NewgenONE OmniDocs

Mobile

User Guide

Version: 11.3

Disclaimer

Newgen Software, Registered Office, New Delhi
E-44/13
Okhla Phase - II
New Delhi 110020
India
Phone: +91 1146 533 200
info@newgensoft.com

Contents

Preface

This user guide provides detailed instructions on using the NewgenONE OmniDocs Mobile app and its various components, including Dashboard, Search, OmniProcess, Repository, User Settings, and more. It aims to familiarize users with the functionalities and features of OmniDocs Mobile for efficient document management and collaboration.

Revision history

Revision date	Description
July 2024	Initial publication

Intended audience

This user guide is intended for users who work with the NewgenONE OmniDocs Mobile app for document management tasks. It is suitable for individuals and organizations handling sensitive and critical business documents. Readers are expected to have a conceptual understanding of document management systems (DMS), including archival, indexing, and retrieval processes. The app includes a user and rights management framework to ensure appropriate visibility and access to NewgenONE OmniDocs Mobile components based on user profiles such as knowledge workers, administrators, senior management, and so on.

Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

NewgenONE OmniDocs Mobile offers an efficient way for you to access and leverage your enterprise content on the go. It allows you to continue your work even when you are away from your desk. The mobile app connects with your enterprise OmniDocs installation, whether it's in the cloud or on-premises.

NewgenONE OmniDocs is a market leading solution, empowering businesses to realize and unleash the power of their enterprise content.

With NewgenONE OmniDocs Mobile you can:

- View enterprise documents from your OmniDocs in-cloud or on-premises installation
- Advanced searches on documents and folders
- View and access important metadata of content
- Leverage native features of the device to capture and upload them to the OmniDocs Server
- Create folders and upload them to the OmniDocs server
- Perform checker tasks of OmniProcess

The app offers extensive security features for your critical and sensitive information including:

- User authenticated access to the OmniDocs server
- Safely exchanging data over HTTPS

Though the screens used in this document are taken from an iOS mobile, you can refer to the same document for both Android and iOS mobiles. This is because, functionality wise there is no change.

Signing in to NewgenONE OmniDocs Mobile

Only those users can sign in to NewgenONE OmniDocs Mobile Application who have an NewgenONE OmniDocs account.

To sign in to NewgenONE OmniDocs Mobile, perform the following steps:

1. Tap OmniDocs application icon from the screen of your device. A splash screen appears, followed by a carousel.
2. Swipe left or tap **Next** to navigate the carousel.
3. Tap **Let's Start!** or on the upper right corner tap **Skip** to go to the Server Details screen. Here, you are required to specify the details of the server where OmniDocs is running.
4. Enter Server Address and tap **Connect.** The login screen appears.

    - This is a one-time activity and must be performed the first time you launch the App.
    - The **Connect with different server** option allows you to change the server by entering different server details. It can be accessed from both the Server Details screen and Login screen.

5. Specify the Cabinet name, Username, and Password.

    The option to select a cabinet appears if there are multiple cabinets to select from.

6. Tap **Login** to proceed further.
    On successful sign-in, a new screen appears prompting you to apply face or fingerprint authentication on OmniDocs for Mobile depending on your device's settings.
7. Tap **Allow** to add biometric detection or tap **Skip** to avoid biometric detection.
8. Create a 4-digit mPIN for easy sign-in. Enter the mPIN and then confirm it by re-entering. Tap **Set mPIN**.
    On successful setup of mPIN, a prompt appears with the option Go Back to Login.

    You can unlock the OmniDocs for Mobile using mPIN, face/fingerprint detection, or both configured for your device

9. Tap **Go Back to Login** to proceed further.
    A new screen appears prompting you to unlock the OmniDocs for Mobile using the saved mPIN, face or fingerprint detection, or both for your device. You can also

sign in using username and password.
On successful sign in, you are directed to the default screen (Home) of the App.

If you're unable to sign in, it might occur due to the following reasons:

Option	Description
User Already Logged-in	If you are already logged in on another device, a notification will appear informing you that you are logged in elsewhere. To disconnect from the other device and continue on this one, tap Login else, tap Cancel.
Invalid Login Information	A notification "Invalid Login Information" appears if the entered login credentials are incorrect. Also, if you fail to provide correct login credentials, for the maximum number of allowed attempts, then your account gets locked. The OmniDocs Administrator, Supervisor or a member of the Supervisor Group can unlock such account.
Forgot Password	Tap Forgot Password? to learn to reset your forgotten password.

Forgot Password

To reset your forgotten password, perform the following steps:

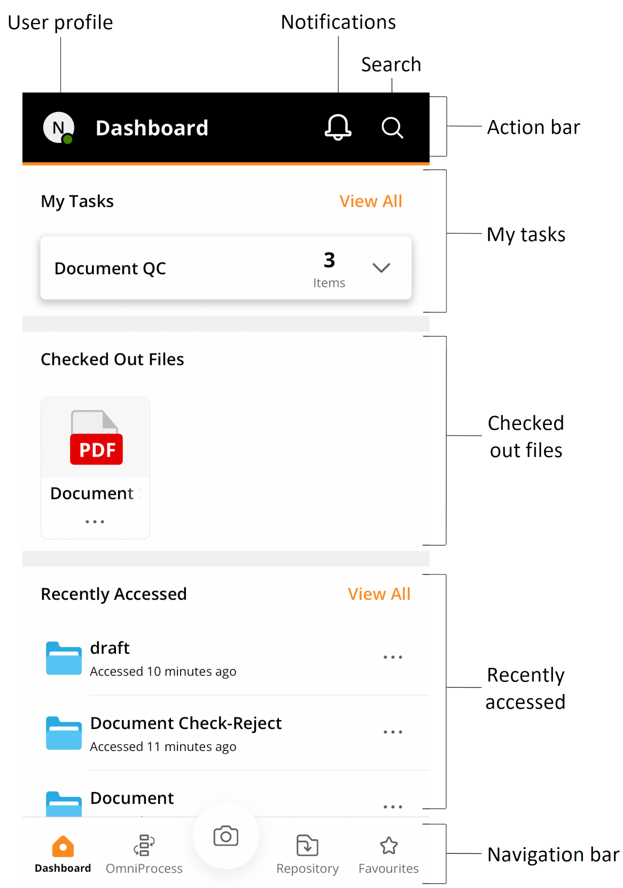
1. Tap the **Forgot password** button. The Forgot password screen appears.
2. Specify the following fields:

Option	Description
Username	Enter your username.
E mail	Enter the email ID used to create the account.
Cabinet Name	Choose the cabinet you are a member of.

3. Tap **Send Reset Link**.
   A reset link along with a set of instructions for resetting the password are sent on your registered email address.
4. Open the reset link. The Reset Password screen appears.
5. Enter the new password and re-enter to confirm.
6. Tap **Reset Password**.
   The password gets updated.

