



Userguide V1.1

enprovia® mDMS

Update Summary

| Date | Author | Version | Comment |
|------------|-----------------|---------|--------------------------------------|
| 01.12.2009 | Federico Sensi | V 2.0 | Added new Images |
| 26.11.2009 | Bo Stahlbrandt | V 1.1 | Added info on Alfresco, reformatting |
| 10.11.2009 | Bo Stahlbrandt | V 1.0 | Some reformatting |
| 10.11.2009 | Michal Martinka | V 0.1 | Did the basic work |
| | | | |

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1 Introduction

The mobile DMS client (mDMS) allows you to connect to your Document Management System (DMS) using a regular iPhone or iPod. There is also a BlackBerry® version of mDMS available from us.

With enprovia® mDMS you can search and navigate through folders (dossiers/matters) and documents located on your DMS. You can subscribe to changes on both documents and folders, notifying you about any modifications in real time. Furthermore, you can keep documents offline, stored locally in the mDMS's secure Vault.

enprovia® mDMS currently supports the following Document Management Systems:

- Scalaris® ASP
- Alfresco®
- Microsoft Sharepoint®
- Basically any DMS with WebDAV support

With our plugin-based system we can rapidly build support for other DMS's on request.

1.1 Installation

enprovia® mDMS is provided through the Apple iTunes application store and installed like any other iPhone applications.

Please note that you can only use the application on your iPhone or iPod after you have enabled the mDMS service on your Document Management System or ASP solution. Companies interested in mobile enabling their DMS can easily do so using the enprovia® mobileEnabler technology. For more information, see: www.enprovia.com/products/mobile/enabler

Depending on the features and license model of your DMS, you may not have access to all features described in this document. You may further have a limited number of named or floating mDMS licenses available for your company to use. The number of available licenses is verified by the application each time it is started. Should there not be any licenses available, you will be informed when you start it.

2 First use

2.1 Login to DMS

The first screen you'll see after the application is started is the login screen. You type your login information into the fields (white boxes). This is the data that was provided to you from your DMS.

To login, just tap the **Log in button** in top right corner. If you don't want to login and just want to browse your offline content located in the Vault, tap the **Work Offline button** in top left corner.

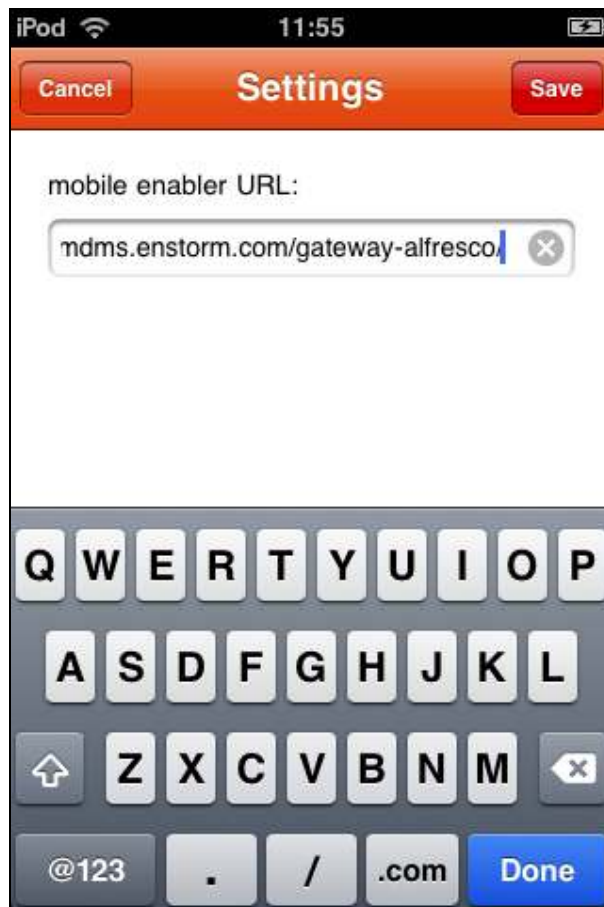
Please note: Multiple, wrong password entries will block the device from connecting to the DMS service. It must then be re-enabled by support staff.



Enter your credentials to login or click the Offline button to work with previously downloaded documents.

