



## GETTING STARTED FOR ADMINISTRATORS

YOUR GUIDE TO OBJECTIVE CONNECT

**FOR OBJECTIVE ECM**





## Secure external collaboration.

### Key Features

- Secure, Private Workspaces
  - Collaborate on Documents
  - Capture Conversations
  - Control Tasks
- Government Grade Security
- Seamless user, permission and document integration your EDRMS

### About Objective Connect

Objective Connect creates a secure, private Workspaces so you can work with anyone, even when they are outside your firewall. Objective Connect is the secure and efficient way to work with partners on projects, manage your outsourced service-providers or collaborate with any external party.

With Objective Connect you can manage almost any business process. Remove the need for paper, email, thumb drives, DVD's or shadow IT and increase visibility by ensuring all of the latest information is stored in a single, secure Workspace.

With government-grade security, you can collaborate on documents, capture conversations and control tasks in one secure location.

Objective Connect can also be integrated to your Electronic Document Records Management System (EDRMS) to ensure you always maintain single source of truth.

### About This Guide

The following guide is designed to enable you to get started as an **Objective Connect Administrator** when it is **integrated with Objective ECM**.

If you are new to Objective Connect, we recommend you also review the Workgroup Members Guide ([here](#)). The **Workspace Owners Guide - for Objective ECM Guide** will provide information on basic navigation, managing documents, capturing conversations, controlling tasks and inviting additional participants to join a secure Workspace.

If need further assistance please go to the Objective Connect Help Centre at [help.objectiveconnect.com](http://help.objectiveconnect.com)

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# 1. KEY CONCEPTS

# Workgroups

Each Objective Connect subscription comes with at least one Workgroup. Team members that require the ability to collaborate with internal and external parties are added to the Workgroup. Once added, the team member can create secure, private workspaces where they can collaborate on documents, capture conversations and control tasks. All team members who have been added to the Workgroup have one of the following roles:

- **Members:** Can create and manage their own Workspaces.
- **Administrators:** Can also add or disable Members, manage connection consumption, transfer ownership of Workspaces and produce audit trail reports.

**Note:** If an organisation has an Enterprise Objective Connect subscription, it enables them to have separate Workgroups for individual departments or business units with differing collaboration needs.

# Workspaces

When a Member creates a Workspace, they are known as a **Workspace Owner**.

Anyone who is invited to collaborate on content within a Workspace is simply known as a **Participant**. The actions that a Participant can perform is assigned per Workspace that they are invited to.



# Connections

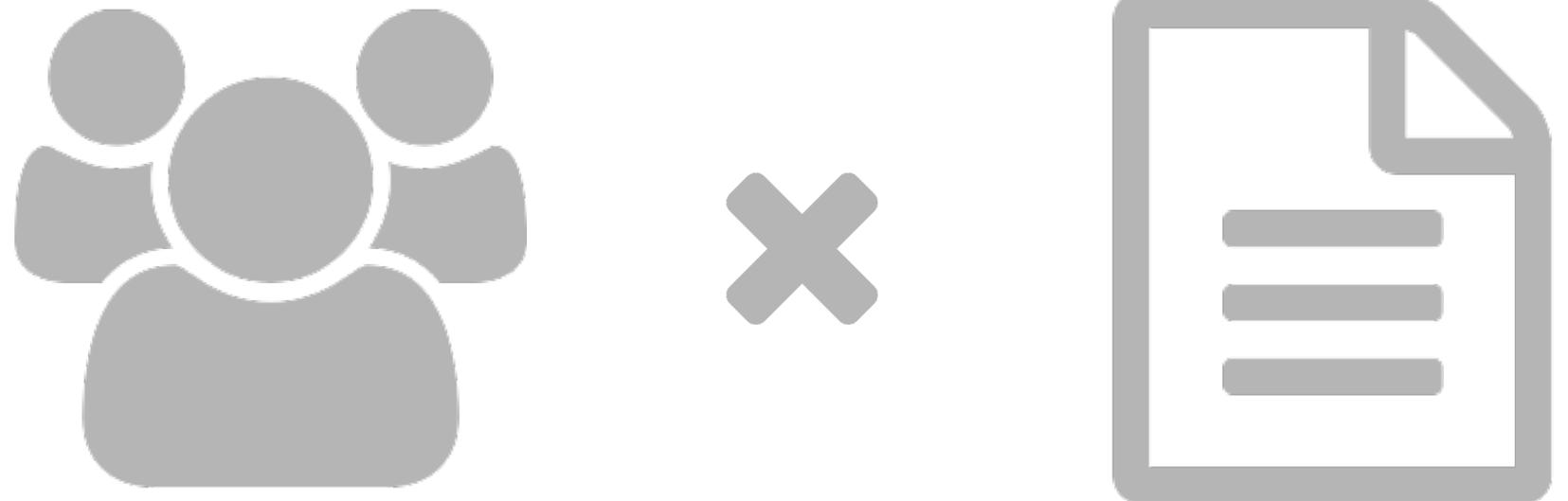
Connections are the **unit of currency** within Objective Connect. Connections are calculated according to the number of documents uploaded to each Workspace and the number of parties (Workspace Owners and Participants) who are able to see them.

- Documents x Parties = Connections

When an organisation subscribes to Objective Connect, the **edition denotes the number of Connections available** in the Workgroup.

- 1 Document x 2 Parties = 2 Connections
- 10 Document x 2 Parties = 20 Connections
- 1 Document x 20 Parties = 20 Connections

**Connections can be recycled** by either removing participants from a Workspace, by deleting documents or ending a Workspace.