Getting familiar with home screen

On successful sign in, the home screen of NewgenONE OmniDocs mobile appears. By default, Dashboard is configured as the home screen.



Action bar — It allows you to perform the following operations:

- User profile — Manage your account and other settings such as:
    - Notifications
    - Checked Out Files
    - Alarms & Reminders
    - Offline Files
    - Trash

    - Settings
    - Help & Feedback
    - Logout
- Notifications — View alarms and reminders
- Search — Search for files and folders

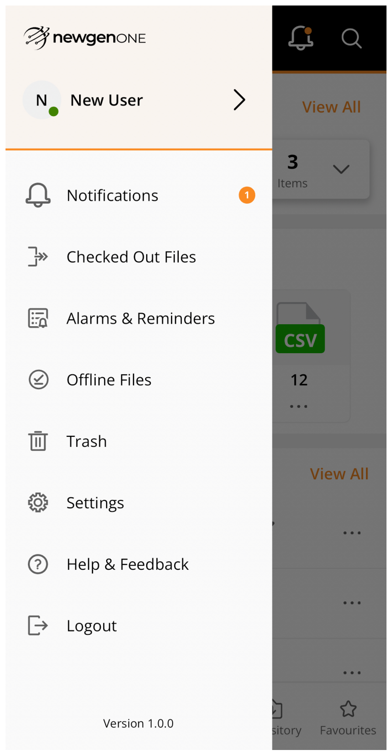
Dashboard — Appears by default when you sign in to NewgenONE OmniDocs Mobile.

Navigation bar — It provides access to the following main features of NewgenONE OmniDocs Mobile:

- Dashboard — The Dashboard provides a centralized view of key information and tasks for efficient monitoring and management.
- OmniProcess — OmniProcess streamlines document processing with configurable workflows and options for uploading, reviewing, and approving documents.
- Global Capture — Global Capture enables you to upload or capture new documents directly into the system for further processing and management.
- Repository — The Repository serves as a centralized storage for all documents, providing easy access and organization for efficient document management.
- Favourites — The Favourites feature allows you to mark and access frequently used documents or folders for quick retrieval.

User profile

The User Profile section provides a comprehensive menu to manage various aspects of your account and app settings.



On the upper left corner, tap the user profile icon. A side menu opens, presenting the following options:

- User Profile
- Notifications
- Checked Out Files
- Alarms & Reminders
- Offline Files
- Trash
- Settings
- Help & Feedback

- Logout

User Profile

Upon selecting **User Profile** from the side menu, you are directed to the User Profile screen, where you can view and edit your personal information. The screen displays the following details:

- First Name
- Last Name
- User ID
- Email
- Current Cabinet
- Last Login Time

Additionally, there is an Edit icon in the action bar at the top of the screen, allowing you to modify user profile. Tapping on the edit icon opens three editable fields:

- First Name — Allows you to change the first name.
- Last Name — Allows you to change the last name.
- Email ID — Allows you to change the email ID.

You can make changes to these fields and tap **Save** to update user profile information.

Notifications

The bell icon , appearing on the action bar in the right side, acts as a link to alarms and reminders notifications. It displays a list of alarms and reminders generated for you.

The alarm is set on a certain set of events and is viewed by the users who are involved with those events. The reminders are sent by those users whose requests have still not been processed by the signed-in user.

You can also access the Notifications and Alarms & Reminders sections from side menu within the User Profile section.

When there is any notification with respect to an alarm or reminder, the bell icon appears as , where the number denotes the total number of notification.

To view and delete notifications, perform the following steps:

1. Tap Notifications icon, notifications screen appears.
2. Tap:
    a. All tab to view alarm and reminders notifications simultaneously.
    b. Alarm tab to view alarm notifications
    c. Reminders tab to view reminders notifications.
3. Deleting notifications:
    a. Swipe left on the desired alarm or notification, clear button appears.
        i. Tap **Clear All**, given in upper-right corner of the screen, to delete all the notifications simultaneously.
    b. Tap the **Clear** button, a confirmation dialog appears.
    c. Tap **Clear** to confirm, or tap **Cancel** to abort.
    d. The deleted notifications are removed from the list.

Checking out and checking in files

This option is prominently displayed on the home screen for quick access and can also be accessed from the side menu within the User Profile section.

To Check out a file, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document.
2. Tap the **Check Out** option. A checkout prompt appears.
3. Select checkout to Device.

> Select the Download document checkbox if you want to download the document to your local drive to work offline.

4. Tap **Check out** to check out the document.

> You can undo check out by tapping **Undo Checkout** in the ellipsis menu.

To Checkin a file, perform the following steps:

1. Tap the ellipsis icon ••• against the checked-out document.
2. Tap the **Check In** option. The following options appear:
    a. Upload Photos — To upload photos from the device. For more information see the Upload photos section.
    b. Upload Documents — To upload documents from the device. For more information see the Upload documents section.
3. Select the file from the device, the Check In Details screen appears.

4. Select Checkin As :
    - **Major Version** — If the new version is selected as Major then it is marked as 1.0, 2.0, 3.0, and so on.
    - **Minor Version** — If the new version is selected as Minor then it is marked as 1.1, 1.2, 1.3, and so on.
5. Enter any comments or notes related to this version of the document.
6. Tap the **Checkin** to complete the document checkin.

Offline files

The Offline Files feature allows you to access and work on files even without an internet connection. This enhances productivity by ensuring continuous access to critical content regardless of network availability.

To save a document for offline access, perform the following steps:

1. Tap the ellipsis icon ••• against the required document.
2. Tap the **Save Offline** option. The document is saved in the Offline Files repository located in the User Profile section.

To remove a document from Offline files, perform the following steps:

1. Tap the ellipsis icon ••• against the required document in the Offline Files section.
2. Tap the **Remove from Offline** option. The file is deleted from the Offline Files repository and can't be accessed offline anymore.

Managing trash

Trash is a repository that contains deleted files and folders. You can review and manage deleted items before permanently removing them from the system. This ensures data safety and provides an opportunity to recover accidentally deleted content.

Following operations are available to perform on the deleted folders and documents:

- Move
- Properties
- Restore
- View Trash properties

- View Audit logs

Move

To move file or folder from trash, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document or file.
2. Tap the **Move** option. The repository screen appears, allowing you to choose the destination location for the document or folder.
3. In the bottom of the screen tap **Move** button to move the file or folder.

Properties

To view properties of a folder, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document or file.
2. Tap **Properties** option. The Folder Properties dialog box appears

Restore

To restore file or folder from the trash, perform the following steps:

1. Tap the ellipsis icon ••• against the desired file or folder.
2. Tap **Restore**. On the tap of Restore, a dialog box seeking your confirmation appears.
3. Tap **Restore** to restore the selected file or folder.