2.2 Settings

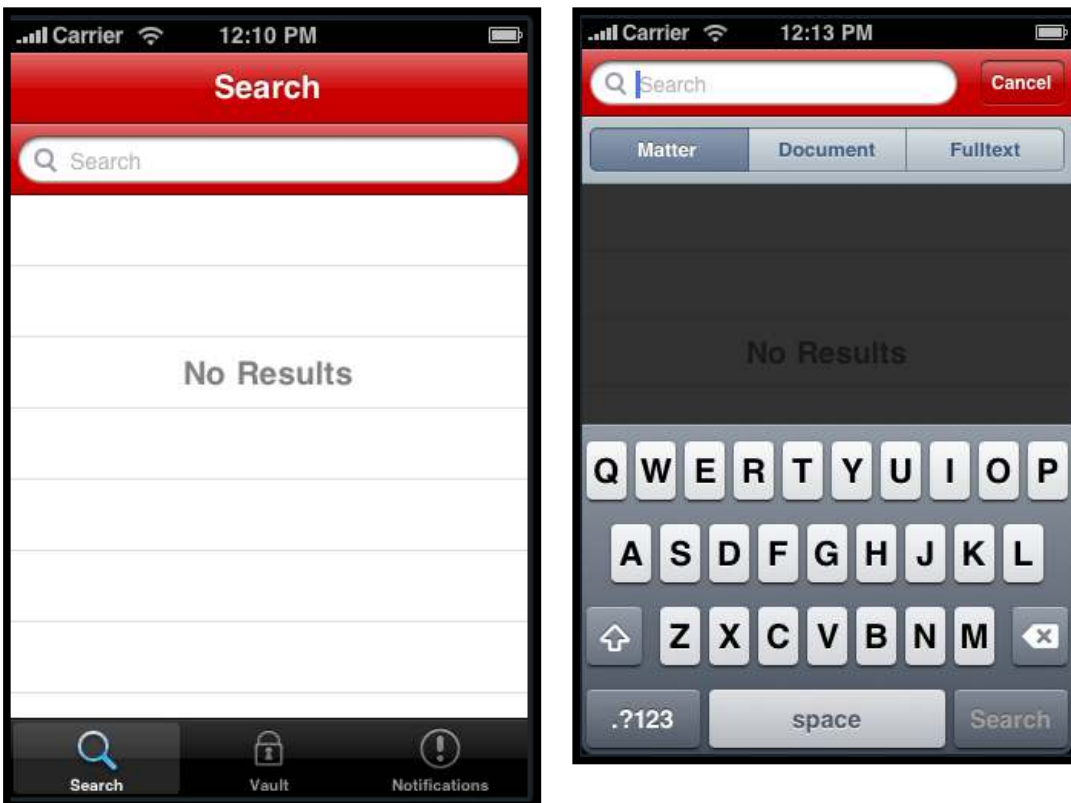
In the login mask, clicking on the bottom right *i* image it's possible to setup the gateway url needed to run the mDMS. By default the demo alfresco instance url is provided; that can be changed once you have your own gateway installed.



Enter your gateway url and click the save button.

2.3 Searching and navigating

After you have logged in, you will see the main Search screen. To start a new search, tap the white field (box) with the grey text “Search” located at the top of the screen. As you do this additional buttons will appear, letting you chose within which context you want to search. Depending on the DMS you are connected to, not all search features may be available: **Matter** (Dossiers, Folders...), **Document** and **Fulltext**.



To execute a search:

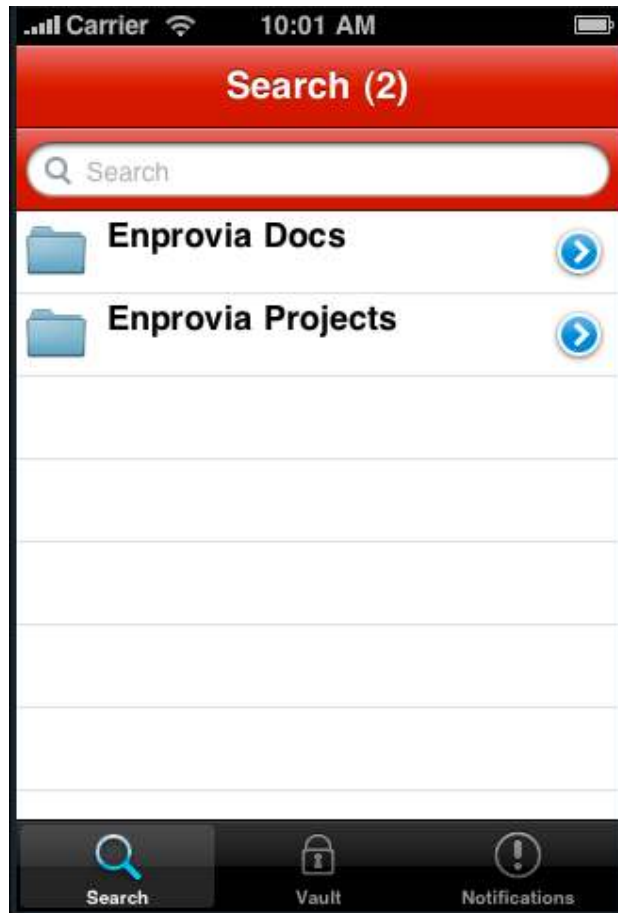
1. Tap the **Search field** and enter the search string.
2. Select the type of search:
 - **Matter button** to search for titles of matters (folders, dossiers...)
 - **Document button** to search in titles of documents
 - **Fulltext button** to search in content of documents
3. To run the search, tap the **Search button** located at the bottom right corner of the virtual keyboard.

After the search has finished, you will be presented with the results. The number of results is displayed in brackets in the top red bar after the text “Search”.

Depending on the type of search you executed, you will either see a list of matters or a list of documents.

If you searched in **Matters**, a list of matters is shown. You can open a matter by tapping it (tap the folder icon or the title of the matter to open it). You will see the content of the matter, typically a list of documents and other matters (sub-matters), which you can open.

If you tap the right arrow beside the matter, you will see the meta-data of that matter.



You can navigate through the result list of matters by tapping a matter to open it, drag your finger to scroll down/up through the results or tap the right arrow to see the meta-data (properties) of a matter.

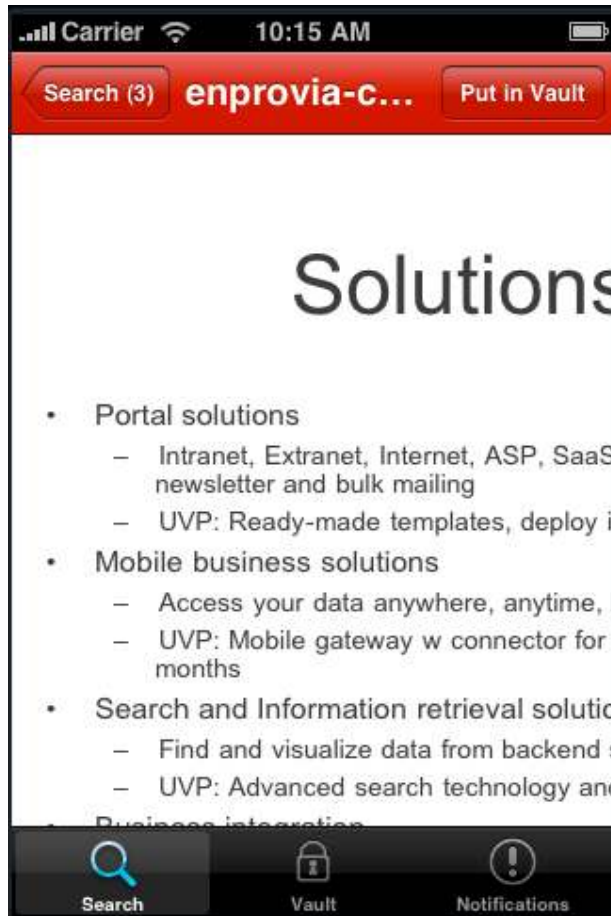
If you searched in **Documents** or used the **Fulltext** search function, a list of matching documents is shown. If you tap the document (the icon representing the document or the documents title), the document will be downloaded from the DMS and opened for viewing. Currently supported formats that can be viewed are MS-Word, MS-Excel, Adobe PDF, Plain text, JPG, GIF, PNG, BMP and the text content of MS-Outlook MSG files.