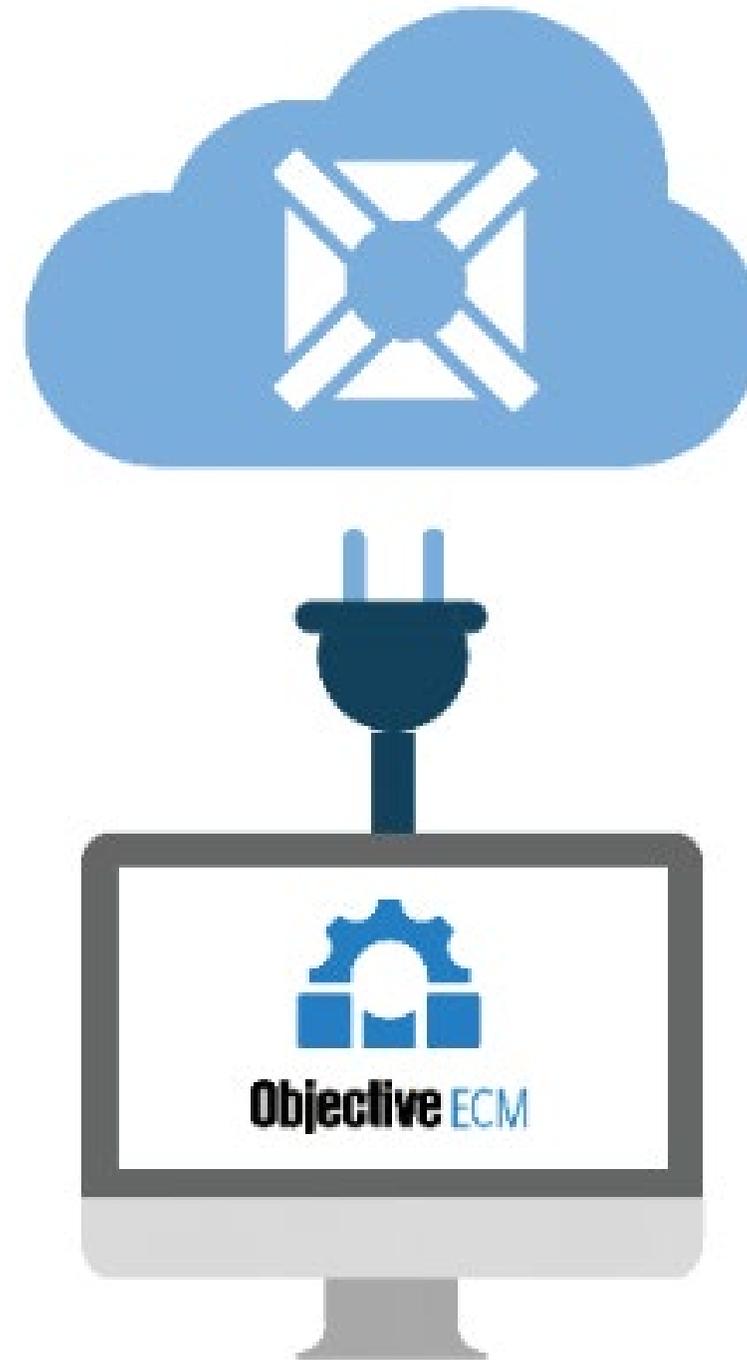
# Connect Link

Objective Connect can be seamlessly integrated with Objective ECM. This **integration is known as Connect Link**. This integration ensures that Objective ECM remains the single-source-of-truth, even when working with external parties.

With a simple right-click from within Objective ECM, the content of a folder or file is **automatically synchronised** with an Objective Connect Workspace.

Before a document is shared externally the permission and life-cycle information within Objective ECM is always checked, ensuring **restricted information never leaves** your organisation.

Every document uploaded and every document version updated in Objective Connect is automatically synchronised with the folder or file in Objective ECM, with a complete record **updated** in the **Objective ECM audit trail**. Similarly, any document added to the Objective ECM folder is automatically synchronised with the Objective Connect Workspace.



## 2. SET UP

# Getting Started

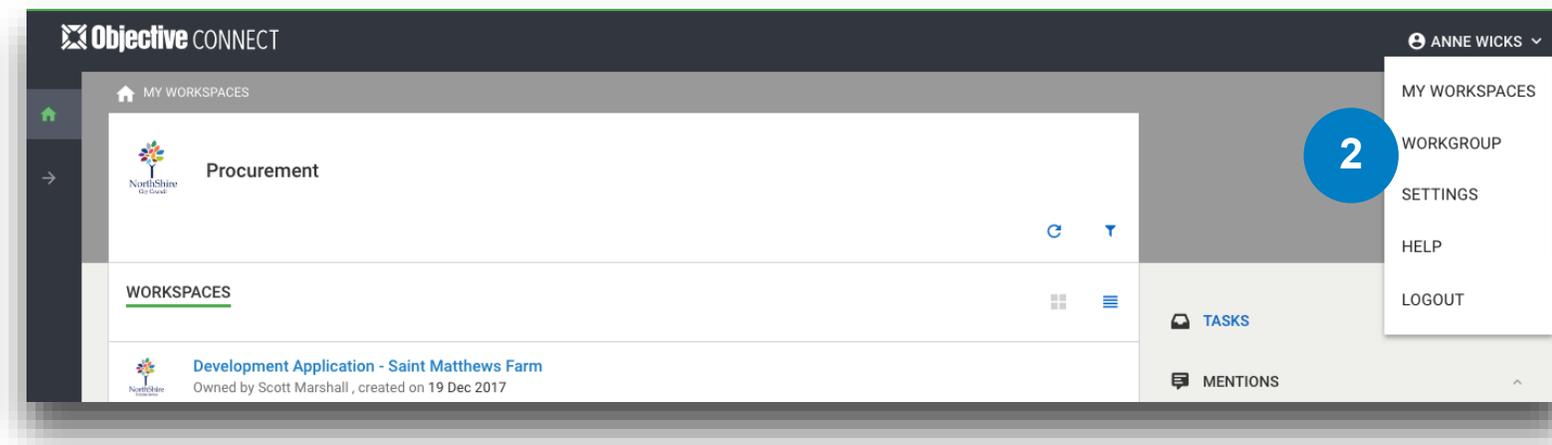
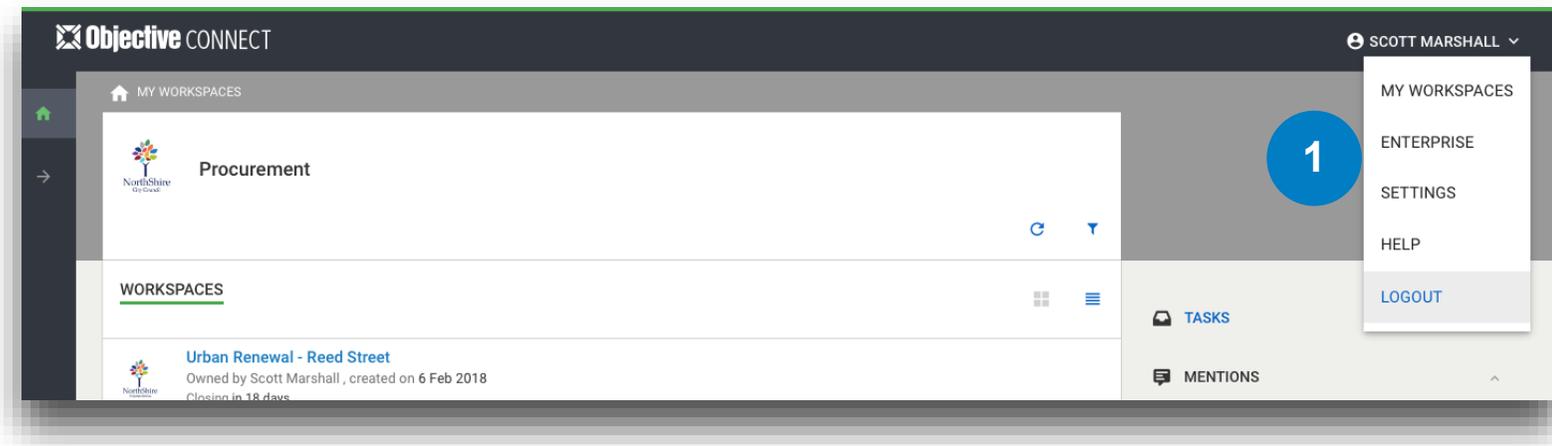
As an Objective Connect Administrator you have additional permissions that enable you to manage your Objective Connect Workgroup. These additional permissions allow you to:

- View **Contract Edition** and Expiry Date.
- Add your organisation's logo.
- **Invite** and disable Workgroup **members**.
- View **Connection consumption** by Member or by Workspace.
- View Workgroup member details, including the specific Workspaces that have been created and the number of Connections Consumed.
- Produce **audit trails** based on workgroup events.
- **Transfer ownership** of Workspaces.

All of the information and functions listed above, are accessed via the user menu.

1. If you are an Enterprise Admin, **Enterprise** menu is located under your user name in the top right corner of the page.
2. If you are an Workgroup Admin, **Workgroup** menu is located under your user name in the top right corner of the page.

If you do not have Administrator permissions, these menus will not be visible.



# Workgroup Set Up

The Workgroup page provides Administrators information regarding their Objective Connect Contract, including:

1. Workgroup Name, which can be edited using the Pencil icon.
2. Workgroup edition.
3. Workgroup Expiry Date. An Objective Connect contract is subscribed to via an annual contract. The Expiry Date denotes when the contract needs to be renewed.
4. The number of Members within the Workgroup.
5. The number of **Connections consumed** by the Workgroup.
6. The number Connections consumed, shown as a % of the Contract Allocation.

The screenshot shows the workgroup setup page for 'North Shire Council'. It features a header with the council name and an edit icon (1). Below the header is a table with the following details:

<b>Edition:</b>	Enterprise CL Demo + Multi Workgroup + Support
<b>Expires:</b>	14th March 2018
<b>Members:</b>	0
<b>Connections:</b>	0 / 500000

Below the table is a progress bar showing 0% consumption (6). To the left of the table is a logo placeholder with a '+Add' button (7). A vertical stack of callouts (2, 3, 4, 5) points to the Edition, Expires, Members, and Connections rows respectively.

Within this page, an Administrator can upload their organisation's logo. This logo is then displayed on all Workspaces created within the Workgroup and is visible to external participants

7. To **upload a logo**, click **+Add**.

# 3. MANAGING WORKGROUPS

# Adding Workgroups

Objective Connect supports multiple Workgroups for organisations with an Enterprise subscription. This enables organisations to have **separate Workgroups for individual departments or business units** with differing collaboration needs. As each Workgroup has their own unique set of Administrators and Members, it provides an assurance that differing forms of collaboration are segregated from each other and provides complete control over who can participate in differing collaborative spaces.

Each Workgroup shares from a **combined pool of Connections**. The 'real-time' dashboard view of all Workgroups ensures the IT Team retains control and provides a simple view of each department's consumption, allowing for simplified cross-charging.

Along with unique branding, each Workgroup can also have **individual integration**. For example, one Workgroup can be integrated with Objective ECM and another be integrated to HPE Content Manager or Microsoft SharePoint. Alternatively, whilst one or more Workgroups are integrated, additional Workgroups can also run standalone.

1. To create a new Workgroup, an Enterprise Administrator needs to simply click **Create New Workgroup**. If integration is required for the new Workgroup, please contact the [Objective Connect Team](#)

The screenshot displays the Objective Connect interface for an Enterprise user (SCOTT MARSHALL). The main view is for the 'North Shire Council' workgroup, showing a 'Connections used' bar at 0%. Below this, a summary row indicates: Edition: Enterprise CL Demo + Multi Workgroup + Support, Expires: 14th March 2018, Members: 14, and Connections: 423 / 500000. A 'WORKGROUPS' section is visible, featuring a 'Create Workgroup' button (marked with a '1' in a blue circle) and a grid of six workgroup cards. Each card shows the workgroup name, member count, connection usage, and a 0% progress bar.