View Trash properties

To view trash properties, perform the following steps:

1. Tap the Properties icon displayed on the upper-right of the Trash Management screen. The Trash Properties dialog appears.

View Audit logs

Audit Log is an account of the operations that are performed on the specified object (cabinet, folder, or document) by any members of the cabinet.

To view audit logs, perform the following steps:

1. Tap Audit Log icon displayed on the top-right corner of the Trash Management screen. The Audit Log dialog appears.

2. Tap Download icon to download the audit log.

Settings

The Settings page allows you to customize your account preferences and security settings. This option is located in the User Profile section and enables you to perform the following operations.

- Change mPIN — Allows you to update your mobile personal identification number (mPIN) for added security.
- Change Password — Allows you to reset your sign in password.
- Privacy and Permission — Displays privacy and permission information.

To change the mPIN or password, perform the following steps:

1. Tap **Settings** in the User Profile section.
2. Select **Change mPIN**.
3. Enter the old mPIN and set a new one.
4. Re-enter the new mPIN to confirm.
5. Tap **Change** to save.

Similarly, you can reset your password.

Logout

Logout allows you to sign out of the NewgenONE OmniDocs Mobile app.

To logout, perform the following steps:

1. Tap the **Settings** option in the side menu within the User Profile section.
2. In the menu select the **Logout** option. A prompt appears.
3. Tap **Logout** to confirm logout.

   Select Clear mPIN and biometric from this device, if you want to clear the mPIN.

4. On successful logout, you are re-directed to the Login/Change Server screen.

Search

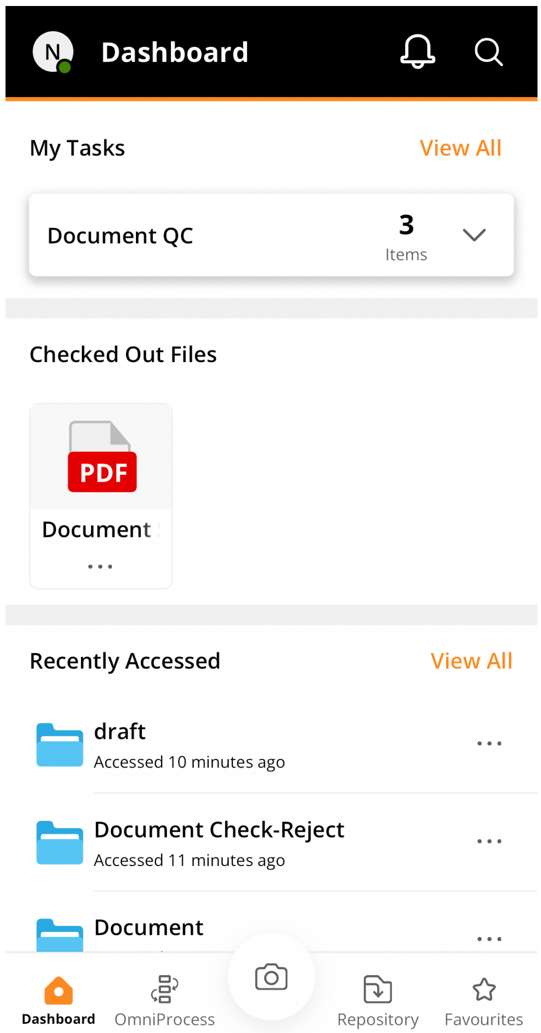
The Search feature allows you to perform advanced searches within the enterprise content, enabling quick access to specific documents, folders, and metadata. The Search feature streamlines information retrieval, helping you to locate and access relevant content with ease.

To utilize the Search functionality, perform the following steps:

1. Tap the Search icon on the Action bar.
2. Enter keywords or phrases related to the content.
3. Use filters or advanced search options to refine your search results.
4. Tap a search result to view the corresponding document or folder.

Viewing Dashboard

The Dashboard page serves as the home screen when you sign in to the NewgenONE OmniDocs Mobile app, offering a personalized overview of key activities and information.



The Dashboard page consist of the following sections:

- My Tasks
- Checked out Files
- Recently Accessed

Recently Accessed

The Recently Accessed section on the Dashboard showcases documents and folders that you have recently interacted with in OmniDocs. This feature provides quick access to frequently accessed content, eliminating the need for extensive searches and ensuring you can easily revisit important files.

Tap **View All**, to display all the recenelty accessed files.

My Tasks

The My Tasks option displays all pending tasks that require your action. These tasks are typically assigned by the administrator and are tasks that you need to complete or review. If you have been assigned as a checker for certain tasks, they will appear in this section.

To access My Tasks, perform the following steps:

1. Navigate to the Dashboard page in OmniDocs Mobile. My Tasks section is available at the top of the Dashboard.
2. The number of items pending in My Tasks is displayed.
3. To view all tasks, Tap the **View All** button within the My Tasks section.
   You can also tap the dropdown icon to view the tasks on the same page.
4. Upon tapping the View All button, a new page appears displaying a list of all your tasks that require action.

To take action on tasks, perform the following steps:

1. From the My Tasks page, you can take action on each task as required.
2. Tap the ellipsis icon ••• against the required task.
3. Two actions appear **Accept** or **Reject**. Use the provided options within each task entry to perform the necessary actions.

OmniProcess

OmniProcess is used in case of distributed scanning and centralized processing of files. These files consist of business object documents such as Credit Card Application, Insurance Policy, Loan Application and many other similar items.

When you open the OmniProcess page, the processes listed here are dynamically added from the administrator's settings, allowing you to access and select the relevant processes as per your organization's workflows and requirements.

Following are two primary aspects of OmniProcess:

Option	Description
Upload	The Upload section of OmniProcess allows you to upload documents and photos directly to the app for processing. It streamlines the document submission process and offers options for capturing photos or uploading existing documents. For procedure see Upload section.
Checker	Checker is the person responsible for reviewing the instrument submitted by the maker. After file is uploaded by the maker, it is scrutinized by the checker for quality issues. The checker task can be performed through OmniDocs Web as well as OmniDocs Mobile app.
Custom Process Name	This section represents custom processes created by you. These processes can be named and configured as per specific requirements. The ellipsis icon ⋯ for each custom process offers various options based on the configured settings. This may include actions such as Approval, Review, Verification, etc. For example: Document Check (Custom Process Name) In the Document Check section (Custom Process Name) of OmniProcess, documents have two primary options available within the ellipsis icon: • Accept: Selecting Accept moves the document to the designated folder within the processing queue, indicating that the document has passed quality control and is ready for further processing or approval.

Option	Description
	• Reject: Choosing Reject moves the document to another designated folder within the processing queue, signifying that the document did not meet quality standards or requires additional review or correction before processing.

