



DocStar ECM Mobile App

User Guide

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Introduction

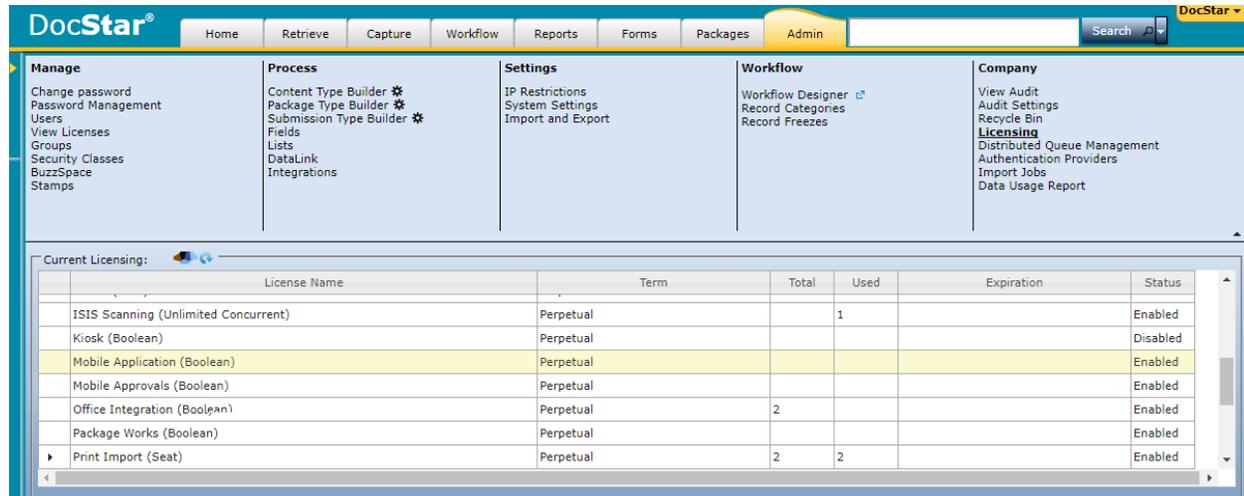
The DocStar ECM mobile app enables you to search, view content, approve, and email on the go. This guide will provide you with all you need to know to use the app.

Note: for users whose DocStar ECM software is deployed on premise, you will need to ensure that the server where the DocStar ECM software is installed is accessible to your mobile device.

Installation

Licensing

Installing the DocStar ECM Mobile App is a two-step process. First, licensing is required. A site administrator will need to activate the Mobile Application license on your DocStar site. This can be found in the Admin page by clicking on the **Licensing** settings found under the **Company** heading. If this is not enabled, click the refresh icon at the top of the licensing screen or contact DocStar support at support@docstar.com or 1-866-243-2240, option 4.



License Name	Term	Total	Used	Expiration	Status
ISIS Scanning (Unlimited Concurrent)	Perpetual		1		Enabled
Kiosk (Boolean)	Perpetual				Disabled
Mobile Application (Boolean)	Perpetual				Enabled
Mobile Approvals (Boolean)	Perpetual				Enabled
Office Integration (Boolean)	Perpetual	2			Enabled
Package Works (Boolean)	Perpetual				Enabled
Print Import (Seat)	Perpetual	2	2		Enabled

Enabling Universal Links

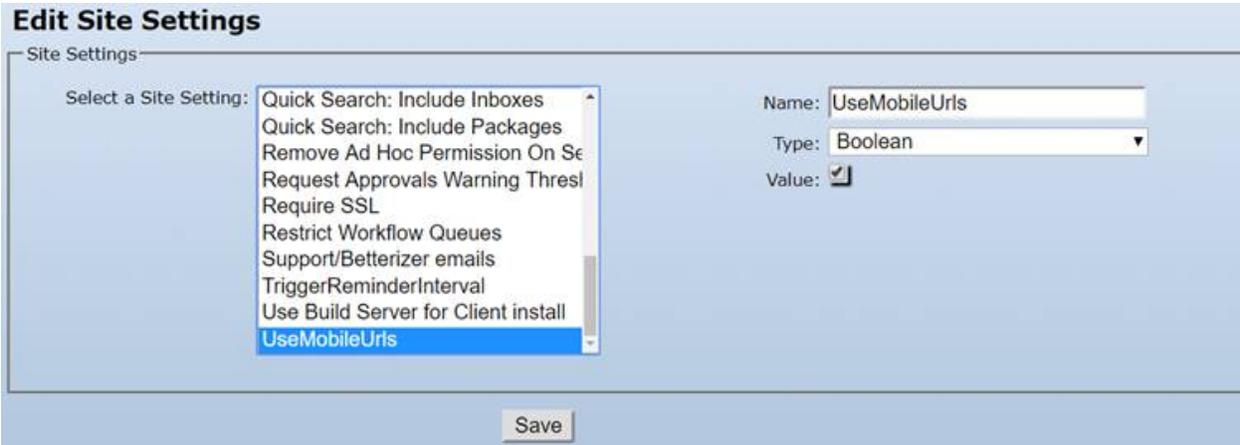
One feature you may want to take advantage of is Universal Links. Universal Links enable the all links sent from your DocStar site to be formatted such that the mobile app will intercept these links. Note that your device will need to have web access (specifically to *eclipse.docstar.com*).