Workgroup Name	Members	Connections
North Shire Council	2	203 / 500000
Planning and Development	3	4 / 500000
Legal	1	0 / 500000
Procurement	4	68 / 500000
North Shire Councillors	1	13 / 500000
Corporate Services	3	135 / 500000

# Enabling and disabling annotations

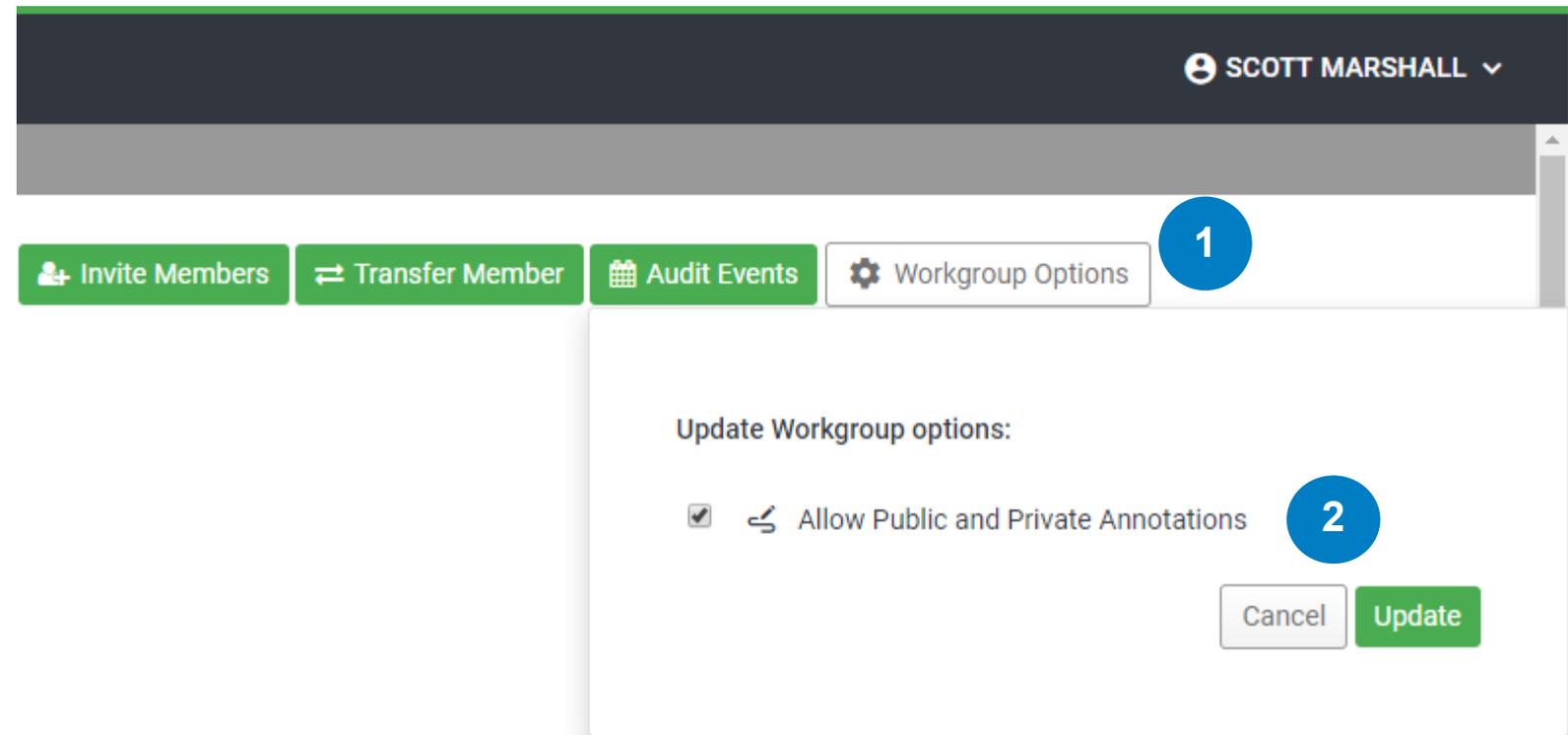
Objective Connect supports adding annotations to Microsoft Office documents, Abode PDF documents and images. This is useful if you want to prepare for a board or committee meeting and you can add your annotations as 'margin notes' for your reference.

As an Enterprise Administrator you can control if your workgroup members can use the annotations feature.

When you enable annotations, your workgroup users will be able to add and view annotations. When you disable annotations, the annotation options and the **Annotations** pane will not be visible.

To enable or disable the annotations feature:

1. Go to the workgroup for which you want to enable or disable annotations and select **Workgroup Options**.
2. Enable or disable **Allow Public and Private Annotations** and select **Update**.



## 4. MANAGING MEMBERS

# Inviting New Members

Before a user can create Workspaces in Objective Connect they must first be added to the Connect Users group within Objective ECM (due to customised ECM configurations this security group can be named differently).

1. Add new users to the **Connect Users group** in ECM.

When users are added to the Connect Users group, if their email address is not yet registered with Objective Connect, they will receive an invitation email. The user needs to follow the prompts to accept this invitation.



## Associated Email Domains

Objective Connect can also be configured to automatically add a user to a Workgroup based on their email domain. If this feature is implemented, the user will automatically be added to the Workgroup upon signing up to Objective Connect

# Managing Members

Administrators are able to manage the members of the Workgroup via the Members grid. Each column within the grid can be sorted.

1. The column labelled **Members**, lists the name of each Member. Click a members name for further information.
2. The column labelled **Role**, denotes the permissions assigned to the Member.
3. The column labelled Connections, details the number of **Connections consumed** by the Member.
4. The column labelled **Status**, shows if the Member has accepted their invitation to join the Workgroup. It also shows if a member has been disabled.
5. The column labelled Actions, provides access to **additional features** such as adding Administration Roles and Disabling a Member.
6. The number of members listed on the grid can be set to 10, 20 or 50

When there are a large number of Members additional navigation is displayed at the bottom of the list

Members	Role	Connections	Status	Actions
Scott Marshall	Enterprise Admin	0	Accepted	
Anne Wicks	Workgroup Admin	58	Accepted	
Chelsea Dry	Workgroup Admin	10	Accepted	
Agent User	Member	0	Accepted	
Irene Moss	-	-	Pending	

# Member Details

Further insights into a Member can be gained by clicking a Member's name in the Members grid. This opens a new page for the selected Member:

1. The Member's avatar is uploaded by each Member under **Settings** (located in the menu under a user name in the top right of the page).
2. Full details of the Member including the number of **Connections** the member has **consumed**, the Role of the Member and the Date joined.
3. The **Workspace list** details every Workspace created by the Member, the number of Connections the Workspace has consumed.
4. The column labelled Actions, provides access to additional features such as **transferring Workspace ownership** and producing an audit trail. These functions are covered later in this guide.
5. Administrators can also **add or remove** a Member's Administration Role or disable access from this page.