- In OmniProcess, the process behavior is determined by the configuration set by the OmniDocs administrator.
- The actual process names and configurations within OmniProcess are determined by the organization and can vary based on user-created processes and the administrator's settings

Upload

The Upload section of OmniProcess streamlines the document submission process by allowing document and photo uploads directly to the app for processing. This section is essential for initiating document processing workflows efficiently.

To upload the photo or document, perform the following steps:

1. Tap the Create icon . The following options appears:
   a. Capture — Use this option to capture a new photo using your device's camera.
   b. Upload Photos — Choose this option to upload existing photos from your device for processing.
   c. Upload Documents — Select this option to upload existing documents from your device for processing.
2. After selecting the file, the Properties page appears with the following options:
   a. File Name — Enter the name of the document or photo being uploaded.
   b. Custom Fields — Shows the fields created by you to provide relevant information and additional details as needed for the document.
3. On the upper-right corner, tap the **Save** button to proceed with uploading the document or photo for processing within the OmniProcess workflow.

In the Upload section of the OmniProcess page, the document options depend on the process object selected during process configuration. The process shown here was configured by the administrator. You can edit the fields by tapping the edit icon .

Offline process

When the application operates in offline mode without an internet connection, the Offline process feature allows you to perform certain actions. This offline functionality enables you to continue working seamlessly even when disconnected from the network.

The Offline Process includes the following options:

- Create — Allows you to capture or upload files even without an internet connection. The files uploaded are labeled as "Offline Created Waiting for network".
- Submit — Allows you to submit documents by tapping the ellipsis icon •••, but these submissions are labeled as "Offline Submitted waiting for network" until an internet connection is restored.
- Edit — Allows you to edit the fields created during process configuration. Tap the edit icon to customize the fields.
- Delete — Allows you to remove the file.

Once connected to the internet, these submissions will be processed and synchronized with the server.

Global Capture

The Camera Icon , also known as Global Capture, is a key feature of the OmniDocs Mobile app. It empowers you to capture photos or documents using your device's camera directly within the app. This feature facilitates quick and convenient uploading of visual content to the OmniDocs repository, supporting the core functionality of document management on the go.

After capturing a file in Global Capture, you have the flexibility to choose any repository for placement, providing enhanced control over organizing your documents.

To capture a photo or document, perform the following steps:

1. Tap the camera icon to capture a photo. Ensure proper lighting and framing for clarity.
2. Point your mobile camera to the document and capture it by pressing the capture button.
3. After capturing, the photo is visible with following options at the bottom:
    a. Add — Allows you to capture another photo.
    b. Edit — Allows you to make changes to the captured photo. Tap **Edit** to access the following options:
        - Add — To capture another photo.
        - Crop — To crop the photo.
        - Filters — To put filters on the photo.
        - Rotate — To rotate the photo.
        - Retake — To capture again.
        - Delete — Removes the captured photo and opens the camera for recapture.
    c. Delete — Removes the captured photo and opens the camera for recapture.
4. Tap the **Next** button to proceed to the properties page.
5. The Properties page comprises of the following options:

Option	Description
File Name	Allows you to enter the file name.

Option	Description
Process Name	Allows you to select the process from the OmniProcess page.
Location	Allows you to select the repository for the captured image.
Upload To	The toggle button allows you to to switch between Omniprocess and Repository based on the selected process. • Selecting OmniProcess provides you with the fields created by you to provide relevant information and additional details as needed for the file. • Selecting Repository provides the following options to fill: ◦ Keywords ◦ Dataclass
⊕ Plus icon	Allows you to choose between capturing another photo or uploading existing ones.

6. Tap **Save** for Omniprocess or tap **Upload** for Repository to upload the captured photo or document.

Repository

OmniDocs Repository is the place where documents are organized in folders and subfolders hierarchy. Such a document archival mechanism offers a unified view of a content repository and also simplifies the document retrieval process. It allows multiple levels of access rights on folders and documents, leading to different repository views to different users.

1. Tap **Repository** in the navigation bar to access repository.
   The Repository screen appears. It displays a list of all the folders created in the root folder. It gives the following details about the listed folders.

Option	Description
Name	Name of the folder. By default, the folders are sorted in ascending order.
Modified Date	Last modified date of the folder.

2.
   - Only folders and documents on which you have read rights are visible to you. By default, you have read rights for all folders and documents. If a data class is associated to folders or documents, you need Read rights for that specific data class to view them.
   - By default, you don't have any rights for data classes. However, the admin can grant you View, Associate, De-Associate, and Modify field value rights for data classes. Additionally, the admin can specify rights for individual field values within data classes.

4. Tap any folder to open and view its contents. It is divided in two panes.

Option	Description
Folder Tab	It contains a list all the subfolders present in the opened folder. By default, the folders are sorted in ascending order. Refer Working with Folders.
Document Tab	It contains a list of all documents within the opened folder. By default, the documents are sorted in ascending order. Refer to Working with Documents.

A back arrow icon is available on the upper right corner of the screen. Upon long-pressing the back arrow icon, a list of breadcrumbs appears, showing the hierarchy of repositories and folders leading to your current location.

For example, if you are currently in the *Document Check* folder within the *Repository* section, the breadcrumbs will display: Repository > Document > Document Check.

Tap on any breadcrumb in the list to quickly navigate back to that specific location within the app.

Working with folders

The following operations can be performed on folders:

- Add Folder
- Delete Folder
- View and Modify Folder Properties
- Add to Favourites
- Alarms & Reminders
- Move or Copy
- Audit Log
- Filter

Add folder

A folder in your cabinet stores your document. You can add as many folders as you feel are essential for a complete logical classification of your documents.

To Add a Folder, perform the following steps:

1. On the upper right corner, tap the **Create New Folder** icon ⊞.
   Create New Folder dialog box appears. At this stage, you can add a Root Level folder.
2. Type a folder name to add.
3. Tap **Create** to create a new folder.
   The specified folders are added to the repository.
   - You can add multiple folders by repeating the above steps.

   You can create a folder and subfolders here by entering folder names, with each folder separated by a / (forward slash). For example: Folder 1/Folder 1.1/Folder 1.1.1.

To Add a Sub-Folder or Folders within a Folder, perform the following steps:

1. Tap the desired folder where you want to create a subfolder.
   The folder opens, displaying the following tabs:

Option	Description
Folder tab	Shows list of folders created within the opened folder.
Document tab	Shows list of all the documents uploaded within the opened folder.

2. For the remaining steps, follow the steps from 1 to 4 given for adding a folder.
   The added folder appears in the Folder tab.

Delete folder

Deleting a folder allows you to remove a folder and its contents from the OmniDocs repository. When you delete a parent folder, all its subfolders and documents also get deleted.

