

# DOCLOGIX MOBILE APP (IOS)

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## INSTRUCTIONS FOR THE USER



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## 1. GETTING STARTED

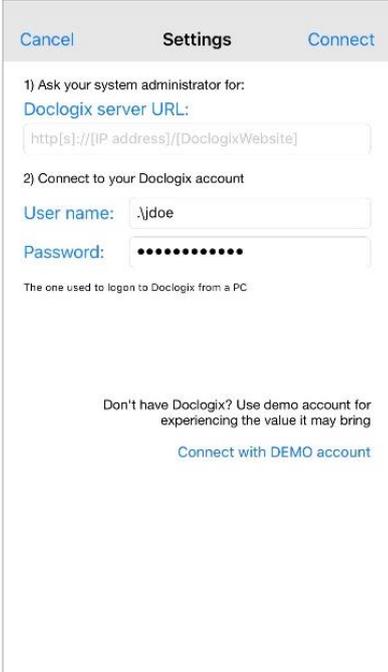
When you download DocLogix mobile app for iOS users and open it for the first time, you will see welcome message. After clicking start, settings window is opened. There you need to enter document management system address, user name and password.

### 1.1. LOG IN

In the opened Settings 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.



The screenshot shows the 'Settings' window of the DocLogix mobile app. At the top, there are three buttons: 'Cancel', 'Settings', and 'Connect'. The main content area is divided into two sections:

- 1) Ask your system administrator for:**  
**Doclogix server URL:** A text input field containing the placeholder text 'http[s]://[IP address]/[DoclogixWebsite]'.
- 2) Connect to your Doclogix account**  
**User name:** A text input field containing the text '.\jdoe'.  
**Password:** A password input field with ten black dots representing the password. Below this field, there is a small note: 'The one used to login to Doclogix from a PC'.

At the bottom of the window, there is a message: 'Don't have Doclogix? Use demo account for experiencing the value it may bring' followed by a blue link: 'Connect with DEMO account'.

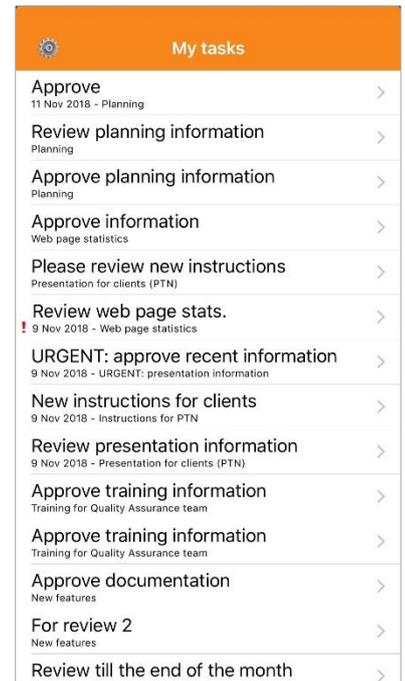
## 2. ACTIONS WITH DOCUMENT TASKS

After log in, you can see active tasks in the main window.

List item consists of:

- Date, when the task was assigned (if due date is defined);
- Task title (bigger font);
- Document title (smaller font);
- Red asterisk (if task completion is delayed);

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



### 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:

#### Document information

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

#### Task information

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

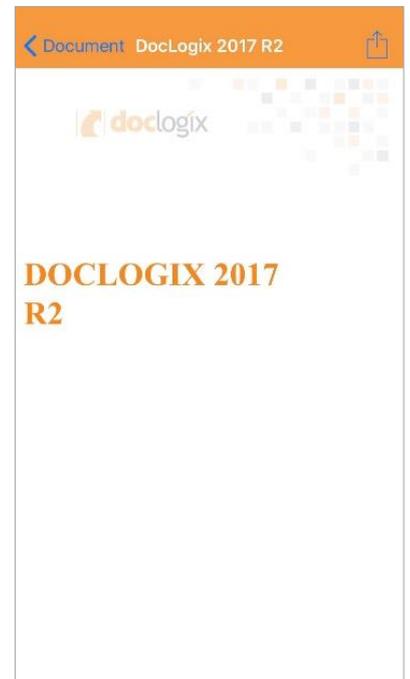


## 2.2. ACTIONS WITH DOCUMENT ATTACHMENTS

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

Select attachment and click on it. Selected attachment is opened for preview.

In the opened window, if you click the icon in the right corner, you will be able to share, copy or download selected file.

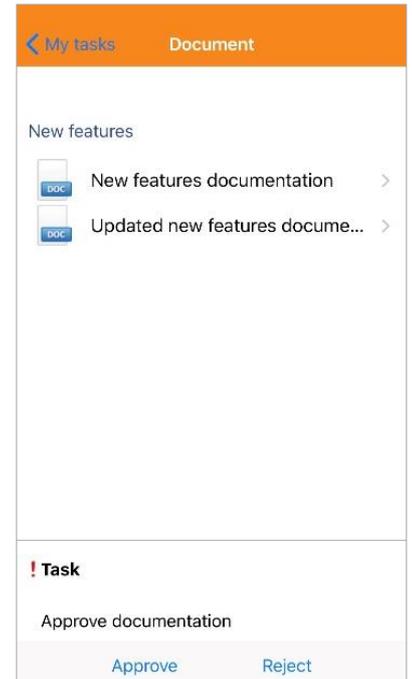


## 2.3. APPROVE/ENDORSE A TASK

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.