Enterprise > Procurement > Anne Wicks

**Anne Wicks**

**Email:** localgov.anne.wicks@mail.com

**Role:** Workgroup Admin

**Status:** Accepted

**Joined:** 2nd June 2017, 9:58 am

**Workspaces:** 18

**Connections:** 58 / 500000

0%

✕ Disable Member Manage Roles

**Workspaces owned by member** Items per page: 10

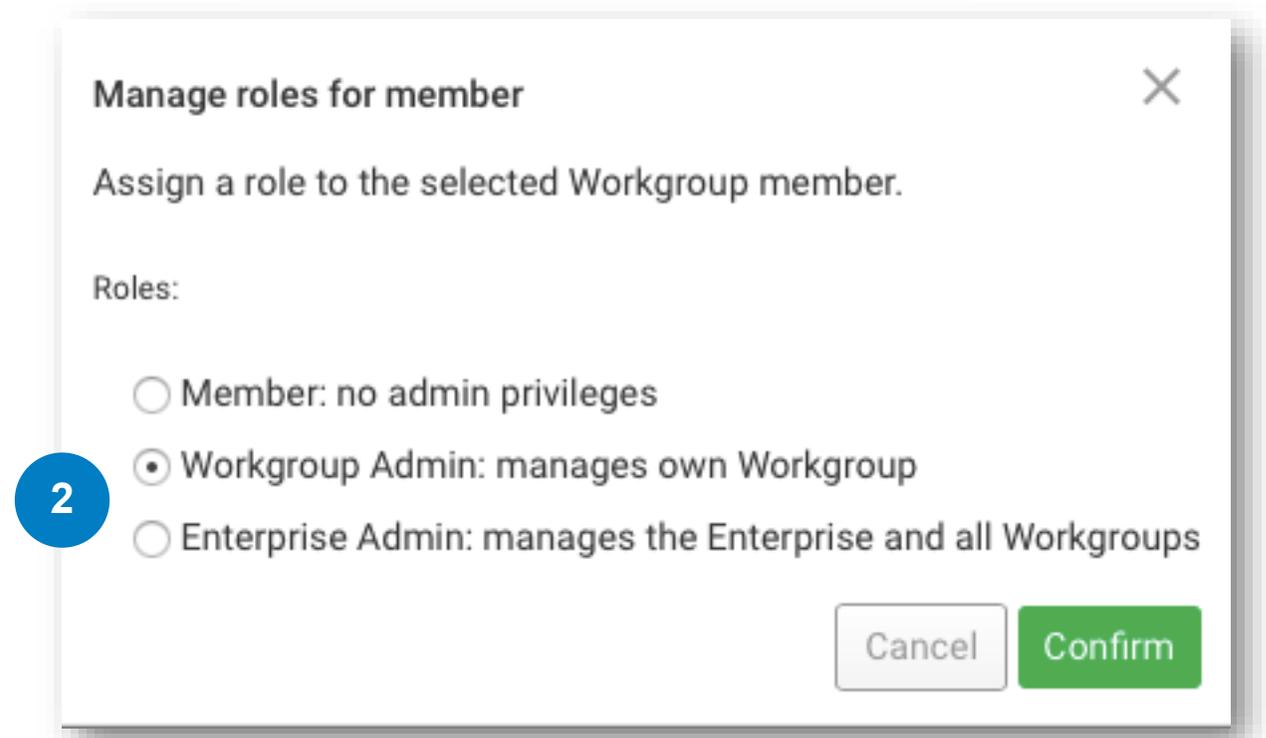
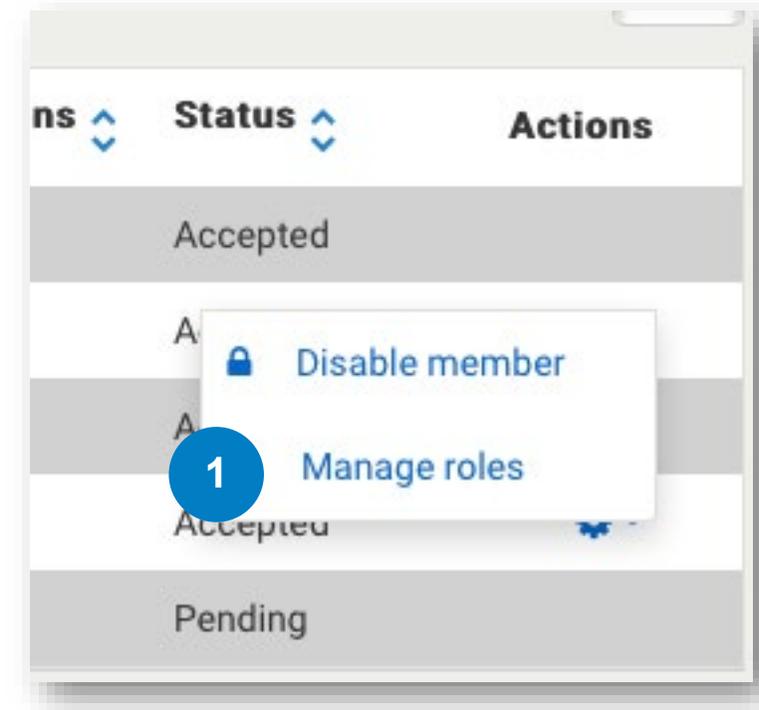
Name	Connections	Created	Actions
001 - Emergency - Standard Procedures	5	29/06/2017	⚙️
001 Board Papers - January 2017	0	30/06/2017	⚙️
001 Chain of Command	5	15/11/2017	⚙️
002 Board Papers - February 2017	0	30/06/2017	⚙️