You can navigate through the result list of documents by tapping a document to see its content, drag your finger down/up to scroll through the results or tap the right arrow to see the meta-data, the properties of a document.

2.4 Putting a document into your Vault

To make your document available even if you are offline, you put it in the secure Vault. Start with opening the document and then tap the **Put in Vault button** located at the top right corner of the screen.



*An opened document can be put into the Vault, storing it on the iPhone, by clicking the button **Put in Vault** located in the top right corner.*

2.5 Properties of documents and matters

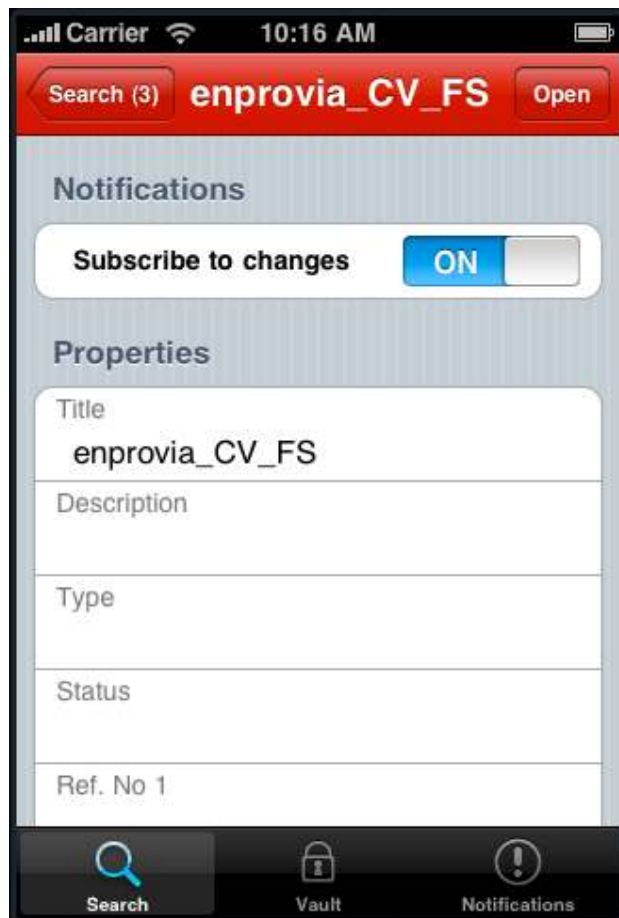
If you want to see the properties of a document or a matter, simply tap the circled, blue arrow, located at the right of each search result.

2.6 Subscription to changes

On the properties screen you can subscribe to changes of a document or a matter.

If you are subscribed to changes, you will receive a notification as soon as any modifications are done to the document or matter, allowing you to download it. Subscription is done on a per-document or per-matter basis. If you are subscribed to a matter, any changes to the matter itself, plus any changes done to any sub-matters or documents kept in the matter will be sent as a notification to you.

By default, you are not subscribed to any changes and the toggle switch labeled **Subscribe to changes** on the properties page is “OFF” (gray). To subscribe, tap the switch and it will switch “ON” (blue). To unsubscribe, tap the switch once more.



