

DocMoto

Version 4 - What's New?

CHL Software www.docmoto.com

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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:**

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-			Assembly				21 Septembe	er 2016 16:52	administrator			
			CHL Software				26 Septembe	er 2016 15:35	administrator			
			Contracts				26 Septembe	er 2016 15:55	administrator			
			Legal				21 Septembe	er 2016 14:06	administrator			
			Monitored Folders				9 February 2	017 16:54	lee		•	
			News letters				2 August 201	17 10:14	lee			
			Projects				23 Septembe	er 2016 14:26	administrator		(c)	
			Test Folder				30 May 2017	15:18	lee			
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(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:

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Contents Search Search	+
Docmoto 🔀 Name ^ Version Size Checked In On Create By Comment	
Contents Fill # Tmp 20 February, 2018 11:21 AM lee	
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🔜 Last Will And Testaments 🔯 Business Case Stage exp.docx 59.1 KB 22 November, 2017 11:14 AM lee	
Business Case Stage.docx 59 KB 29 October, 2015 3:23 PM lee	
Crider Law Example.docx 25.4 KB 13 June, 2016 6:53 PM lee	
DocMoto Cloud Licence Agreement - US.docx 178 KB 5 July, 2017 12:07 PM lee	
Test Folder DocMoto Implementation Check List.pdf 71.6 KB 11 July, 2016 11:46 AM	
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🖻 DocMoto Cloudent - US.docx 🕒 🔄 🗠 🗢 🤟 🖳 Root > 🔤 Contents > 🗮 # Tmp	
1 selected	6

(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:

# ݱ

2. Slide the side panel to the left until it's hidden. See Fig. Side Panel Hidden.

### Fig. Side Panel Hidden:

•••			Contents		
$\langle \rangle$	localhost ᅌ 🐑 💩 💩	1 1 0		$\odot$	Q Search
Back	lee New Folder Check-In Check-Out	Add Create Atta	ch Views Shares Update Tags	Versions Quick Look Refresh	Search
	Contents				Search +
Name		<ul> <li>Version Size</li> </ul>	Checked In On	Created By	Comment
▶ 🖿	# Tmp		20 February, 2018 11:21 AM	lee	
▶ ■	1. Cases		31 January, 2017 11:20 AM	lee	
- F 💼	Admin		27 February, 2015 12:33 PM	lee	
▶ 🖿	Assembly		23 April, 2015 4:31 PM	lee	
> > 🖿	CHL Software		27 February, 2015 11:13 AM	lee	
▶ 💼	Contracts		27 February, 2015 1:46 PM	lee	
▶ ■	Demo		Yesterday, 11:32 AM	lee	
	Hidden Folder		1 December, 2015 11:32 AM	lee	
	Legal		27 February, 2015 11:18 AM	lee	
	Monitored Folders		27 February, 2015 11:30 AM	lee	
	Dick Indox		27 Eebruary 2015 1:02 PM	lee	
	Projects		27 February, 2015 1:02 PM	lee	
	Alpha		27 February, 2015 1:09 PM	lee	
			27 February, 2015 1:16 PM	lee	
	Client Area		27 February, 2015 1:16 PM	lee	
	Contracts		7 August, 2015 3:56 PM	lee	
	Correspondence		27 February, 2015 1:16 PM	lee	
	Documents - Alpha		27 February, 2015 1:16 PM	lee	
	Articles of Association.docx	11.8 KB	25 January, 2018 1:58 PM	lee	Example tagging through browser
	W Audit 1A.docx	26.9 KB	27 February, 2015 4:04 PM	lee	
	Authorities 1A.docx	27.3 KB	28 June, 2017 10:15 AM	lee	
	Business Case Stage exp.docx	59.1 KB	22 November, 2017 11:14 AM	lee	
	Business Case Stage.docx	59 KB	29 October, 2015 3:23 PM	lee	
	DocMoto Cloud Licence Agreement - US.docx	178 KB	5 July, 2017 12:07 PM	lee	
	DocMoto Implementation Check List.pdf	71.6 KB	11 July, 2016 11:46 AM	lee	
	DocMoto Trial System Instructions.docx	542 KB	11 July, 2016 11:46 AM	lee	
	DocumentMgt process.pdf	8.86 MB	5 July, 2017 12:07 PM	lee	
	M Index.docx	50.3 KB	22 November, 2017 11:14 AM	lee	inserted some links
	Media		27 February, 2015 1:16 PM	lee	
	Delta		27 February, 2015 1:17 PM	lee	
	Epsilon		27 February, 2015 4:30 PM	lee	
			27 February, 2015 2:48 PM	iee	
0.			20 September, 2015 10:26 AN	1 166	
0 4	∧ ∨ → ₩ ROOT > B CONTENTS > # Tmp				
			1 selected		
-					