# Managing Administrators

Once someone has accepted an invitation to join a Workgroup, they can be given permission to access Administration. This allows the user to manage members, run audit trail reports and view Connection consumption,

1. In the Actions Column of the Members Grid, select the cog icon for the Member you want to grant access to Administration. From the drop down menu select '**Manage Role**'.
2. If an organisation has an Enterprise Subscription, a Member can also be granted access Enterprise Administration. This allows the Member to create new Workgroups and view Connection Consumption at an Enterprise level

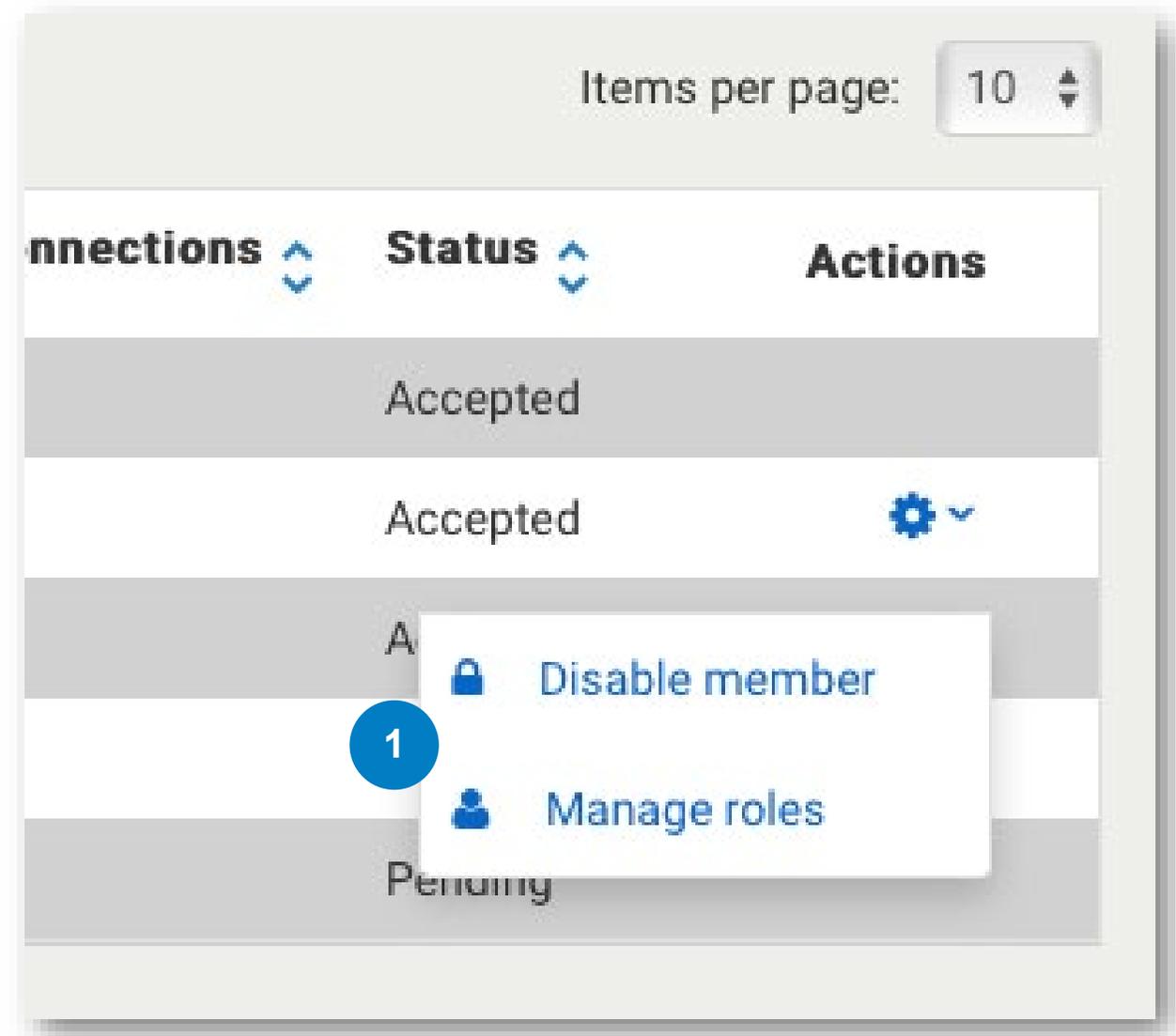
To remove the role of Administrator, simply reverse the above steps.



# Disabling Members

If a Member leaves your organisation, an Administrator can disable the member. This will block the member from accessing Objective Connect.

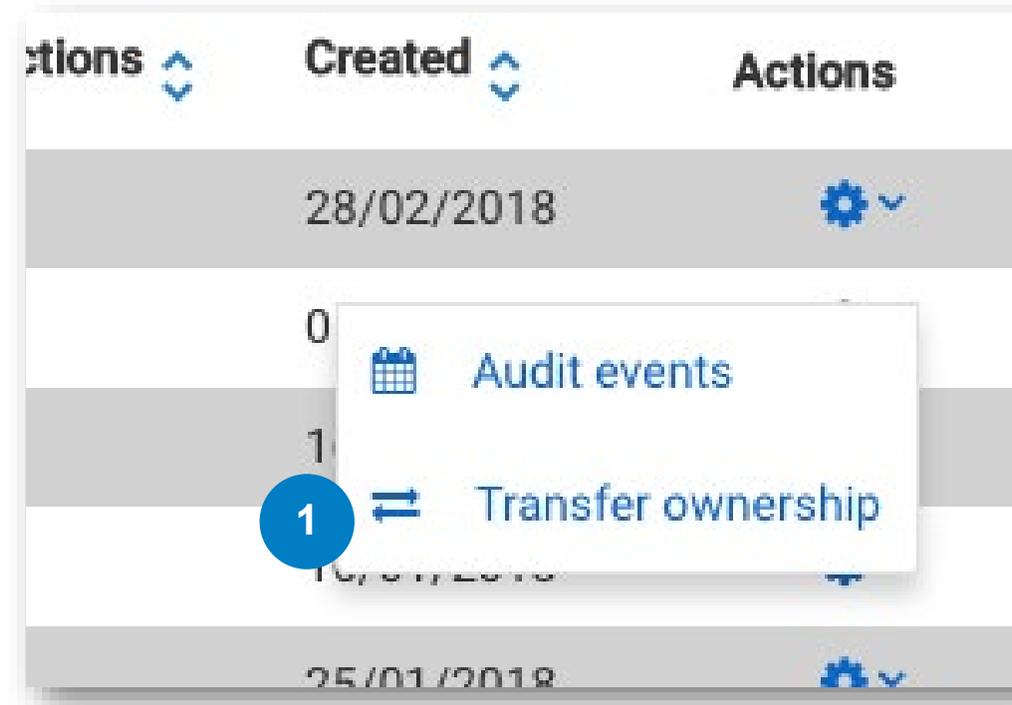
1. In the Actions Column of the Members Grid, select the cog icon for the member you want to disable. In the drop down menu select '**Disable member**'.