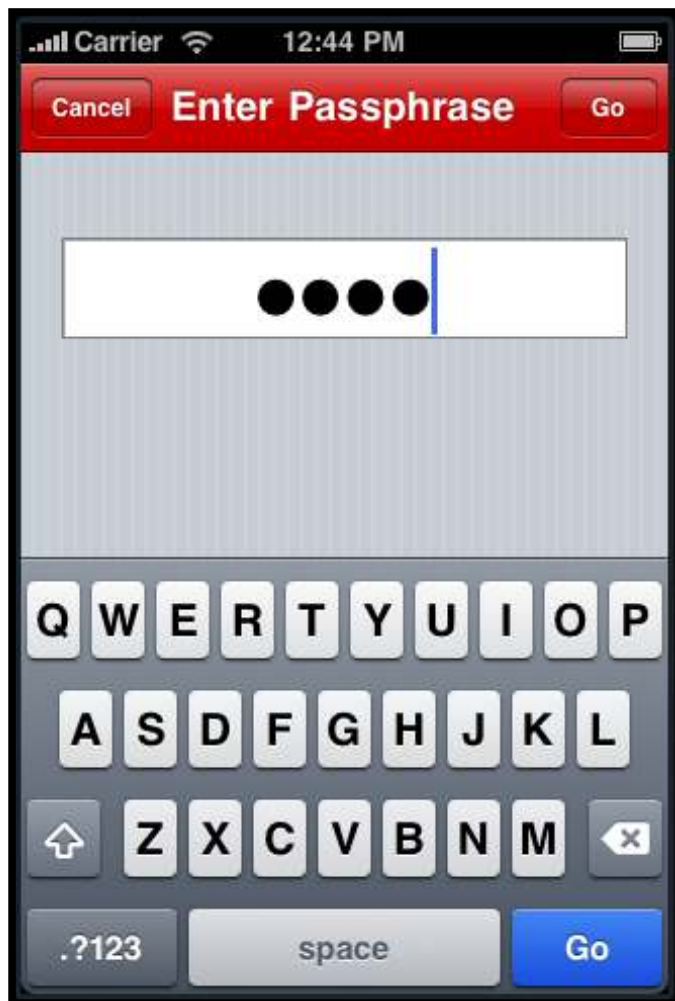
*Subscription to changes has been turned on and a notification will be received as soon as any changes are done to the document or matter. The document can also be viewed from the properties screen by tapping the **Open button**.*

2.7 Managing the Vault – Secure offline storage

enprovia® mDMS keeps saved documents in a secure offline repository, the Vault. This repository is protected by a passphrase.

To access your Vault and the documents it contains, tap the **Vault icon** located on the black bar at the bottom of the screen.

If you're accessing the Vault for the first time, you must set a passphrase. After you have entered the new passphrase once, you need to confirm it by re-entering it. If it has already been set, you will be prompted to enter it.



*Enter your passphrase to open the Vault.
The Vault stays unlocked as long as the application runs.
The first time you are accessing the Vault you must set
a new passphrase.*

When you are viewing the Vault, you can open documents by tapping on them, you can delete them from the Vault by tapping the **Manage button**, and you can modify the passphrase of the Vault by tapping the **Settings button**.

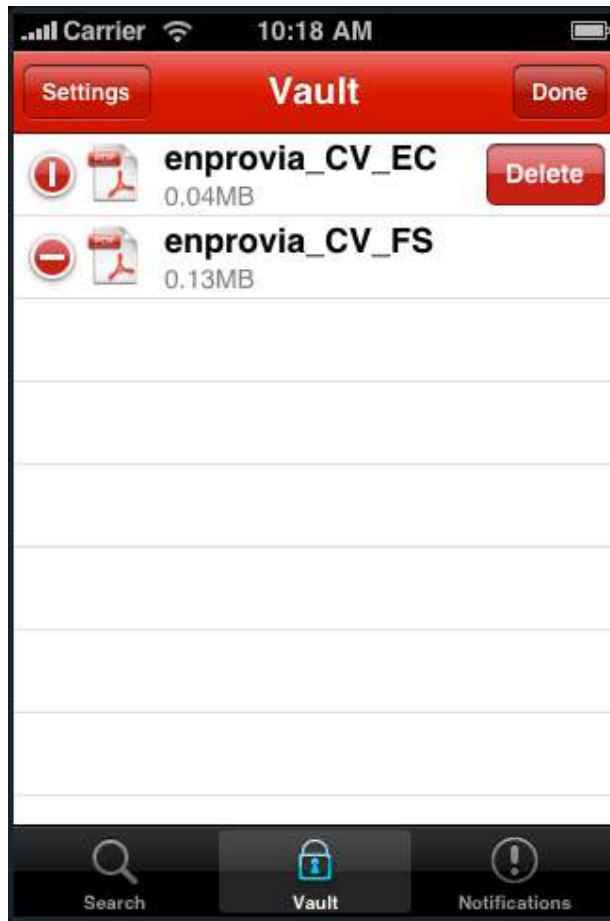


*When you are viewing the Vault in online mode, you are also seeing the bottom, black bar with the **Search**, **Vault** and **Notifications** icons placed on it. If you are entering the Vault directly from the login screen (i.e. you are in offline mode), the bar is not visible.*

2.7.1 Deleting documents from the Vault

To delete a document from the Vault, tap the **Manage button** located in the top right corner of the screen.