**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 <u>Fig. Side Panel Hide</u> <u>Favourites listings</u>.



#### 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 <u>Fig. Tab Control</u> marked as (a)

#### Fig. Tab Control

•••			Contents		
< > localhost	1 & A		A 4	8	Q Search
Back lee	New Folder Check-In Check-Out	t Quick Look Add Create Versions Attack	Views Shares Update Tags R	lefresh	Search
	Contents			Search	+
Docmoto	Name	▲ Version Size	Checked In On	Created By	Comment
Contents	▶ 🚞 # Tmp		20 February, 2018 11:21 AM	lee	
Trash	1. Cases		31 January, 2017 11:20 AM	lee	(a)
Home	► Admin ► Assembly		27 February, 2015 12:33 PM 23 April, 2015 4:31 PM	lee	(a)

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

### Fig. New Tab open – Contents

•••		💷 C	ontents			
< > localhost 😋 🐔	E & & @	Ð 🕙 🖉	2 4 0 2		Q Search	
Back lee New F	Folder Check-In Check-Out Quick Look	Add Create Versions Attach	Views Shares Update Tags Refres	h	Search	
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Contents	▶ 🚞 # Tmp		20 February, 2018 11:21 AM	lee 🔻		
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1 Home ►	Assembly		23 April, 2015 4:31 PM	lee		

#### **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:

			🗐 C	ontents			
< > localhost 📀	1 4 4	0 1 1	30	2 4 0	2		Q Search
Back lee	New Folder Check-In Check-O	ut Quick Look Add Create	/ersions Attach	Views Shares Update Tag	gs Refresh		Search
	Contents					Search	+
Docmoto	🔀 Name	<ul> <li>Version Size</li> </ul>		Checked In On		Created By	Comment
Contents	🕨 📰 # Tmp			20 February, 2018 11:21 AM	м	lee	
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llome.	Accembly	▲		27 February, 2015 12:33 P	<sup>M</sup>	lee	
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Favourites	Contracts		_	27 February, 2015 1:46 PM	И	lee	(b)
2017.09.25mples.docx	Hidden Folder	Open in Tab		1 December, 2015 11:32 At	M	lee	
Aardvark vldrick c.100	Legal	Show in Finder		27 February, 2015 11:18 AM	м	lee	1
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Admin	Projects	Create Share	-	27 February, 2015 1:02 PM	A	lee	
Alpha - Project	🔻 🖿 Active	Compare  Quick Look "Active"		27 February, 2015 1:09 PM	Λ	lee	
	Alpha	Add To Favourites		27 February, 2015 1:16 PM	1	lee	-
Application 1A.docx	Delta	Print		27 February, 2015 1:17 PM	1	lee	
Mathorities 1A.docx	Epsilon	Print Special		27 February, 2015 4:30 PM	M	lee	
Banking Inns 1B.docx	k Kanna	Add Existing File(s)		28 September 2015 10:26	SAM	lee	
Davidson, David	▶ ■ Nu	Create Document from Master		7 August, 2015 3:50 PM		lee	
Doc Assembly - Letter	🕨 🚞 Omega	New Folder		5 February, 2016 11:23 AM	4	lee	Test
DocMotoent - UK.pdf	Star Labs	Restore from Trash		3 October, 2016 5:06 PM		lee	
- Images	Theta	Edit Folder Properties		14 February, 2018 10:10 At	м	lee	
images	E Inactive	Download Files		27 Eebruary, 2018 3:10 PM	4	lee	
Last Will ATestaments	Signature Requirec	Update Document Tags		9 April, 2015 3:48 PM		lee	
Legal	Test Folder	Check-Out to Edit (Lock)		4 March, 2015 11:41 AM		lee	
Renamed	Training	Undo Lock (Discard Changes)		2 July, 2015 4:13 PM		lee	
Test Folder	► TV	Move To Trash		30 August, 2016 4:42 PM		lee	
Training		Rename					
🔲 Zeta		Version History					

- (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:

• •		Active		
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Back lee	New Folder Check-In Check-Out Quick Look	Add Create Versions Attach Views Share	Update Tags Refresh	Search
	Contents	Search		Active +
Docmoto	Name	▲ Checked In On	Created By	Comment
Contents	🕨 🖿 Alpha	27 February, 2015 1:16 PM	lee	
Trash	Delta	27 February, 2015 1:17 PM	lee	
	Epsilon	27 February, 2015 4:30 PM	lee	
1 Home	🕨 🔜 Eta	27 February, 2015 2:48 PM	lee	
Favourites	🕨 🔜 Kappa	28 September, 2015 10:26 AM	lee (a)	
	▶ Nu	7 August, 2015 3:50 PM	lee	
2017.09.25mpies.docx	Omega	5 February, 2016 11:23 AM	lee	Test
Aardvark vldrick c.100	Star Labs	3 October, 2016 5:06 PM	lee	
Active Projects	Theta	14 February, 2018 10:10 AM	lee	
- Habita i Taja ata	Zeta	16 January, 2018 3:10 PM	lee	
Admin				
Alpha - Project				
Application 1A.docx				

(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 <u>Fig. Copy/Move indicator</u> <u>bar</u>.

• •										Contents							
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Back	lee	New Folder	Check-In	Check-Out	Quick Look	Add	Create	Versions	Attach	Views	Shares	Update Tag	gs R	etresh		Search	
				Contents											Search		+
Docmoto		Name					Version Size	e		(	Checked In C	In			Created By	Comment	
Con	tents		7 Do	ocuments - A	lipha						27 February	2015 1:16	PM		lee	Construction products	
Tras	b		<u></u>	Articles of A	ssociation.do	OCX	11.8 KB				25 January,	2018 1:58 P	PM		lee	Example tagging throug	h browser
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Favourites				Business Ca	se Stage dor	CV CV	50 KR				22 November	2015 3.23	DM		lee		
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				DocMoto Cl	oudment - I	US.docx	178 KB				5 July 2017	12:07 PM			lee		
Aaro	dvark vldrick c.100	2		DocMoto Im	plen Check	List.pdf	71.6 KB				11 July, 2016	5 11:46 AM			lee		
Acti	ve Projects		10	DocMoto Tri	alInstructio	ons.docx	542 KB				11 July, 2016	5 11:46 AM			lee		
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Doc	Assembly - Letter	Þ	Ome	ga					- (	a) 🕛	5 February,	2016 11:23	AM		lee	Test	
Doc	Moto ent - UK ndf	•	Star	Labs							3 October, 2	2016 5:06 PI	M		lee		
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Train	ning		-	2018.01.16	Docgt proce	ess.pdf	8.86 MB	W Ind	exclocx		16 January,	2018 3:13 P	M		lee		
Zota				2018.01.16 5	Sample Doc 1	.docx	30.6 KB				16 January,	2018 3:21 P	M		lee	Inserted line of version	text
2010				Benefits Of	A Dt System	m.pages	137 KB				16 January,	2018 3:13 P	M		lee		
Recent Doo	cuments			LexmarkAIO	Scan1.tif		8.03 MB				16 January,	2018 3:13 P	M		lee		
Doc	Moto Ieck List.pd	f.	▶ 📄 Me	edia							16 January,	2018 3:10 P	M		lee		
Auth	norities 1A.docx		Inactive	•							27 February	2015 1:09	PM		lee		
🖸 Арр	lication 1A.docx	0 5	~ ×	-> -	Root > 📰	Content	s 🔹 💼 Proje	ects 🤉 🚞 A	ctive 🔸	Alpha >	Docum	ents - Alpha	a > 🖸	Index.d	ocx		
									1 s	elected							