If your DocStar server is on premise, it will need to be placed in the DMZ so it may be reachable outside of your network.

The mobile app registers *eclipse.docstar.com* as a URL it handles, so the URLs will need to be declared at the time of deployment.

By default, links to documents in emails from version 17.52.37019 forward will all go through *eclipse.docstar.com*. This way, if the user has the mobile app installed, it will handle the request and display the document in app. Otherwise, *eclipse.docstar.com* will simply redirect to the original link and will open in your device's default browser such as Safari (on iOS) or Chrome (on Android).

This behavior can be toggled on or off (on by default) in System Settings by adjusting the 'UseMobileUrls' setting:



Installing the Application

iOS:

Open the App Store and search for “DocStar”.

Once you have found the App, tap on “Get” and enter your Apple ID and password if prompted.

Tap on the DocStar icon to launch the App.

Android:

Open the Play Store and search for “DocStar”.

Once you have found the App, tap on “Install” and enter your Google account name and password if prompted.

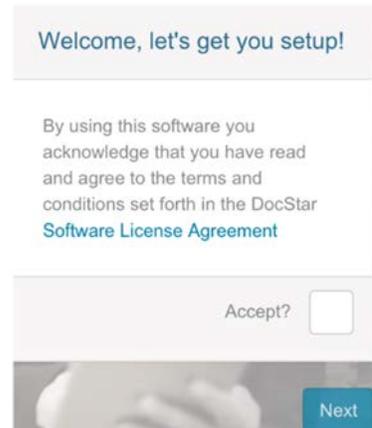
Go to your home screen and tap on the DocStar icon to launch the App.

Using the DocStar Mobile App

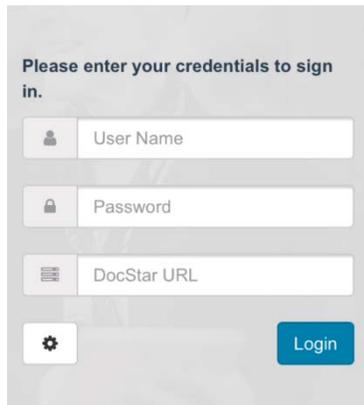
License Agreement

Before you're able to log in, you'll need to accept the terms of the DocStar ECM License Agreement. Tap on Software License Agreement to view it, scroll down to the bottom, and then tap *Close*.

Check the *Accept?* check box and tap *Next*.

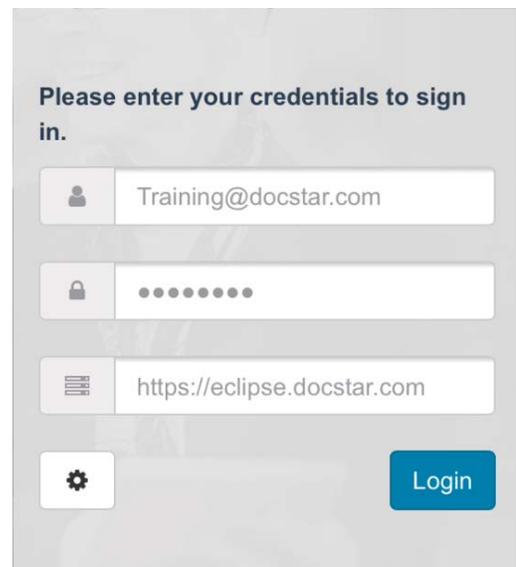
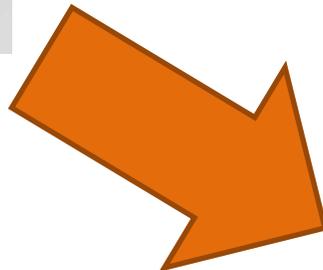


Login



To log in, you'll need to provide the app with your username, password, and the URL of your site in the format of <https://eclipse.docstar.com>, then tap "Login."