A list of documents will be shown where you will see a **red circle** on the left side of each document. When you tap this red circle, a **Delete button** will appear on the right side of the document. Tap the **Delete button** to delete the document. The document will only be deleted from the Vault (the local iPhone storage) and not from the DMS.



The Vault's "Manage view" allows you to easily remove documents from the Vault.

2.7.2 Changing passphrase of the Vault

To change the passphrase of the Vault, tap the **Settings button** located in the top left corner of the screen and a dialog will be shown, asking you to set your new passphrase. You need to enter it twice.

2.8 Notifications

Notifications are messages sent to your iPhone in real-time from the DMS. They alert you that a subscribed document or matter has been modified.

As long as your iPhone is powered on, you will see the notifications as a number beside the enprovia® mDMS application icon. If you have the application already open and running, you will see the number of notifications to the right of the **Notifications icon** on the black, bottom bar.

To view the notifications for your subscribed documents and matters, tap the **Notifications icon** on the black bar at the bottom of the screen.

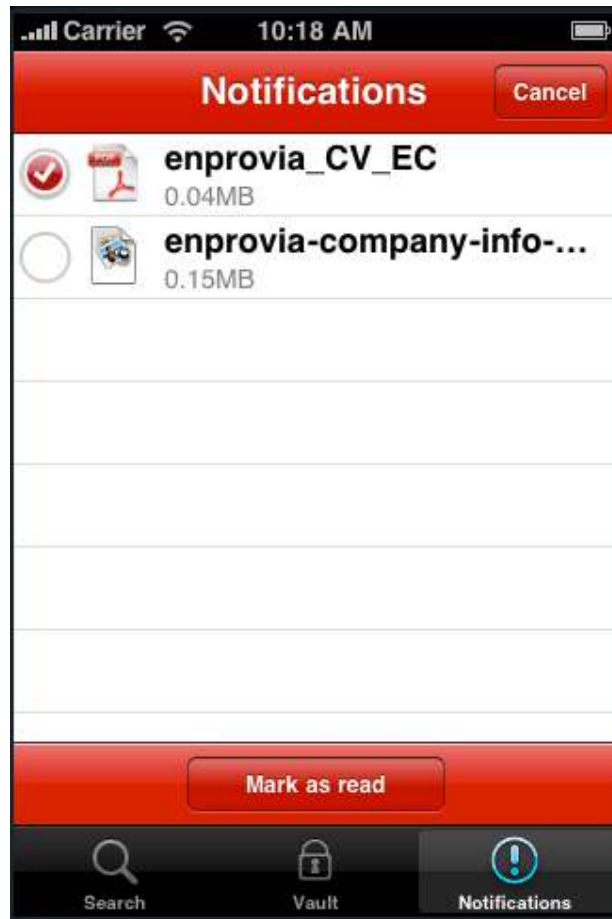


The notifications screen displays a list of all changed documents and matters that you are subscribed to. You can open the documents and matters, and view their properties, in the same way as on the Search screen.

2.8.1 Mark as read

To mark a notification as read, removing it from the list of notifications, tap the **Edit button** at the top right corner of the screen. A gray circle will appear on the left side of each line and button labeled **Mark as read** appears near the bottom of the screen.