## 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:

• • •		Co	ontents		
< > localhost 🗢	1 4 4 0 1 1	90	2 4 6 2		Q Search
Back lee	New Folder Check-In Check-Out Quick Look Add Create	Versions Attach	Views Shares Update Tags Refresh		Search
	Contents			Search	+
Docmoto	🔀 Name 🔷 Version Size		Checked In On	Created By	Comment
Contents	🔻 🚞 Documents - Alpha		27 February, 2015 1:16 PM	lee	
	Articles of Association.docx 11.8 KB		25 January, 2018 1:58 PM	lee	Example tagging through browser
U Trash	Audit 1A.docx 26.9 KB		27 February, 2015 4:04 PM	lee	
🟠 Home	Authorities 1A.docx 27.3 KB		28 June, 2017 10:15 AM	lee	
	Business Case Stage exp.docx 59.1 KB		22 November, 2017 11:14 AM	lee	
Favountes	Business Case Stage.docx 59 KB		29 October, 2015 3:23 PM	lee	
2017.09.25mples.docx	Crider Law Example.docx 25.4 KB		13 June, 2016 6:53 PM	lee	
Aardvark vldrick c.100	DocMoto Cloudment - US.docx 178 KB		5 July, 2017 12:07 PM	lee	
Active Projects	DocMoto Implen Check List.pdf 71.6 KB		11 July, 2016 11:46 AM	lee	
Henve Projects	DocMoto TrialInstructions.docx 542 KB		11 July, 2016 11:46 AM	lee	
Admin	DocumentMgt process.pdf 8.86 MB		5 July, 2017 12:07 PM	lee	
Alpha - Project	W Index.docx 50.3 KB		22 November, 2017 11:14 AM	lee	inserted some links
Application 1A docx	Media		27 February, 2015 1:16 PM	lee	
	▶ Deita		27 February, 2015 1:17 PM	lee	
Authorities 1A.docx	P Epsilon		27 February, 2015 4:30 PM	lee	
👿 Banking Inns 1B.docx	Eta		27 February, 2015 2.48 PM	lee	
Davidson, David			7 August 2015 3:50 PM	lee	
	D Omena		5 February 2016 11:23 AM	100	Test
Doc Assembly - Letter	Star Labs		3 October, 2016 5:06 PM	lee	1001
DocMotoent - UK.pdf	▶ Theta		14 February, 2018 10:10 AM	lee	
Images	z Zeta		16 January, 2018 3:10 PM	lee	
	2018.01.16 DocutMat process.pdf 8.86 MB		16 January, 2018 3:50 PM	lee	
Last WIII A lestaments	Accounts		16 January, 2018 3:10 PM	lee	
🚞 Legal	Client Area		16 January, 2018 3:10 PM	lee	
Renamed	Contracts		16 January, 2018 3:10 PM	lee	
Total Falder	Correspondence		16 January, 2018 3:10 PM	lee	
lest Folder	🔻 📃 Documents - Zeta	Move	16 January, 2018 3:10 PM	lee	
Training	2018.01.16 Docgt process.pdf 8.86 MB	Сору	16 January, 2018 3:13 PM	lee	
Zeta	2018.01.16 Sample Doc 1.docx 30.6 KB	Cancel	16 January, 2018 3:21 PM	lee	Inserted line of version text
	Benefits Of A Dt System.pages 137 KB		16 January, 2018 3:13 PM	lee	
Recent Documents	LexmarkAlOScan1.tif 8.03 MB		16 January, 2018 3:13 PM	lee	
DocMoto Ieck List.pdf	🕨 🚞 Media		16 January, 2018 3:10 PM	lee	
Authorities 1A.docx	Inactive		27 February, 2015 1:09 PM	lee	
Application 1A.docx	🚯 🤄 A 🗸 🕞 🖳 Root 🕽 Contents 🐂 Projec	cts > 💼 Active > 💼	Alpha 🔹 📩 Documents - Alpha 🔹 👿 Index	docx	
		1 sel	ected		<b>A</b>
The second second second second					

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.
- 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):

•••					Doci	uments - Star	abs				
	ilhost ᅌ		<b>∆</b>	1	3	2 2	<b>A</b>	0		Q Search	
Back	lee	New Folder Check-In Che	ck-Out Quick Look	Add Create	Versions Atta	ch Views	Shares Upd	ate Tags Refresh		Search	
		Contents		Move	Docum	ents - Star Labs			Search	1	+
Docmoto		Name		Cancel	s		Version Size		Checked In On	Checked In By	
Contents		2018.02.06 Aut	norities 1A.docx	-			27.3 KB	+	6 February, 2018 2:44 PM	lee	
🗍 Trash	(a)							(c)			
🟠 Home				(D)							

- (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 dropdown 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 Area**. See Fig. Amended Favourite.

### Fig. Amending Favourite:

•••							-	Legal						
< > localhost ᅌ	   	4		Ð	*	1	0	ඵ	4		2		Q, 9	Search
Back lee	New Folder Check-I	n Check-Out	Quick Look	Add	Create	Versions	Attach	Views	Shares	Update Tags	Refresh			Search
		Legal										Search		+
Docmoto	Name		^ \	Version Size	9			Checked In	On		С	created By	Comment	
Contents	Clients							27 Februar	ry, 2015 11:	27 AM	le	ee		
Trash	Knowledg	je Base						27 Februar	ry, 2015 1:0	3 PM	IE	ee		
🟠 Home														
Favourites														
Aardvark vldrick c.100														
Active Projects														
Admin														
🔲 Alpha - Project														
Application 1A.docx														
Authorities 1A.docx														
Doc Assembly - Letter														
DocMotoent - UK.pdf														
Images														
🔲 Last Will ATestaments														
Legal 🛛 💭	—— (a)													
Test Folder														
Training														
Zeta														