The gear icon will show and hide the DocStar URL field.



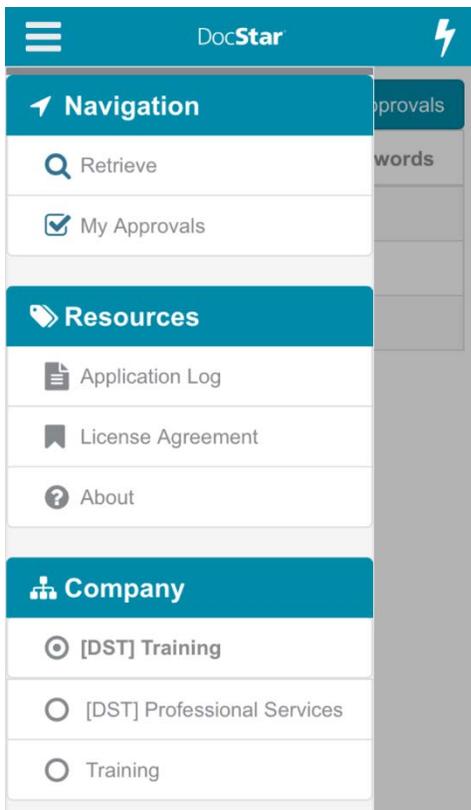
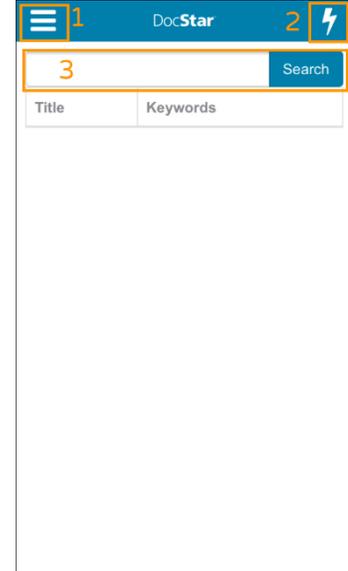
Navigation and Operation

When you first log in, you will land on the Retrieve screen. You have several options available to you from here.

Tapping on the hamburger icon (1) will open your navigation shortcut menu.

Tapping on the lightning bolt icon (2) will allow you to log out.

The quick search box (3) is available and allows you to search just as you would when using the quick search when accessing DocStar from a PC or laptop device.



The Hamburger menu grants you access to a number of features. Below are their names and descriptions:

- ▶ **Retrieve:** Allows you to search for items using a quick search.
- ▶ **My Approvals:** Shows all of your approvals, whether requested via workflow or ad hoc.
- ▶ **Application Log:** Provides the ability to view debug information and status messages.
- ▶ **License Agreement:** Here you can view the legal agreement for using the DocStar Mobile Application.
- ▶ **About:** Contains information about the version of DocStar you're using.
- ▶ **Company Selector:** Allows you to move between multiple companies if you are a member of multiple companies. If not, this section will not appear. Tap on a company to switch to the desired company.

Retrieve



Title	Keywords
1004_Invoice	
1014_Invoice	
1015_Invoice	
1016_Invoice	
1017_Invoice	
1018_Invoice	
1019_Invoice	
1020_Invoice	
1021_Invoice	
1022_Invoice	
1023_Invoice	
1024_Invoice	

You can quick search in the DocStar app just like you can in the desktop version. Enter your search terms in the quick search bar, then tap the *Search* button.

You may also search without any terms for a full listing of everything in your site. This is the same as a pure wildcard search in the standard desktop view.

Just as it is if you are using DocStar in a desktop setting, wildcard searching is supported – for example, searching with an asterisk inside of a word will yield the desired results: searching for *inv*ce* will search for every occurrence of “*inv*” and *anything*, followed by “*ce*.”

The mobile app will display *Title* and *Keywords* for all content items retrieved by your search.

Some notes regarding retrieval:

- ▶ Custom fields and the column chooser are not supported at this time.
- ▶ You can scroll down infinitely to view more results.
- ▶ Tap on a document to open it.