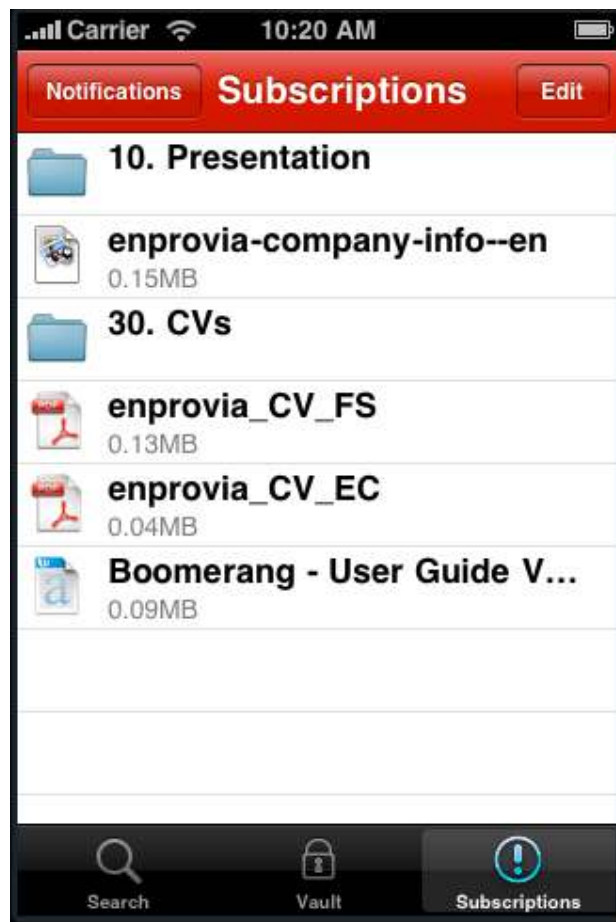
Tap the notifications that you want to be marked as read. When you tap a notification, a red check mark will be shown to indicate that the notification is selected. Tap the **Mark as read button** to mark the selected notifications as read and to remove them from the list.



The selected documents and matters will be removed from the notification list when you tap the Mark as read button.

2.8.2 Subscriptions

To see list of all subscribed documents and matters, tap the **Subscriptions button** at the top left corner of the Notification screen. Here you can unsubscribe to them by clicking on the **Edit button**, and you can go back to the Notifications view by tapping on the **Notifications button**.



All documents and matters you are subscribed to are shown in the subscription view.

2.8.2.1 Unsubscribing to a document or matter

To unsubscribe to a document or a matter, tap the Edit button in the top right corner of the screen. A list will be shown, where you will see a red circle on the left side of each document or matter. Tap this red circle and an **Unsubscribe button** will appear to the right. Tap this **Unsubscribe button** to unsubscribe from changes to the corresponding matter or document.

3 Final words

enprovia® Software Engineering s.r.o. is headquartered in Bratislava, Slovakia (60km from Vienna, Austria) with a subsidiary in Donaueschingen, Germany. You find us on the net at www.enprovia.com

3.1 Our product portfolio

Our customers achieve faster results at a higher quality using our products. See: www.enprovia.com/products for more information.

enprovia® mPresence – mobile enable your ecommerce. Expand your customer base and reach out to new, potential customers with mobile commerce on iPhone, Blackberry and other smart phones. Connect to the most common ecommerce solutions “out-of-the-box”.

enprovia® mDMS – mobile enable your Document Management and Electronic Content Management Systems. Access your data anywhere, anytime. Access your core assets securely and store documents in a secure offline storage. Receive notifications when documents, meta-data and folders/matters change.

enprovia® mobile enabler – A java based middleware technology allowing you to easily add plugins and business logic to fulfill your business requirements, mobile enabling your existing business systems with no modifications.

enprovia® Annotate! – Rapidly annotate images using loadable ontology and share within teams. Perfect for e.g. architects, construction & civil engineering, aerospace engineering, health care and photography.

3.2 Our solutions portfolio

We provide full software lifecycle management to our international customers.

Portal solutions

- Intranet, Extranet, Internet, ASP, SaaS, SEO&SEM, campaign management, newsletter and bulk mailing
- Value: Ready-made templates, deploy in days not months

Mobile business solutions

- Access your data anywhere, anytime, localized and geo-targeted
- Value: Mobile enabling technology for business with existing connectors and SDK's for iPhone, BlackBerry and Microsoft Mobile. Deploy in days not months

Search, information retrieval and annotation solutions

- Find and visualize documents, images and data stored in business backend systems.
- Value: Advanced search technology, smart & easy annotation with loadable ontology support. Ready-made tools. Integration specialists

Business integration

- Reduce costs and effort in B2B integration
- Value: Ready-made components. Integration specialists

Custom specific development

- Tailored made solutions
- Value: Strong JEE, Java, .NET skills. Any team configuration (your team, inhouse/external/expertise injection, teaching). Fix pricing possible

enprovia Software Engineering s.r.o.

www.enprovia.com

info@enprovia.com

Stefanikova 22

SK-811 04 Bratislava

Slovakia

Phone: +421-2-5262 03 53

Fax: +421-2-5262 03 52