

DOCLOGIX MOBILE APP (ANDROID)

INSTRUCTIONS FOR THE USER

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1. GETTING STARTED

When you download DocLogix mobile app for Android users and open it for the first time, you will see log in window. There you need to enter document management system address, user name and password. In addition, you can choose user interface language.

1.1. LOG IN

In the opened window enter your **DocLogix server URL** (if you do not know, contact your system administrator), **User name** and **Password**.

Click *Connect*, after you enter all the information.

User is connected. The main window (My tasks) is shown where all current user tasks are displayed.



2. ACTIONS WITH DOCUMENTS TASKS

After log in, you can see active tasks in the main window. Above the task view, in the brackets, you can see the number of all current tasks.

If you click search icon on the right corner, the search field will open and you will be able to search through all the active tasks.

List item consists of:

- Due date, until the task must be completed (if defined);
- Task title (bold font);
- Document title;
- Red asterisk near the task (if task completion is delayed).

You can see detailed information about the task when you click on the list item.

Additional menu

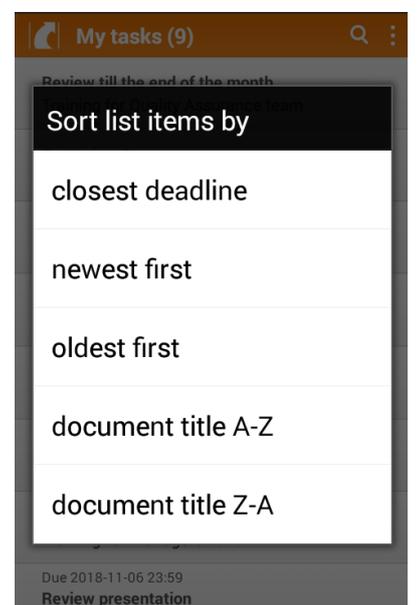
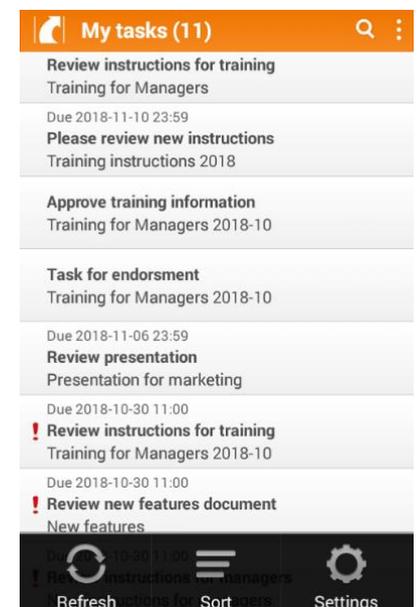
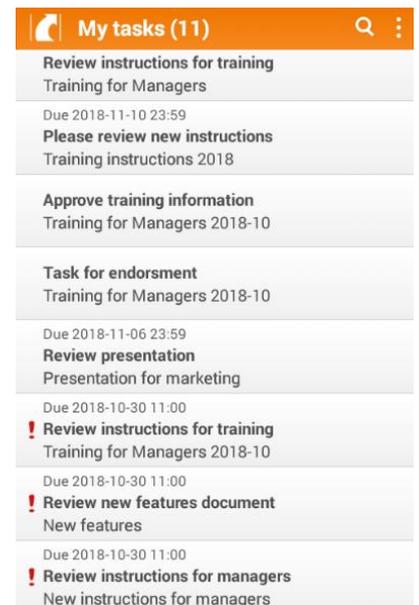
To access additional menu, click three dots icon on the right corner. Menu has following options:

- Refresh;
- Sort (more information **Search and sort**);
- Settings (DocLogix server address, log in details checkbox, language settings).

Search and sort

You can search for tasks using Search tool. Click on the search icon and the search field will open above the tasks list. There you can search for tasks among the active ones.

Additionally, you can sort tasks according defined criteria. To do that, in additional menu, select **Sort** and choose from the list of possible criteria.



2.1. TASK VIEW

To view task, in the main page select task and click on it.

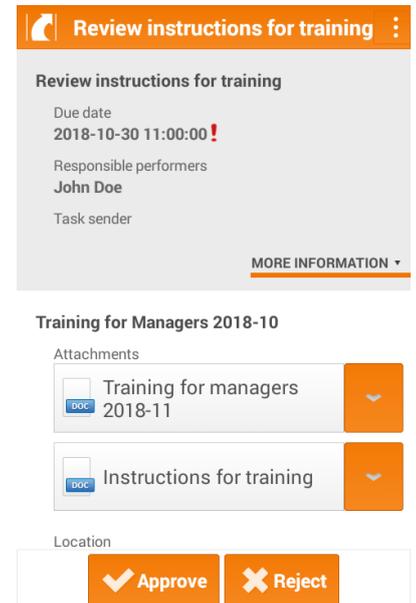
In the opened window, the following is displayed:

Task information

- Task title;
- Due date (if defined);
- Responsible performers;
- Task sender;
- Red asterisk (if task completion is delayed);
- Possible actions with document (approve, complete, review, reject etc.).