My Approvals

The My Approvals screen will bring you to a screen which shows you documents awaiting an approval from you, whether the approval is requested by workflow or via ad hoc methods.

Tap on a document to open it.

You may also narrow down your list of approvals by searching.

Enter your criteria in the search box, then tap *Search My Approvals*.

Title	Keywords
Invoice #1030 :: 5/7/2017	
Invoice #1031 :: 5/9/2017	
Invoice #1032 :: 5/10/2017	

Viewing Content

DocStar

Approve Deny

Content Fields

Title: Invoice #1030 :: 5/7/2017

SecurityClass: Accounting

Workflow:

Folders:

Created: 10/4/2017

EAP VendorName: Atlantic Powers, Inc.

EAP InvoiceNumber: 1030

EAP InvoiceDate: 5/7/2017

EAP InvoiceAmount: \$1,753.84

EAP Dept Mgr: Training@docstar.com

Keywords:

You'll see your options for approving and denying at the top of the screen, as well as all of the document's metadata and approval history.

Scrolling

If you scroll down, you can see the approval history for the document, so if you have an approval request or other users have already approved or denied the document, you may see that information.

DocStar

Package:

BL InvoiceNumber: 1030

BL InvoiceDate: 5/7/2017

Invoice No:

EAP Vendor: Atlantic Powers, Inc.

EAP Invoice No: AP1

EAP DocType: Invoice

History

Approvals

! Training@docstar.com:
Requested by: AP@docstar.com
(2/15/18 4:13 PM)

Swipe up or down to scroll

Panels

DocStar

Content Fields Collapsed

History Expanded

Approvals

! Training@docstar.com:
Requested by: AP@docstar.com
(2/15/18 4:13 PM)

Both the History panel and the Content Fields panels may be collapsed or expanded.

Tap on a panel header to collapse or expand it.

When a panel header is orange, it has been expanded.

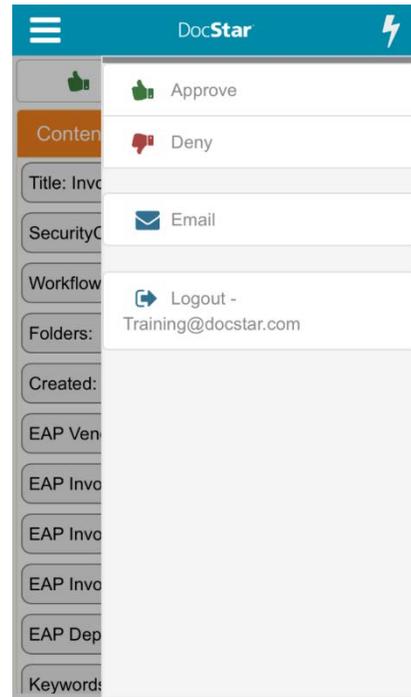
When a panel header is teal, it has been collapsed.

The Actions Menu

Tapping on the lightning bolt icon while viewing a document will open your Actions menu.

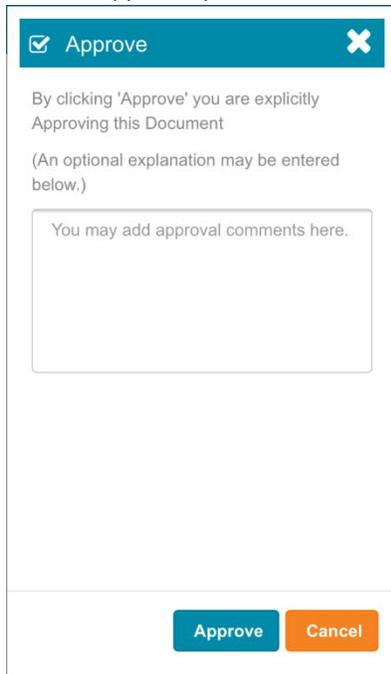
From here, you may:

- ▶ [Approve](#) or [Deny](#)
- ▶ Recall an [Approval](#) or [Denial](#)
- ▶ [Email](#) the document you're currently viewing
- ▶ Log out



Approving and Denying

In many situations, you'll be sent an email to approve a document. If you've used DocStar from a PC or laptop, this operates in the mostly same manner. What is different is how the app responds: tap the link in your email, and the DocStar App will open the document.