# Transfer Ownership

If a Member leaves your organisation or is moved off a project, there may be a requirement to Transfer Workgroup Ownership between the Members of the Workgroup.

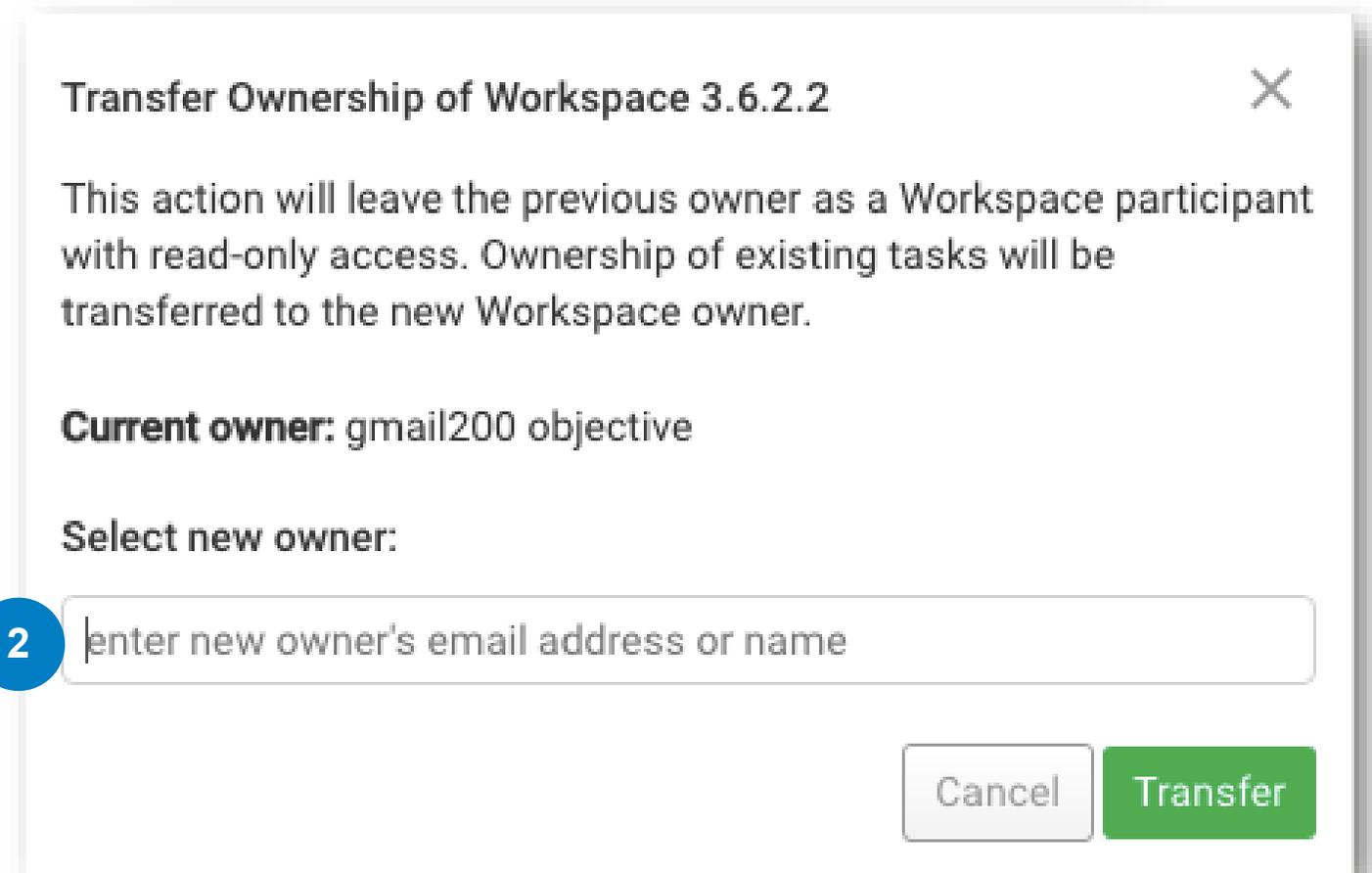
1. **Transferring ownership** of a Workspace can be completed from the Actions Column in the Workspace List from the main Workgroup page or from a Members Page.
2. Select the Member you wish to transfer the Workgroup to.



# Connect Link

The ability to Transfer Ownership **requires a version of Connect Link 2.4.2**. If unsure of your Connect Link version, please contact the Objective Connect Team.

**Note:** Due to the many security checks taking place, Transfer Ownership is not instantaneous when Connect Link is implemented. Please wait at least 5 minutes for this function to be completed.



# 5. MANAGING CONNECTIONS

# Managing Connections

As stated earlier, Connections are the **unit of currency** within Objective Connect. Connection consumption can be viewed:

1. **Per Member** in the Member's grid.
2. **Per Workspace** in the Workspace Grid.