Document information

- Document title;
- Attachments (files);
- Attributes, that are displayed, may vary (it depends, which attributes are configured to be shown in the app).



2.2. ACTIONS WITH DOCUMENT ATTACHMENTS

In order to view document attachments, you need to have tasks with documents that have attachments.

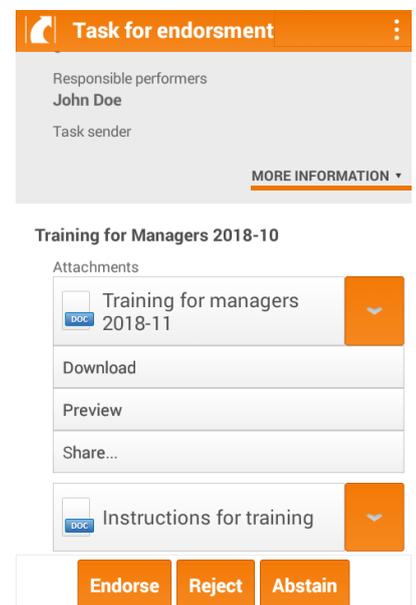
There is an arrow on the right side of the attachment line, if you click on it, the menu will open, containing following options:

- Download (the attachment will be downloaded to your phone);
- Preview (the attachment will be opened for preview);
- Share... (ability to share attachment through apps on your phone).

Download

When you choose download, program saves the attachment to your phone. After downloading, the attachment is opened in the program that supports attachments format.

You will get error message if you do not have required program to open such files on your phone.



Preview

When you click on the attachment, or choose preview, the attachment is opened in the DocLogix app. Attachments title is displayed on the top. If you click the arrow icon on the right corner, you will be able to view documents pages.

Share...

When you choose share, you can see available sharing options in the opened window. You can choose the app through which to share the document.

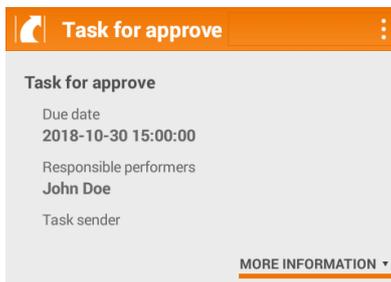


2.3. APPROVE/ENDORSE A DOCUMENT

In order to approve/ endorse a document, you need to have tasks for approval/ endorsement.

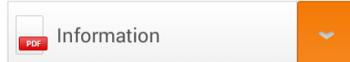
Open task that you want to approve/endorse. At the bottom, click *Approve/Endorse*.

Enter comments regarding approval/endorsement (not required) and click *Approve/Endorse*.



Training for Managers

Attachments



Registration number
Q548S1

Location
Training

Approve Reject



Training for Managers

Attachments



Registration number
Q548S1

Location
Training

Endorse Reject Abstain

2.4. REJECT APPROVE/ENDORSE TASK

In order to reject approve/ endorse task you need to have tasks for approval/ endorsement.

Open approve/endorse task. In the opened window, at the bottom, click *Reject*.

When you rejecting a task it is necessary to enter comment. After that, click *Reject*.

2.5. SIMPLE TASK COMPLETE

In order to complete simple task you need to have tasks for review.

Open task that you want to complete. In the opened window, at the bottom, click *Complete*.

2.6. TASK DELEGATION

In order to delegate task you need to have tasks for review, approve or endorse with delegation enabled.

Open task that you want to delegate. In the opened window, at the bottom, click *Delegate*.

In the search field, enter user to whom you want to delegate this task and click *Delegate*.

2.7. DOCUMENT SIGNING

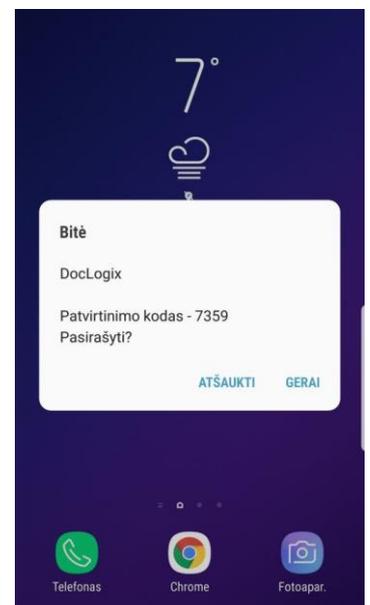
In order to approve/ endorse task with mobile signature, you need to have tasks for approval/ endorsement with required signature.