To Delete a Folder, perform the following steps:

1. Tap the ellipsis icon ••• against the desired folder.
2. Tap the **Delete** option. A dialog seeking your confirmation appears.
3. Tap **Delete** to remove the selected folder.

> You can delete a folder by swiping left on it and tapping **Delete**.

To delete multiple folders, perform the following steps:

1. Select the desired multiple folders by long pressing.
2. Tap the Delete icon on the action bar. A dialog seeking your confirmation appears.
3. Tap **Delete** to remove the selected folders.
4. On confirmation, the folders are deleted and removed from the repository.

> - To delete a subfolder, just open the parent folder and follow the above steps.
> - The deleted folders are moved to Trash.

Managing folder properties

Folder properties enable you to see details such as name, owner, number of documents and subfolders, and other metadata like data class.

If you have the rights to modify folder properties, you can change the folder's name, owner, description, and associate a data class with it.

To View Folder Properties, perform the following steps:

1. Tap the ellipsis icon ••• against the desired folder.
2. Tap the **Properties** option. A screen displaying the properties of the selected folder appears.

> Here, you can only view the folder properties.
> To see the properties of a subfolder, just open the parent folder and follow the above steps.

3. Swipe down to close the folder information screen.

To Edit Folder or Subfolder Properties, perform the following steps**:**

1. Open the properties of the folder you want to modify.
2. Tap the edit properties icon given at the upper-right corner of the screen. The Edit Properties dialog appears in an editable mode.
3. Modify the properties as required:
    a. Folder Name: Enter the new name in the Folder Name textbox.
    b. Owner: User name of the owner of the folder.
        i. Tap the **Owner**. Select Owner screen appears.
        ii. Choose a new owner of the folder. Select from User, Group, or Role as the new owner.

> The folder name can only be changed by the iys owner or Supervisor. By default, the creator of a folder becomes its owner.

- To select a User as the new owner:
    - Tap the desired User Group from the list of groups.
    - Tap **Done**.
    - Tap the desired User Name from the list of existing users.
    - Tap **Done**.
- To select a Group as the new owner:
    - Tap the Group tab.

        - Tap the desired Group Name from the list of existing groups.
        - Tap **Done**.
    - To select a Role as the new owner:
        - Tap the Role tab.
        - Tap the desired Role Group from the list of existing role groups.
        - Tap **Done**.
        - Select a Role and tap **Done**. The selected role appears as the owner's name.

c. Description: Specify the folder description as required.

d. Full Text Search: It allows you to enable or disable the full-text search feature on the folder.
    i. Tap **Enable** to enable FTS
    ii. Tap **Disable** to disable FTS

e. Data Class: Use this feature if all documents in a folder are of similar type. The Data Class dropdown contains all data classes created by the OmniDocs administrator.
   Enter or modify (for existing DataClass) the DataClass fields as required.

4. Tap **Save**, to apply the modified properties.

Adding to favourites

The add to Favourites feature allows you to add the frequently used folders and subfolders to your favourites. It acts as a shortcut for quick access to the folders or subfolders.

To add folders to favourites, perform the following steps:

1. Go to the repository screen for a root level folder or open the parent folder for a subfolder level.
2. Tap the ellipsis icon ••• against the desired folder.
3. Tap **Mark Favourite**.
4. The selected folder is now marked as favourites.

- A star icon appears against the folder.
- You can add a folder to your favourites by swiping right on the folder and tapping **Mark Favourite**.

5. A single or multiple folders can also be marked as favourites from the action bar. To do so:
   a. Select the desired folders.
   b. Tap the Favourites icon on the Action bar. The selected folders are marked as favourites.

Folders marked as favourites are also listed in the Favorites section for quick access.

To remove Folders from Favorites, perform the following steps:

1. Tap the ellipsis icon ••• against the desired folder.
2. Tap **Remove Favourite**.
3. The selected folder is now removed from favourites. You will notice that the star icon no longer appears next to the folder.

   You can remove a folder from favourites by swiping right on the folder and tapping **Remove Favourite**.

4. A single or multiple folders can also be removed from favourites from the action bar. To do so:
   a. Select the desired folders.
   b. Tap the unmarked favourite icon on the Action bar. The selected folders are removed from favourites.

The folders can also be unmarked from favourites by going to the Favourites list.

Folders removed from favourites are no longer shown in the Favorites list.

Alarms & Reminders

Alarm: An alarm is a notification that is flashed and e-mailed to the selected users on the occurrence of the specified event.
Reminder: A reminder is a notification that is flashed and e-mailed to all the selected users at a specified date and time.

To set alarms and reminders on a folder, perform the below steps:

1. Tap the ellipsis icon ••• against the folder you want to set an alarm or reminder.
2. Tap **Alarms & Reminders**. The new Alarms & Reminders screen appears.
3. Select Alarms or Reminders. The two options reflect the two different pages.

- **Alarm**: It allows you to view existing alarms and add new alarms.
- **Reminders**: It allows you to view existing reminders and add new reminders.

a. To add an alarm:
   i. On the upper-right corner tap ⊞ icon.
   ii. Specify the following details:

Field	Description
Select or type group	Select or type the group name.
Select or type user	Select or type the username. The users available in this dropdown list depend on the selected group.

Field	Description
When dropdown list	Select the events for user notification. The different types of events are: • **Document Deleted** — An alarm gets generated for the specified user when the document is deleted. • **Document Uploaded** — An alarm is generated for the specified user when a document uploads in this folder. • **Notes Added** — An alarm is generated for the specified user when a note is added to the document. • **Document Moved** — An alarm is generated for the specified user when the document moves to some other location. • **Document Renamed** — An alarm is generated for the specified user when the document is renamed. • **Document Shared** — An alarm is generated for the specified user when the document is shared with other users. • **Document Checked Out** — An alarm is generated for the specified user when the document checks out. • **Document Checked In** — An alarm is generated for the specified user when the document checks in. • **Folder Added** — When a subfolder is added to this folder, an alarm is generated for the specified user. • **Folder Moved** — When this folder moves, an alarm is generated for the specified user. • **Folder Deleted** — When this folder deletes, an alarm is generated for the specified user. • **Folder Renamed** — When this folder is renamed, an alarm is generated for the specified user. • **Folder Shared** — When this folder is shared, an alarm is generated for the specified user.

iii. Tap **Add** to set the alarm. The added alarm appears in the Selected Alarms section.

Repeat the above steps to add more alarms.

b. To add a reminder:
   i. On the upper right corner tap the icon.
   ii. Specify the following details:

Field	Description
Select or type group	Select or type the group name.
Select or type the user	Select or type the username. The users available in this dropdown list depend on the selected group.
On	Select the date to activate the reminder.
At	Specify the time for activating the reminder on the selected date.
Comments	Type a brief description of the reminder.

   iii. Tap **Add** to add the reminder. The added reminder appears in the Selected Reminders section.