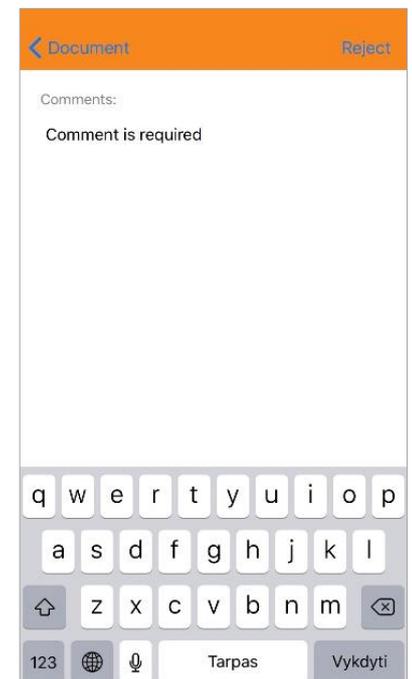


## 2.4. REJECT APPROVE/ENDORSE TASK

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*.

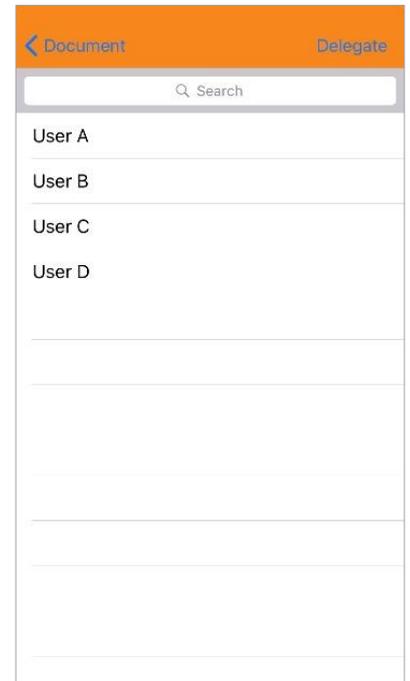
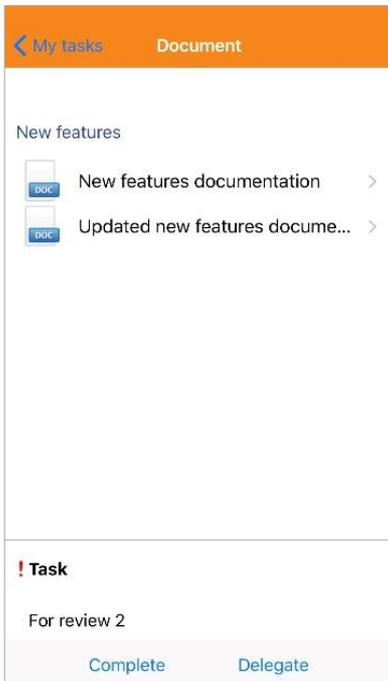


## 2.5. DELEGATE A TASK

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*.

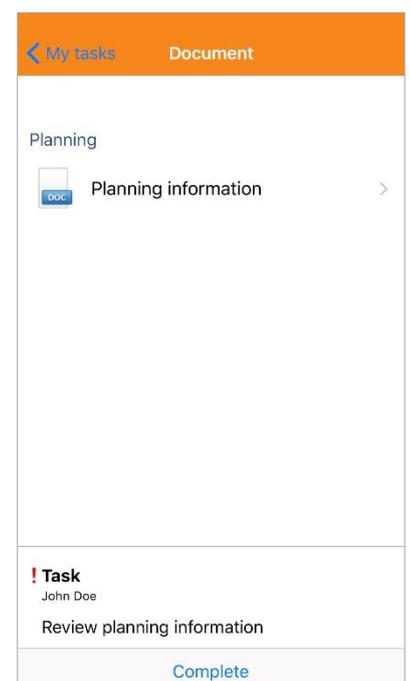
In the search field, enter user to whom you want to delegate this task and click *Delegate*.



## 2.6. 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*.



## 2.7. 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.

The screenshot shows a mobile application interface for document signing. At the top, there is an orange navigation bar with three buttons: a back arrow followed by 'Document', 'Sign' (the active screen), and 'Next'. Below the navigation bar, the screen is divided into several sections. The first section is 'Signature purpose' with a dropdown menu currently showing 'Signature'. The second section is 'Main document' with a dropdown menu showing 'New features documentation'. The third section is 'Additional attachments to sign', which includes a toggle switch (currently turned on) and a document icon with the text 'Updated new features docume...'. Below these sections, there are several empty text input fields for additional information.