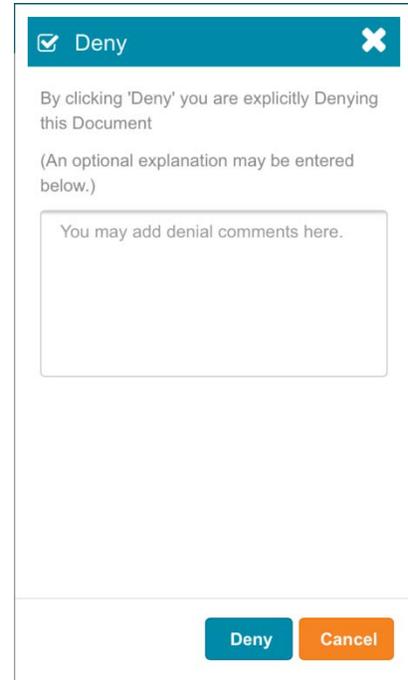


Tap on the *Approve* or *Deny* buttons to approve or deny. You may also add your comments, then tap *Approve* or *Deny* at the bottom of the screen. You may also tap *Cancel* to return to viewing the document without approving or denying.

Your approval or denial will be recorded, and you can see the history of your approval or denial at the bottom of the document viewer screen.

You may also tap the corresponding button at the top of the screen to recall your approval or denial.

If you want to recall an Approval, tap *Recall Approval*.



To recall a Denial, tap *Recall Denial*.

Recalling an Approval or Denial will erase your previous Approval or Denial for the document and allow you to choose the either option if needed.

Note that if your Approval or Denial has moved the workflow on past the Approval process, and you've recalled your Approval or Denial, you may email your team members to notify them using the [Email](#) function.

Email

The screenshot shows the 'Email' widget in the DocStar mobile app. It is titled 'Email' with a close button (X) in the top right. The widget is divided into several sections:

- 1** Email: A text field containing 'user1@example.com, user2'.
- 2** Subject: A text field containing 'DocStar ECM - Invoice #10:'.
- Body**: A section with a 'Text Message (optional)' text field (**3**).
- 4** A section titled 'View Only' with the subtitle 'Send Current Static Copy of the Document'. It contains several options:
 - Send Link to .zip
 - Send As Attachment
 - Format selection: Native, PDF, TIFF
 - Select Pages: A text field with the instruction 'Enter page numbers and/or page ranges separated by commas. Example: 2,5-10'.
 - Include Annotations
 - Include Redactions
 - Create as a Single File
 - Do not zip attachments
- 5** A section titled 'Direct Link to view in DocStar (DocStar user only)' with a radio button and the text 'Current Document Version'.
- 6** Password: A text field with the placeholder 'Optional (applied to ZIP only)'. Above it are 'Link' and 'Generate Link f' buttons with icons.
- 7** Remember these settings?: A checkbox.
- 8** Action buttons: 'Email Client' (with an envelope icon), 'Send' (with a paper plane icon), and 'Cancel' (in an orange button).

Tap on the lightning bolt icon while viewing a document to open the Actions menu, then tap on Email.

From the email widget screen, you'll see a variety of options. The following is a description of each and information about each function.

- 1. Recipients:** You may choose your recipients and should you choose to grant DocStar access to your contacts, you may choose from a list of contacts on your mobile device.
- 2. Subject:** The DocStar ECM Mobile App will automatically populate the subject of your email with the title of the document you are viewing, but you may change it if you like.
- 3. Body:** You may enter a message to pass along to your recipients and add any relevant details you wish to include.
- 4. Attachment Options:** You may send a link to a zip file and/or send the document as an attachment to your email. Should you wish to include annotations and/or redactions, choose a page range, or send a previously burst document as a single, contiguous document, you may do so by converting it to a PDF or Tiff.
- 5. Direct Link:** If you are sending this email to a team mate – or another user who has access to your DocStar site, you may do so by choosing this option.
- 6. Custom Link and Password:** You may choose to generate a custom public link if you desire. You may also choose to protect your content with a password. Note that if you choose to zip attachments, this password will apply to the zip file as well!
- 7. Remember these Settings:** If you want to preserve the same mix of settings for each time you email, check this box.
- 8. Email Client or Send:** If you tap *Send*, DocStar will send your email from the server. If you tap *Email Client*, your mobile device's default Email App will open, allowing you to further customize your email.

You may also tap *Cancel* to return to viewing your document.

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.