Audit Log

The Audit Log feature provides a comprehensive record of all activities and changes made to folders, documents, and user actions within the application. It serves as a valuable tool for tracking and monitoring activity history, including folder creation, document copying, user creation, and other relevant events.

To View the Audit Log of a Folder, perform the following steps:

1. Tap the ellipsis icon • • • against the desired folder.
2. Tap **Audit Log**. A screen displaying the audit log of the selected folder will appear, providing detailed information about the activities and changes associated with the folder.
3. On the upper right corner tap the download icon to download the audit log. The audit log of the selected folder gets downloaded in *XLS* format.

Managing documents

The NewgenONE OmniDocs Mobile app offers the following document management operations:

- View Document
- View and Modify Document Properties
- Adding Notes
- Add Document
- Download Document
- Delete Document
- Add to Favourites
- Sharing
- Version History
- Move or Copy
- Filter
- Save Offline
- Alarms & Reminders
- Check Out and Checkin

Viewing document

This section describes the process of viewing both image and non-image documents.

Image Document:

To view an image document of any folder, perform the following steps:

1. Open the required folder.
2. Tap the required image document. The selected image document appears, showing the following options:
   - Notes icon — The Notes icon allows you to view existing notes and add a new note for further correspondence. Refer Adding Notes section for more details.
   - Ellipsis icon •••, given at the top-right corner of the screen, allows you to view properties, mark as favourite, download, and other options for the opened document.

Non-Image Document:

The non-image document opens in its native application, requiring the smartphone to have the corresponding application installed. For example, to open a .doc file, the Microsoft Word application must be installed on your smartphone.

To view a non-image document of any folder, perform the following steps:

1. Open the required folder.
2. Tap the required non-image document (here were opening a doc file). An icon of the selected non-image document appears in the View tab, showing the following options:
    a. Notes icon — The Notes icon allows you to view existing notes and add a new note for further correspondence. Refer Adding Notes section for more details.
    b. Ellipsis icon •••, given at the top-right corner of the screen, allows you to view properties, mark as favourite, download, and other options for the opened document.
3. As the MS Word file cannot be opened here, you are required to download it to view this document.
4. Tap **Open** to download the document to your smartphone's local drive. You can access this downloaded document from the Downloads section.

Media File Viewer:

Media File Viewer is used to play audio and Video files uploaded in the OmniDocs repository.

To play such files, perform the following steps:

1. Tap the required media (audio or video) file.
2. The file opens in media file viewer.
3. Tap the Play button to play it.

The functionalities of the Properties and Notes tabs are the same as those of image and non-image documents, respectively.

To Viewing Multi-pages Documents, perform the following steps:

In case the opened document contains multiple pages, then a scroll bar appears at the bottom of the page.

- To go to the next page, slide the scroll bar towards right or swipe the page from right to left.
- To go to the previous page, slide the scroll bar towards left or swipe the page from left to right.

Viewing document properties

Document properties display various information about a document, including its name, owner, modification date, as well as metadata such as keywords and data class.

If you have the right to modify document properties, then you can modify the document name, owner, description, add or remove keywords, and associate or disassociate a data class.

To View Document Properties, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document.
2. Tap **Properties.**

   The Properties dialog box appears, showing the properties of the selected document in a read-only mode.

3. Swipe downward to close the Properties screen.

To Edit document properties, perform the following steps:

1. Open the document properties for modification.
2. Tap the edit properties icon given at the upper-right corner of the screen. Edit Properties of the selected document appears.
3. Modify the properties as required:
   a. File Name: Enter the new name in the File Name textbox.
   b. Owner: User name of the owner of the document.
      i. Tap **Owner** textbox. Select Owner screen appears.
      ii. Choose a new owner of the document. Select from User, Group or Role as the new owner.

         - The name of the document can only be changed by its Owner or the Supervisor.

        - To select a User as the new owner:
            - Tap the desired User Group from the list of group. Tap **Done**.
            - Tap the desired User Name from the list of existing users.
            - Tap **Done**.
        - To select a Group as the new owner:
            - Tap Group tab.
            - Tap the desired Group Name from the list of existing groups.
            - Tap **Done**.
        - To select a Role as the new owner:
            - Tap Role tab.
            - Tap the desired Role Group from the list of existing role group. Tap **Done**.
            - Select a Role that you want to assign to the selected group and tap **Done**. The selected role appears as the owner name.
    c. Description: Specify the document description as required.
    d. Add Keywords: If any keyword is already associated with the document, then it is shown in Keywords box. For more information, see the keywords section.
    e. Data Class: Use this feature if all documents in a folder are of a similar type. For more details. see Dataclass section.
4. Tap **Save**, to save the modified properties.

Adding notes

Notes feature allows you to communicate with other reviewers in the form of messages. You can add new notes to a document for further correspondence.

To add a new note, perform the following steps:

1. Open the required document.
2. Tap the Notes icon . The existing comments, if any, are displayed.
3. Type your notes in the Post a note textbox and tap the send icon to add the note..
4. The note added by you appears just above the existing notes. In addition to the note, the time of the post and the name of the user who posted it are also displayed.

Adding document

Adding documents allows you to seamlessly upload new files to your desired folder or subfolder.

To add documents in a folder or a sub-folder, perform the following steps:

1. Open the required folder or sub-folder.
2. Tap the Add icon ⊞, given at the upper-right corner of the screen. The following options appear:
    - New Folder
    - Capture
    - Upload Photos
    - Upload Document

Uploading Photos

To upload photos, perform the following steps:

1. Tap **Upload Photos**, **and** a screen showing recently accessed photos appears. You can change the folder as required.
2. Tap the desired photo to select it.
3. On the upper-right corner, tap the **open** button, the properties page appears, showing the following options:

Option	Description
File Name	Allows you to enter the file name in the provided text box.
Location	Allows you to select the repository for the selected image.
Keywords	Allows you to add keywords in the image. For For more details, see Keywords section.
Dataclass	Allows you to select a data class for the image. For more details, see Dataclass section.
⊕ Plus icon	Allows you to choose between capturing another photo or uploading existing ones.

4. On the upper-right corner tap **Upload** to upload the selected photo.

Uploading Documents

To upload documents, perform the following steps:

1. Tap **Upload Documents**, and a screen showing a recently accessed document appears. You can change the folder as required.
2. Tap the desired document to select it.
3. On the upper-right corner tap the **open** button, and the properties page appears, showing the following options:
4.

Option	Description
File Name	Allows you to enter the document name.
Location	Allows you to select the repository for the selected document.
Keywords	Allows you to add keywords in the document. For more details, see Keywords section.
Dataclass	Allows you to select a data class for the document. For more details, see Dataclass section.
Plus icon	Allows you to upload another document.

