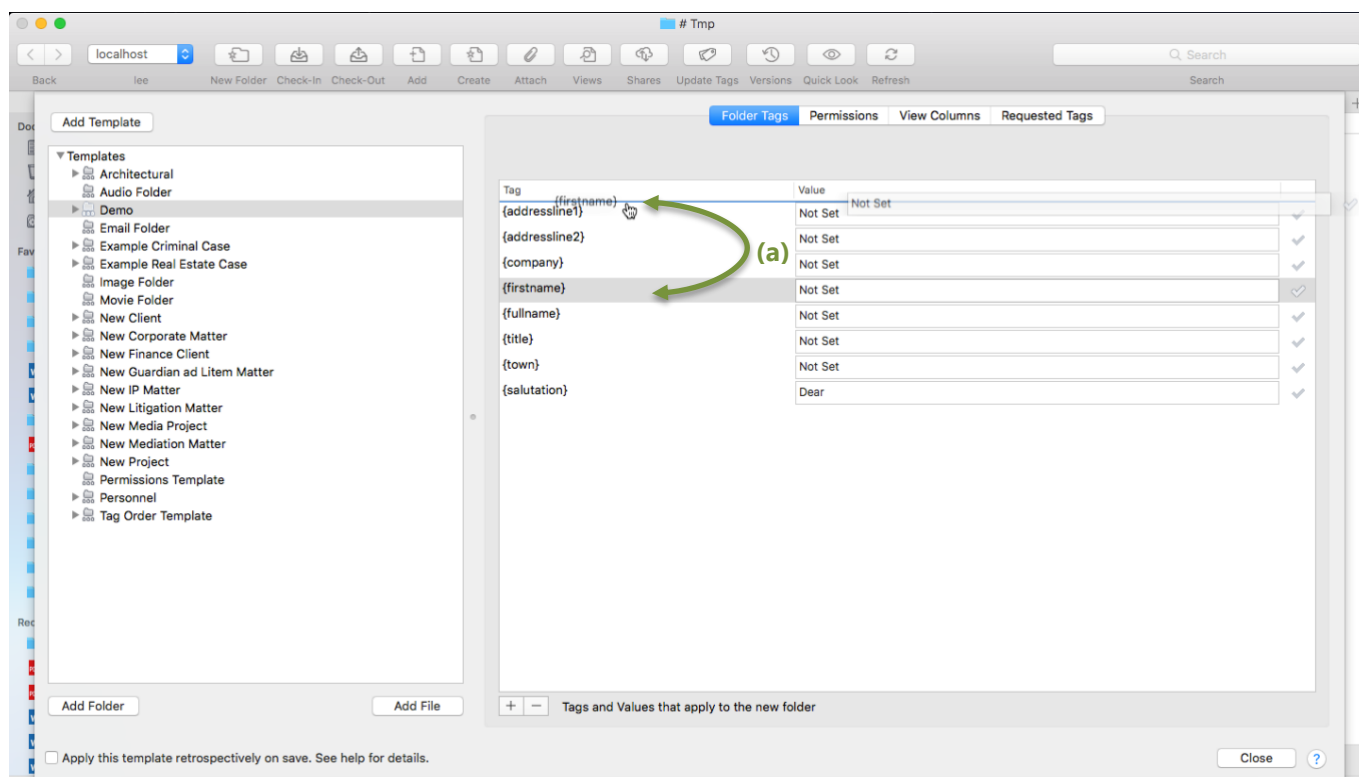
Fig. Demo Folder Template – Folder Tags:



- (a) **Folder Tags (tab)** – Select to add/remove/adjust folder tags associated to the folder selected within the folder template. In this example – the parent folder
- (b) **Registered Tags** – Tags registered
- (c) **Tag Values** – Default values set against folder tags. When the folder template **Demo** is run, the folder tags and default values will be automatically set
- (d) **Add or Remove** – Buttons to add or remove tags

4. Select and drag tags in order of preference. See [Fig. Demo Folder Template – Reordering Tags](#).

Fig. Demo Folder Template – Reordering Tags:



(a) The (folder) tag **{firstname}** is dragged from the fourth item listed to the first item. A useful blue drag indicator is placed on the dialog to indicate the position of the drop.

5. Once tag reordering is complete, select the **Close** button to confirm
6. Select **“Yes”** to save the changes.

The folder tags associated to the parent folder will be created in the order defined by the folder template – **Demo**. This is especially useful when dealing with document assembly as details can be completed in a logical order (i.e. not alphabetized).