#### (a) Editable Favourite Label

## Fig. Amended Favourite:

						L a sal						
						Legai						
< > localhost	4		Ð	*	9	ළු	<b>A</b>		2		Q Search	
Back lee	New Folder Check-In	Check-Out Quick	Look Add	Create Ve	rsions Attac	n Views	Shares	Update Tags	Refresh		Search	
		Legal								Search		+
Docmoto	Name		<ul> <li>Version Size</li> </ul>			Checked In	On		Created By		Comment	
Contents	Clients					27 Februa	ry, 2015 11:	27 AM	lee			
😈 Trash	Knowledge	e Base				27 Februa	ry, 2015 1:0	13 PM	lee			
🟠 Home												
Favourites												
Aardvark vldrick c.100												
Active Projects												
Admin												
🔲 Alpha - Project												
Application 1A.docx												
Authorities 1A.docx												
Doc Assembly - Letter												
DocMotoent - UK.pdf												
Images												
Last Will ATestaments												
📄 Legal Area 🛛 🔴	(a)											
Test Folder	()											
Training												
Zeta												

#### (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:**

• • •			Contents			
< > localhost 🗯 🐑	෪ ෪ ◎	000	2 4 0 3		Q. Search	
Back lee New Folde	r Check-In Check-Out Quick Look	Add Create Versions Attach	Views Shares Update Tags Refresh		Search	
	Contents			Test Folder		+
Docmoto	Name	<ul> <li>Version Size</li> </ul>	Checked In On	Created By	Comment	
Contents	🕨 🚞 # Tmp		20 February, 2018 11:21 AM	lee		
TT Touch	1. Cases		31 January, 2017 11:20 AM	lee		
(b)	Admin		27 February, 2015 12:33 PM	lee		
Home	Assembly		23 April, 2015 4:31 PM	lee		
Favouritas	CHL Software		27 February, 2015 11:13 AM	lee		
Pavountes	Contracts		27 February, 2015 1:46 PM	lee		
Recent Documents	Hidden Folder		1 December, 2015 11:32 AM	lee		
Knowledge Base	Elegal		27 February, 2015 11:18 AM	lee		
Wonderfish v Ci. 8 (Tex 2012) pdf	Monitored Folders		27 February, 2015 11:30 AM	lee		
	DCR Inbox		14 September, 2015 3:45 PM	lee		
DocMoto Impleon Check List.pdf	Projects		27 February, 2015 1:02 PM	lee		
Authorities 1A.docx	Tast Folder		4 March 2015 3:48 PM	lee		
Application 1A.docx	Training		2 July, 2015 4:13 PM	lee		
2018.02.19 Sample Doc 1.docx	▶ 🖿 TV		30 August, 2016 4:42 PM	lee		
DocMoto Cloudement - US.docx	→ (a)					
2018.02.14 Letter.docx	()					
Temp						
Docmoto Banner Folder	(c)					

- (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:

• • •	Contents	
< > localhost 😋 🐑		Q. Search
Back lee New Folde	er Check-In Check-Out Quick Look Add Create Versions Attach Views Shares Update Tags Refresh	Search
	Contents	Test Folder +
Docmoto         Image: Contents         Image: Trash         Image: Trash	Contents           Name         Oversion Size         Checked in On           DocMoto Cloud Licence Agreement - U.S.docx         178 KB         5. July, 2017 12:07 PM           DocMoto Cloud Licence Agreement - U.S.docx         178 KB         5. July, 2017 12:07 PM           DocMoto Cloud Ingenentation Check List, 16 KB         11 July, 2016 11:46 AM           DocMoto Trial System Instructions.docx         542 KB         11 July, 2017 12:07 PM           DocMoto Trial System Instructions.docx         542 KB         11 July, 2017 12:07 PM           DocMoto Trial System Instructions.docx         50.3 KB         22 Nowmber, 2017 11:14 AM           DocMoto Trial System Instructions.docx         50.3 KB         22 Nowmber, 2015 1:17 PM           Details         Root > Contents > Projects > Active > Alpha > Documents - Alpha > Document	Test Folder + Created By Comment Reference Ref
	File Size 542 kB	~ ~
	The type DOLA	<b>a</b>