5. On the upper-right corner, tap **Upload** to upload the selected document.

Adding keywords

To add keywords at the time of uploading photos or documents, perform the following steps:

1. Tap the edit icon , Manage keywords screen appears.
2. Select a Keyword from the list or enter one in the Add combo box.
3. As you select a keyword, it gets added as a patch just above the keywords list.
4. To define and add a new keyword here itself, type the desired keyword text and tap **ADD**.
5. Tap **Save** to add the selected keywords to the photo or document.

Adding data class

Use this feature if all documents in a folder are of a similar type. The Data Class dropdown list contains all the data classes that are created in OmniDocs Administrator.

- Select the desired data class from the dropdown list. The data class fields are displayed for data entry.
    - Changing Data Class dialog box appears if a data class is already associated.
    - Tap **Confirm** to validate the selection. The data class fields appear for data entry.
- b. Enter or modify (for existing data class) the data class fields as required.

> The validations set for Dataclass and Global Index fields through the admin module will work as it is in the OmniDocs mobile as well.

Downloading document

The download feature allows you to save copies of the documents to your smartphone's local drive. Downloaded documents are saved in a default folder named OmniDocs, which is created upon downloading your first document.

To download a single document, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document.
2. Tap **Download**. The selected document is downloaded to your mobile.

To download multiple documents, perform the following steps:

1. Select the desired multiple documents by long-pressing each.
2. Tap the ellipsis icon ••• on the upper-right corner of the screen.
3. Tap **Download**. The selected documents are downloaded to your smartphone.

Deleting document

You can delete the saved documents from any folder or sub-folder repository.

To delete a single document, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document.
2. Tap **Delete**, dialog seeking your confirmation appears.
3. Tap **Delete** to remove the selected document.

To delete multiple documents, perform the following steps:

1. Select the desired multiple documents by long-pressing each.
2. Tap the Delete icon on the action bar, dialog seeking your confirmation appears.
3. Tap **Delete** to remove the selected documents.

The deleted documents are removed from the document list and moved to Trash.

Adding to favourites

The add to Favourites feature allows you to add the frequently used documents to your favourites. It acts as a shortcut for quick access to the documents.

To add document to Favourites, perform the following steps:

1. Open the Document tab of the required document.
2. Tap the ellipsis icon ••• against the desired document.
3. Tap **Mark Favourite**.
4. The selected document is now marked as favourites.

- A star icon appears against the document.
- You can add a document to favourites by swiping right on the doucment and tapping **Mark Favourite**.

5. A single or multiple document can also be marked as favourites from the action bar. To do so:
   a. Select the desired documents.
   b. Tap the Favourites icon on the Action bar. The selected documents are marked as favourites.

All those documents which are marked as favourites also appear in Favourites list for quick access.

To remove document from Favourites, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document.
2. Tap **Remove Favourite**.

3. The selected document is now removed from favourites. Notice that the star icon disappears against the document.

> You can remove a document from favourites by swiping right on the doucment and tapping **Remove Favourite**.

4. A single or multiple document can also be removed from favourites from the action bar. To do so:
   a. Select the desired documents.
   b. Tap unmarked favourite icon on the Action bar. The selected document are removed from favourites.

The documents can also be unmarked from favourites by going to Favourites list.

> The documents which are removed from favourites will no longer be available in Favourites list.

Alarms & Reminders

Alarm: An alarm is a notification that is flashed and e-mailed to the selected users on the occurrence of the specified event.
Reminder: A reminder is a notification that is flashed and e-mailed to all the selected users at a specified date and time.

To set alarms and reminders, perform the below steps:

1. Tap the ellipsis icon ••• against the required document.
2. Tap **Alarms & Reminders**. The new Alarms & Reminders screen appears.
3. Select Alarms or Reminders. The two options reflect the two different pages.
   - **Alarm**: It allows you to view existing alarms and add new alarms.
   - **Reminders**: It allows you to view existing reminders and add new reminders.

a. To add an alarm:
   i. On the upper-right corner tap icon.
   ii. Specify the following details:

Fields	Description
Select or type group	Select or type the Group name

Fields	Description
Select or type user	Select or type the User name. The availability of the users in this dropdown list depends on the selected group.
When dropdown list	Select the event on which the user will be notified. The different types of events are: • **Document Deleted**: An alarm gets generated for the specified user when the document is deleted. • **Document Uploaded**: An alarm is generated for the specified user when a document uploads in this folder. • **Notes Added**: An alarm is generated for the specified user when a note is added to the document. • **Document Moved**: An alarm is generated for the specified user when the document moves to some other location. • **Document Renamed**: An alarm is generated for the specified user when the document is renamed. • **Document Shared**: An alarm is generated for the specified user when the document is shared with other users. • **Document Checked Out**: An alarm is generated for the specified user when the document checks out. • **Document Checked In**: An alarm is generated for the specified user when the document checks in.

iii. Tap **Add** to set the alarm. The added alarm appears in the Selected Alarms section.

Repeat the above steps to add more alarms.

b. To add a reminder:

i. On the upper right corner tap the icon.

ii. Specify the following details:

Option	Description
Select or type group	Select or type the Group name.
Select or type the user	Select or type the User name. The availability of users in this dropdown list depends on the selected group.
On	Select the date on which the reminder gets activated.
At	Specify the time of the selected date at which the reminder gets activated.
Comments	Type a brief description of the reminder.

iii. Tap **Add** to add the reminder. The added reminder appears in the Selected Reminders section.

Sharing document

Sharing allows you to share documents through various channels like email, Bluetooth, storage drives, social media, and other similar platforms.

To share documents, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document. You can select multiple documents as well by long-pressing each one.
2. Tap **Share**.
3. The following options appears:
   - **As Attachment** — To share the selected documents as attachments.

     You can share a document by swiping left on the folder and tap **Share** to share as attachment.
   - **As Link** — To share the link of the selected documents. You can set the link's expiry time in days, with a maximum limit of 30 days. Additionally, you can set a passcode to secure the document.
   - **Within OmniDocs** — To share the selected documents within OmniDocs. For procedural steps see Within OmniDocs section.
4. Tap **Share**.
5. Select an app to share.
6. The documents are shared via the selected app.

The document recipients must perform the following actions:

1. If the documents are forwarded as attachments:
   a. Open your mail inbox or the app through which documents were shared.
   b. Save the attached documents.
2. If the documents are forwarded in links:
   a. Open your mail inbox or the app through which links to the documents were shared.
   b. Tap the Document link.
      - If there are multiple documents, then Document link appears against each document.
   c. The OmniDocs login page appears.
   d. Sign in to OmniDocs using your username and password.