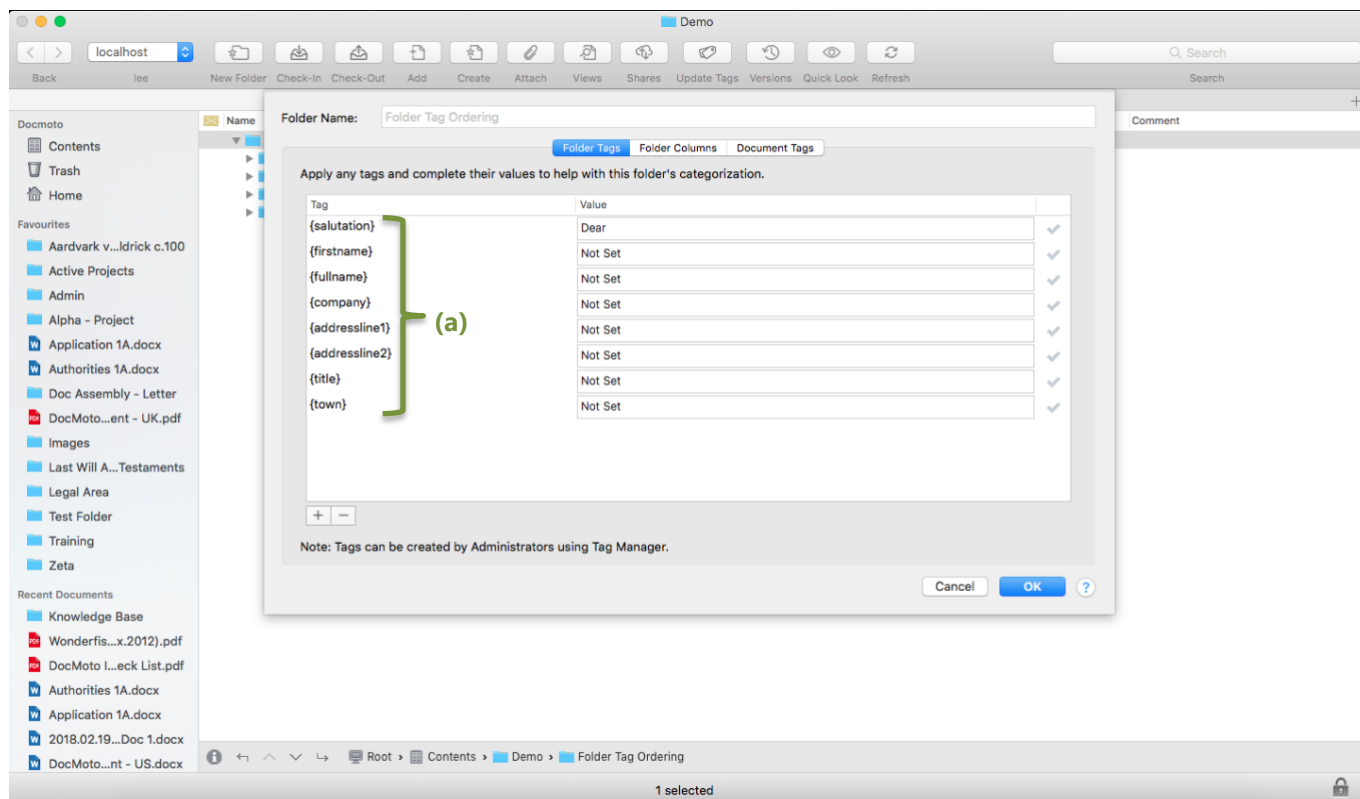
[Fig. Folder Tags Reordered](#) below illustrates a folder structure created via the folder template – **Demo**.

The user has selected the **“Edit Folder Properties”** from either:

- The **File** menu.
- The right mouse click menu (pop-up or action menu).
- The short cut – **cmd + shift + e**

The folder tags assigned to the parent folder (**Folder Tag Ordering**) have been reordered in accordance with the changes made. Of course, the tag ordering will be preserved so that each time the folder template is used the tag ordering will be correct.

Fig. Folder Tags Reordered:



(a) Folder Tags - listed in order defined by the folder template – **Demo**

Secure Share Notifications:

DocMoto supports secure sharing with third parties. Third parties are not registered DocMoto users therefore can be defined as anonymous, bar the email address used to send the share details. We have had requests to support notifications when secure shares are:

1. Accessed
2. Documents uploaded
3. Documents updated

DocMoto V4 includes a server side setting that enables administrators to set up secure share notifications. These settings include:

1. Scheduling:
 - a. How frequent does the service run? For example:
 - i. Every day including weekends
 - ii. Every day excluding weekends
 - iii. Work days only (Monday to Friday)
 - iv. Between certain hours (i.e. 09:00 – 17:00) on some days (week days) and other hours for weekends
 - v. How frequent the service checks the shares – every minute, 15, 30, etc.

There is no user interface for this functionality administrators must be familiar with:

1. The **Terminal** application
2. **Crontab** – a file which contains the schedule of cron entries to be run and at specified times. File location varies by operating systems

Perquisites:

1. The **Email Server Configuration** must have valid SMTP settings
2. Any user creating a share must have a valid email address registered against their user profile

Caveats:

Users receiving share notifications will be informed of:

1. **Date** – when the action occurred
2. **Share** – name of the share
3. **Action** – what took place
4. **Location** – where the action took place
5. **Recipient** – the email address of the recipient (of the share details)

DocMoto can only assume the recipient was the person who logged into the share and subsequently carried out transactions. If multiple recipients were included on a share only the first email address used would be listed in the notification.

Please contact [CHL Software](#) if you would like to know more.

Hardening:

Admin controls to inhibit user download levels and number of unsuccessful logins.

DocMoto V4 includes a server side setting that enables administrators to set up user download levels and number of unsuccessful logins. These settings include:

1. **Number of failed logins** – when set users will be locked out of the system if their login fails more than x number of times (where x = number).
2. **Set download limits** – when set users will not be able to download more than the allocated limit. Administrators can set the following:
 - a. Defaults - per day, per week, per month
 - b. Keys – these enable administrators to create keys for different download configurations, such as:
 - i. Normal – a download profile for standard users
 - ii. Full – a download profile for heavy (or frequent) users

There is no user interface for this functionality administrators must be familiar with:

1. The **Terminal** application.

The DocMoto login dialog has been updated so users can view which of the download options has been applied to their profile.

Please contact [CHL Software](http://www.docmoto.com) if you would like to know more.