#### (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:

•••	Contents	
< > localhost 😋 🐑		Q. Search
Back lee New Folde	er Check-In Check-Out Quick Look Add Create Versions Attach Views Shares Update Tags Refresh	Search
	Contents	Test Folder +
Docmoto	Name Version Size Checked In On 24 October, 2015 24 October, 2015	Created By Comment
Contents	DocMoto Cloud Licence Agreement - US.docx 178 KB 5 July, 2017 12:07	PM lee
U Trash	DocMoto Implementation Check List.pdf 71.6 KB 11 July, 2016 11:46	SAM lee
Home	DocumentMgt process.pdf 8.86 MB 5 July, 2017 12:07	PM lee
Favourites	Index.docx 50.3 KB 22 November, 201	7 11:14 AM lee inserted some links
Recent Documents	Media 27 February, 2015     Delta 27 February, 2015	1:16 PM lee 1:17 PM lee
Knowledge Base	Encilon 27 Enkrupy 2016	4:20 DM Ion
Wonderfish v Ci8 (Tex.2012).pdf	1 Active > Alpha > Documents - Alpha > Documents - Alpha >	DocMoto Trial System Instructions.docx
DocMoto Impleon Check List.pdf	Details	
Authorities 1A.docx		
Application 1A.docx	DocMoto Trial System Instructions.docx	
2018.02.19 Sample Doc 1.docx		•
DocMoto Cloudement - US.docx	* Key Into	
2018.02.14 Letter.docx	Name DocMoto Trial System Instructions.docx	
Temp	Document ID 66/589C3-8C22-4A79-88/1-0CED50880A2A	DocMoto Trial System (a)
📒 Docmoto Banner Folder	Initial Check In Mon Jul 11 11:46:47 BST 2016	
	Created By lee	1. Deerhaul and install the Decklare anthware write your Wal.
	Checked In On Mon Jul 11 11:46:48 BST 2016	Bechlese Clean suffware - choi loss 2 One smalled pris Agentations and agent the Standard Clean. 3 When the suffware assess starts in the start of their school "New Kenner" for the 1 kins.
	Checked In By lee	A in the lower UK, field enter mikeomstehung denommenen fon Fig 2 Intion. 5 in the Lips Anno enter net Judication Varianzament 6 in the passwerd enter on al discourse (Figured
	▼ Full Details	Accessing DocMoto For Non-Mac Users (e.g. Windows):
	Name DocMoto Trial System Instructions.docx	Open freezet     Open freezet     Open freezet     Open freezet     Open freezet     Open freezet     Open     Open
	Document ID 6675B9C3-8C22-4A79-8871-0CED50880A2A	A, is the password write:password/-
	File Last Modified Tue Jan 20 10:16:17 GMT 2015	
	Version Number 1	
	Checked Out Date Wed Jun 28 09:58:02 BST 2017	(C) (C) (D) (D) (D) (D) (D) (D) (D) (D) (D) (D
	File Size 542 kB	
	File Type DOCX	513
	1 selected	<b>A</b>

(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:

• • •	Contents	
< > localhost 😋 🐑		Q. Search
Back lee New Folde	er Check-In Check-Out Quick Look Add Create Versions Attach Views Shares Update Tags Refresh	Search
	Contents	Test Folder +
Docmoto	Name   Version Size  Checked In On	Created By Comment
Contents	DocMoto Cloud Licence Agreement - US.docx 178 KB 5 July, 2017 12:0	J7 PM lee
Trash	DocMoto Implementation Check List.pdf 71.6 KB 11 July, 2016 11:4	46 AM lee
倚 Home	w DocMoto Trial System Instructions.docx 542 KB 11 July, 2016 11:4	46 AM lee
	DocumentMgt process.pdf 8.86 MB 5 July, 2017 12:0	J7 PM lee inserted some links
Favourites	Media 22 February 201	15 1:16 PM lee
Recent Documents	Delta 27 February, 201	I5 1:17 PM lee
Knowledge Base	Encilon 27 Enkrunn: 201	
Wonderfish v Ci8 (Tex.2012).pdf	Contents > Projects > Active > Alpha > Documents - Alpha	DocMoto Trial System Instructions.docx
DocMoto Impleon Check List.pdf	Details	
Authorities 1A.docx	Details	
Application 1A.docx	DocMoto Trial System Instructions.docx	docmoto
2018.02.19 Sample Doc 1.docx	Version 1 (a)	
DocMoto Cloudement - US.docx	▼ Key Info	
2018 02 14 Letter docx	Name DocMoto Trial System Instructions.docx	
	Document ID 6675B9C3-8C22-4A79-8871-0CED50880A2A	DocMoto Trial System
Temp	Version Number 1	
Docmoto Banner Folder	Initial Check In Mon Jul 11 11:46:47 BST 2016	Accessing Doctripte For Mac Users
	Created By lee	1. Diseñad ard instal fe Godian erhenn ente pur Nac. Restin Gran aleman - et al an
	Checked in On Mon Jul 11 11:46:48 BST 2016	2 Once insulted, as its Applitudient and specifie DevNets Clevel. 3 When the advance specification for "Memory" entry tank and their select "New Nerver", See Fig 1, believe
	Checked in By lee	<ol> <li>In the Logics Name enter the Sublicities "advectories" (in the Annual Sublicities (in the Annual Sublimet Sublicities (in the Annual Sublicitie</li></ol>
	▼ Full Details	Accessing Docktore For Non-Mac Users (e.g. Windows)
	Name DocMoto Trial System Instructions docx	1. Open fremaner. 2. Enter the address the adures the figure (molecularlying Ascentes com)
	Document ID 667589C3-8C22-4A79-8871-0CED50880A2A	A in the parameter of the commenter
	File Last Modified Tue Jan 20 10:16:17 GMT 2015	
	Version Number 1	
	Checked Out Date Wed Jun 28 09:58:02 BST 2017	
	Comment	
	File Size 542 kB	Ni
	File Type DOCX	
	1 selected	A