Open task that you want to approve/endorse with signature and click *Approve/Endorse*.

In the opened window, choose:

- **Signature purpose;**
- **Main document** (if document has more than one attachment, in this field you can choose main document);
- **Additional attachments** (tick, which documents will be signed).

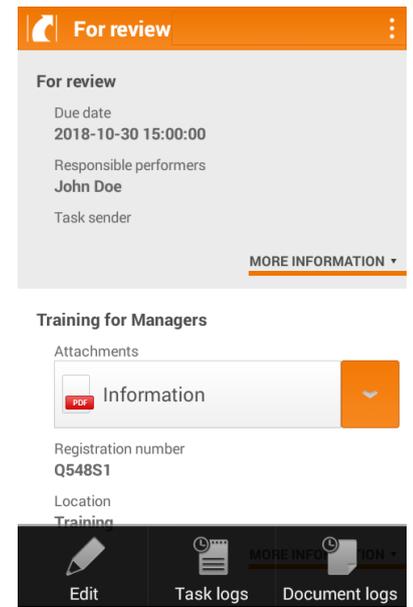
After clicking *Next*, you will receive approval code to your phone. When you accept the code, the document will be signed.



2.8. ADDITIONAL MENU IN TASKS

To access additional menu, click three dots icon on the right corner. Menu in task has following options:

- **Edit** (allows to modify changeable tasks or documents fields);
- **Task logs** (allows to view past actions with the task);
- **Document logs** (allows to view past actions with the document).

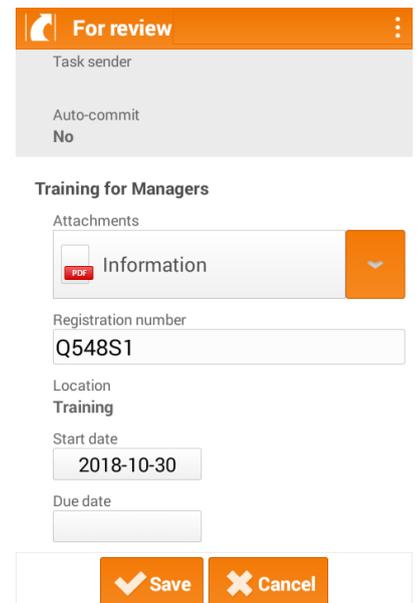


2.9. MODIFY TASK OR DOCUMENT

You can modify task and/or document editable fields. It depends on your permissions and documents status.

Open task, which fields you want to modify and click three dots icon on the right corner. In the opened additional menu select, *Edit*. The window is refreshed and some fields become editable.

After modifying, it is necessary to click *Save*, because otherwise all the changes will be lost.



2.10. LOG

You can view tasks or documents log by clicking on the additional menu and selecting **Task log** or **Document log**.

Task logs

Task log has two tabs:

- Actions;
- Performers.

The information captured in Task action log:

- Action date and time;
- Action performer;
- Action title;
- Comment (if entered).

The information captured in Task performers' log

- Performers title;
- Completion status.

Task logs	
ACTIONS	PERFORMERS
2018-10-30 14:43 Admin Admin: Create	
2018-10-30 14:43 Admin Admin: Send for endorsement	

Task logs	
ACTIONS	PERFORMERS
	John Doe: Active

Document logs

Document log has two tabs:

- Actions;
- Tasks.

The information captured in Document action log:

- Performers title;
- Completion status;
- Completion date;
- Comment on action.

The information captured in Document task log:

- Start date/time;
- Title;
- Task action;
- Date/time completed.

Document logs	
ACTIONS	TASKS
2018-10-30 14:43 Admin Admin: Create	
2018-10-30 14:43 Admin Admin: Check-in	
2018-10-30 14:43 Admin Admin: Update	
2018-10-30 14:43 Admin Admin: Send for endorsement	
2018-10-30 14:44 Admin Admin: Send for approval	

Document logs	
ACTIONS	TASKS
2018-10-30 14:48 For review: Review	
2018-10-30 14:44 Task for approve : Approve	
2018-10-30 14:43 Task for endorsment 2: Endorse	

When you click on one document task, the task information window will open. The lists logs are sorted by action date starting from earlier.