Within OmniDocs

To share the document within OmniDocs, perform the following steps:

1. Tap **Within OmniDocs**, the share within OmniDocs screen appears. The screen comprises the following options:

Option	Description
To	Enter the recipient's email address or select from your contacts to whom you want to send the document.
Add cc/bcc	Optionally, add carbon copy (cc) or blind carbon copy (bcc) recipients for the email.
Subject	Enter the subject of the email that will be sent along with the document.
Send_as	Choose whether to send the document as an attachment or as a link within the email.
Message	Add a message or note to accompany the shared document.

2. On the upper right corner tap **Share**.

Viewing document version history

The Version History feature allows you to track and manage different versions of documents, providing a history of changes and revisions made over time. For procedural details, see add document section.

To fetch the document version details, perform the following steps:

1. Tap the ellipsis icon ••• next to the desired document.
2. Select **Version History** from the menu.
3. The version history of the document appears.
4. Within the Version History, previous versions may have the ellipsis icon •••, offering additional options for managing document versions. Options available in Version History:

Option	Description
Set as Latest	Use this option to set a specific version of the document as the latest version, replacing the current version with the selected one.
Add/Edit Comment	Selecting this option allow you to add or edit comments associated with a particular version of the document, providing context and information about the changes made.
Delete	The Delete option allow you to remove a specific version of the document from the version history, helping to declutter and manage the version history effectively.
Create Baseline	Allows you to select Major Version or Minor Version for the document. Additionally, you can enter any comments or notes related to the version of the document.

Move or Copy

The Move or Copy feature allows you to efficiently manage your files and folders by relocating or duplicating them.

To move or copy the files or folder, perform the following steps:

1. Tap the ellipsis icon ••• against the desired document or file.
2. Select **Move or Copy**. The repository screen appears, allowing you to choose the destination location for the document or folder. At the bottom of the screen, the following options are available:

Option	Description
Create Folder	Create a new folder at the selected location. For more details, see Add folder section.
Move	Relocates the selected document or folder to a new location within the repository. It removes the item from its current location and places it in the specified destination folder.
Copy	Duplicates the selected document or folder. The duplicate copy remains in the current location while also being copied to the chosen destination.
Undo	The confirmation message of copy or move includes an UNDO button on the right side. This UNDO feature allows you to revert the move or copy action if needed, providing an added layer of flexibility and control over file management operations.

Filter

The Filter feature allows you to refine the list of folders and files based on specific criteria, enhancing organization and navigation. The Filter feature comprises:

- Apply Filter
- Sort By
- View As

Apply Filter

1. Tap Filter icon ▽. The Filters screen appears. The file and folders can be filtered on the basis of one or all of the following criteria:

Option	Description
Name	Name of the file or folder.
Modified Date	Filter files or folders based on modification date with options such as anytime, last 7 days, last 30 days, specific years, and custom date range.
Created Date	Filter files or folders based on creation date with options such as anytime, last 7 days, last 30 days, specific years, and custom date range.
Owner	Owner name of the file or folder.
Data Class	Name of the data class associated with the file or folder.

You can also type wild cards instead of an entire file or folder name.
For example, if you want to search for the folder, named -"Advertisement" then you can type a wild card such as Adver* instead of an entire folder name.

2. Specify the filter criteria and tap **Apply**.
   - The **Reset** button allows you to clear the specified filter criteria..

A list of files or folders is displayed based on specified filter criteria.

- If you have typed a wild card instead of the entire file or folder name, then a list of files or folders matching the wild card entry is shown.

Sort By

Sort By allows you to sort the file or folder list by Name and Modified On. By default, the items are sorted by Name in ascending order.

To sort the files or folders, perform the following steps :

1. Tap Sort By icon . The Sort On dialog appears.
   a. To sort folders by name or modified on, or modification date, choose from the following options:

Option	Description
Name (Z-A)	To sort folders in descending alphabetical order.
Name (A-Z)	To sort folders in ascending alphabetical order.

Option	Description
Latest Modified Date	To sort folders based on the most recent modification date.
Oldest Modified Date	To sort folders based on the earliest modification date.

b. To sort files by name or modified on, modification date, or size, choose from the following options:

Option	Description
Folder First	To sort folders before files in the list.
File First	To sort files before folders in the list.
Largest Size	To sort files based on size, with the largest files listed first.
Smallest Size	To sort files based on size, with the smallest files listed first.
Name (Z-A)	To sort files in descending alphabetical order.
Name (A-Z)	To sort files in ascending alphabetical order.
Latest Modified Date	To sort files based on the most recent modification date.
Oldest Modified Date	To sort files based on the earliest modification date.

View As

Customize your file or folder view with options like List, Compact List, Grid, or Compact Grid for optimized display.

To customize the files or folders view, perform the following steps:

1. Tap (View As) icon. The View As dialog appears with the following options:

Option	Description
List	To view files or folders in a list format.
Compact List	To view a compact list.
Grid	To view files or folders in a grid layout.
Compact Grid	To view a compact grid .

Managing favourites files and folders

Favourites contain all the folders or subfolders and documents marked as favourites.

To view Favourites section, tap the Favourites shortcut given in the navigation bar.

The Favourites screen appears. It displays a list of all the folders and documents which are marked as favourites. The list is sorted alphabetically.

Working with folders:

Tap the desired folder to open and work with it. For more details see Working with Folders.

Working with documents:

Tap the desired document to open and work with it. For more details see Working with Documents.

Miscellaneous

No internet

When the app detects no internet connection, it opens the OmniProcess page with limited functionality. Only the following sections are available:

- **Upload —** In the OmniProcess page, only the Upload section is accessible. You can submit documents by tapping on the Upload section, but these submissions are labeled as "Offline Submitted waiting for network" until an internet connection is restored. For more information see the Offline process section.
- **User Profile** — Within the User Profile section, you have access to:
  - Offline Files: You can access and manage files that are saved offline.
  - Settings: Access app settings for customization and configuration.
  - Logout: Option to sign out of the app.

App server Not running

When you try to access the app when the application server is in stop mode, an alert message “App Server is not running” appears at the bottom of the screen. This message also appears in case you are in the middle of any task and suddenly the application server has stopped. In this case, wait for the server to re-start and then try again.

If you try to connect to a stopped application server through Change Server, an alert message “Error in fetching cabinet list. Please check the server details” appears at the bottom of the screen.

Session expired

You are prompted to Sign in again in case your current session has expired. The session gets expires in the following cases:

- The same user has already logged in, on some other machine.
- User sign in session timeout if inactive for a specified period of time. This timeout period is set by the OmniDocs administrator.

If your session has expired, perform the following steps:

1. To re-login, tap **Continue**.
2. You are re-directed to the Login/Change Server screen.