(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

• • •											Contents				
$\langle \rangle$	localhost	0	1	da	4		Ð	1	C	0	ළු	\$	Ø	2	Q, Search
Back	lee		New Folder	Check-In	Check-Out	Quick Look	Add	Create	Versions	Attach	Views	Shares	Update Tags	Refresh	Search

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:

• • •											Contents				✓ Icon and Text	
$\langle \rangle$	localhost	0	1	da I	⊉		Ð		3	0	ඵ	\$	Ø	2	Icon Only	Q. Search
Back	lee		New Folder	Check-In	Check-Out	Quick Look	Add	Create	Versions	Attach	Views	Shares	Update Tags	Refresh	Customize Toolbar	Search

- 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:

0 😐 🖷	Contents	
< > localhost		
Back lee	New Folder Check-In Check-Out Quick Look Add Create Versions Attach Views Shares Update Tags Refresh	
Docmoto	Drag your favorite items into the toolbar	+
Contents Contents Trash Home	Iocalhost       Image: Choose Server       New Folder       Check-In       Check-Out       Quick Look       Add       Create       Versions       Attach       Refresh       Refresh       Space       Fiexible Space	
Favourites	or drag the default set into the toolbar.	
Aardvark vldrick Active Projects Admin	Iocalhost       Image: Construction of the con	
<ul> <li>Alpha - Project</li> <li>Application 1A.doc</li> </ul>	Show Icon and Text 🗘 🗆 Use small size Done	

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:**

3.

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
  - 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:

0 0 0	Contents	
< > localhost 🗘		
Back lee	New Folder Check-In Check-Out Add Create Attach Views Shares Update Tags Versions Quick Look Refresh	Search
		+
Docmoto	Name Folder Name: Contracts	
Contents	Folder Tags Folder Columns Document Tags	(a)
Trash	Set any taos that you wish users to complete when adding files to this folder. Taos will be optional unless you mark them as required	(a)
🟠 Home	▶ (Req'd).	
Favouritae	Included Tags     Required	
Aardvark v. Idrick c 100	iCal Calendar	
Active Projects	First Review Date	
	First Review Alarm(s)	
Admin	= Eist Paview Attendes(s)	
Alpha - Project		
Application 1A.docx	This review All Day	
M Authorities 1A.docx	First Review End Time (D)	(C)
Doc Assembly - Letter	First Review Start Time	
DocMotoent - UK.pdf	First Review Notes	
Images	First Review Title	
Last Will ATestaments	First Review Type	through browser
🔲 Legal Area		
Test Folder		
Training	Note: Tags can be created by Administrators using Tag Manager.	
Zeta		
Recent Documents	Cancel OK ?	
Knowledge Base		
Wonderfisx.2012).pdf	Index.docx 50.3 KB 22 November, 2017 11:14 AM lee inserted som	ie links
DocMoto Lueck List.pdf	Delta     27 February, 2015 1:17 PM lee	
Authorities 14 docy	▶ Epsilon 27 February, 2015 4:30 PM lee	
	▶ Eta 27 February, 2015 2:48 PM lee	
	▶ Nu 7 August, 2015 10-20 AW lee	
DesMate at U0 dam	G ← ∧ ∨ → ■ Root → ■ Contents → Contracts	
DocMotont - US.docx		0
	1 selected	(ii)

- (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:

0 🗧 🌒	Contents	
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Back lee New Folde	er Check-In Check-Out Add Create Attach Views Shares Update Tags Versions Quick Look Refresh	Search
Docmoto Si Name	Folder Name: Contracts Folder Tags Folder Columns Document Tags Set any tags that you wish users to complete when adding files to this folder. Tags will be optional unless you mark them as required (Reord).	+
a Pointe Favourites Favourites Active Projects Admin Alpha - Project Admin Alpha - Project Admin Alpha - Project Doc Assembly - Letter Doc Assembly - Letter DocMotoent - UK.pdf Images Last Will ATestaments Legal Area Test Folder Training Zeta	Included Tags ICal Calendar First Review Title First Review Alarm(s) First Review Alarm(s) First Review Alarm(s) First Review Alarm(s) First Review Chal Time First Review Start Time First Review Start Time First Review Title First Review Title First Review Title First Review Type + - Note: Tags can be created by Administrators using Tag Manager.	through browser
Recent Documents	Cancel	3

(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 <u>Fig. Demo Folder</u> <u>Template Folder Tags</u>

### Fig. Demo Folder Template – Folder Tags:

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Bac	k lee New Folder Check-In Check-Out Add	Create	Attach Views Shares Update Tags Versions Quick Look Refresh	Search
Doc	Add Template	-	(a) Folder Tags Permissions View Columns Requested Tags	-
2	Architectural     Audio Folder		Tag Value	
1	V Demo		(addressline1) Not Set	
62	Admin Contracto		{addressline2} Not Set	
Fav	Correspondence		{company} Not Set	
	Documents		(firstname) Not Set	
			(fullname) (b) (c) T	
	Example Real Estate Case		(title) Not Set	
	Movie Folder		{town} Not Set	
i i	► Rew Client		{salutation}	
Rec	<ul> <li>New Finance Client</li> <li>New Guardian ad Litem Matter</li> <li>New IV Matter</li> <li>New Nediation Matter</li> <li>New Mediation Matter</li> <li>New Mediation Matter</li> <li>New Mediation Matter</li> <li>New Mediation Matter</li> <li>Permissions Template</li> <li>Tag Order Template</li> </ul>	*	(d)	
	Add Folder Add File Apply this template retrospectively on save. See help for details.	5 (	Tags and Values that apply to the new folder	Close ?
-		_	() selected	6

(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:

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В	ack lee New Folder Check-In Check-Out Add	Create	Attach Views Shares Update Tags Versions	Quick Look Refresh	Search			
Doc	Add Template  V Templates  S Architectural  Addio Folder		Folder Tags	Permissions View Columns Requested Tags		+		
E Fav	<ul> <li>▶</li></ul>		{addressline}} {addressline} {addressline} (addressline)	Not Set	······································	2		
	a Image Folder		{firstname}	Not Set	~			
	B Movie Folder ► Sew Client		{fullname}	Not Set				
	▶		{title}	Not Set				
	Rew Finance Client     Rew Guardian ad Litem Matter		{town}	Not Set				
	▶ 🔜 New IP Matter		{salutation}	Dear	✓			
Rec	<ul> <li>▶ Sew Media Project</li> <li>▶ Sew Mediation Matter</li> <li>▶ Permissions Template</li> <li>▶ Personnel</li> <li>▶ Tag Order Template</li> </ul>	۰						
	Add Folder Add File		+ - Tags and Values that apply to the new fo	der				
	Apply this template retrospectively on save. See help for details.							

(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:

Demo							
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Back lee	New Folder Check-In Check-Out Add Create Attach Views Shares Update Tags Versions Quick Look Refresh	Search					
		+					
Docmoto	Name Folder Name: Folder Tag Ordering	Comment					
Contents	Folder Tags Folder Columns Document Tags						
🗍 Trash	Apply any tags and complete their values to help with this folder's categorization.						
Home	Tag Value						
Favourites	{salutation}						
Aardvark vldrick c.100	(firstname) Not Set						
Active Projects	(fullname) Not Set						
Admin	(company) Not Sat						
Alpha - Project	(addresslinet) (a)						
Application 1A.docx							
Authorities 1A.docx							
Doc Assembly - Letter	ture) Not set						
DocMotoent - UK.pdf	Not Set						
Images							
Last Will ATestaments							
Legal Area							
Test Folder	+ -						
Training	Note: Tans can be created by Administrators using Tan Manager						
Zeta							
Recent Documents	Cancel	?					
Knowledge Base	L						
Wonderfisx.2012).pdf							
DocMoto Ieck List.pdf							
Authorities 1A.docx							
Application 1A.docx							
2018.02.19Doc 1.docx							
DocMotont - US.docx 0 🗧 < 🗸 🖓 🛱 Root > 🕎 Root > 🛄 Contents > 🛄 Demo > 🛄 Folder Tag Ordering							
1 selected							

(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 <u>CHL Software</u> 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 <u>CHL Software</u> if you would like to know more.