Connections can be recycled by either removing participants from a Workspace, by deleting documents or ending a Workspace.

Members					Items per page: 10
Members	Role	1	Connections	Status	Actions
Anne Wicks	Workgroup Admin		58	Accepted	
Chelsea Dry	Workgroup Admin		10	Accepted	
Agent User	Member		0	Accepted	
Scott Marshall	Enterprise Admin		0	Accepted	
Irene Moss	-		-	Pending	

Workspaces					Items per page: 10
Name	Owner	2	Connections	Created	Actions
Operation - Alpha	Anne Wicks		24	29/06/2017	
Operation - H2O	Anne Wicks		10	29/06/2017	
Operation - Four Leaf Clover	Chelsea Dry		7	02/11/2017	
Operation - Four Leaf Clover	Anne Wicks		7	02/06/2017	
001 - Emergency - Standard Procedures	Anne Wicks		5	29/06/2017	

## 6. AUDIT TRAILS

# Producing an Audit Trail

Every action taken in Objective Connect is tracked and recorded within an audit trail. For Administrators, this provides the ability to know exactly who did what and when. The audit trail includes information including, but not limited to:

- The date a Workspace was **created**.
- The date a Participant was **invited**.
- The date a document was **downloaded**.
- The date a document version was **updated**.

An audit trail can be produced for a specified **date range** across the entire Workgroup or for a particular Workspace.

1. To produce an audit trail report for the entire Workgroup click the **Audit Events** button at the top of the Workgroup page.
2. Enter a date range.
3. Click Export to produce a **.CSV file** which can then be opened in a spreadsheet application such as MS Excel

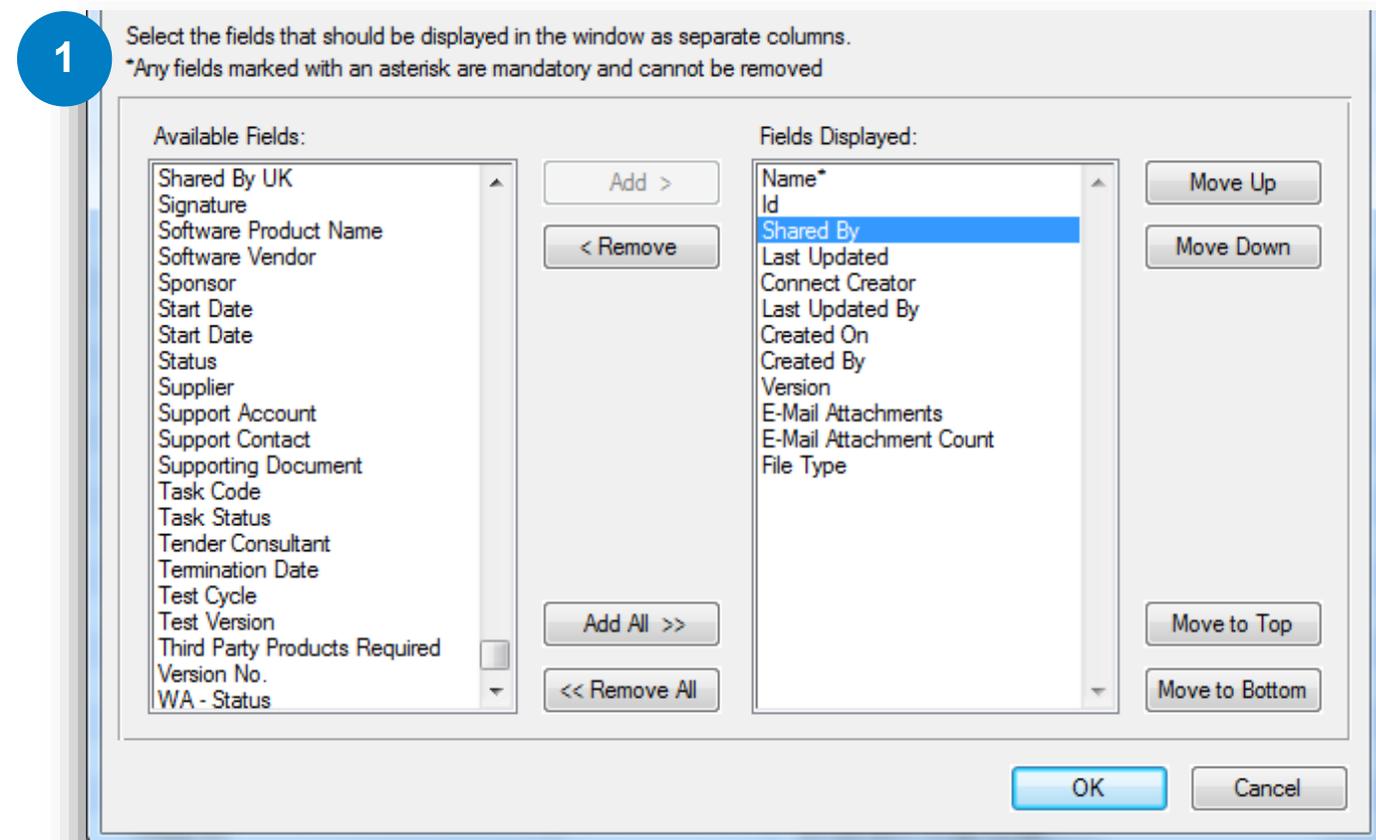
To produce an audit trail for an individual Workspace, click the cog icon in the Actions Column of the Workspaces grid. As above, you will be prompted to enter a date range and then click Export.

The screenshot shows a dialog box titled "Audit Events" for "Procurement". It includes a "Start date:" field set to "01/01/18" and an "End date:" field set to "28/02/18". The "Export" button is highlighted in green, and the "Cancel" button is grey. The dialog also contains the text "Audit events are limited to a year from the start date."

# 'Shared By' in ECM

To see if a folder within Objective ECM has been synchronised with a Workspace in Objective Connect, a user can display the '**Shared By**' catalogue field to the grid in Objective ECM.

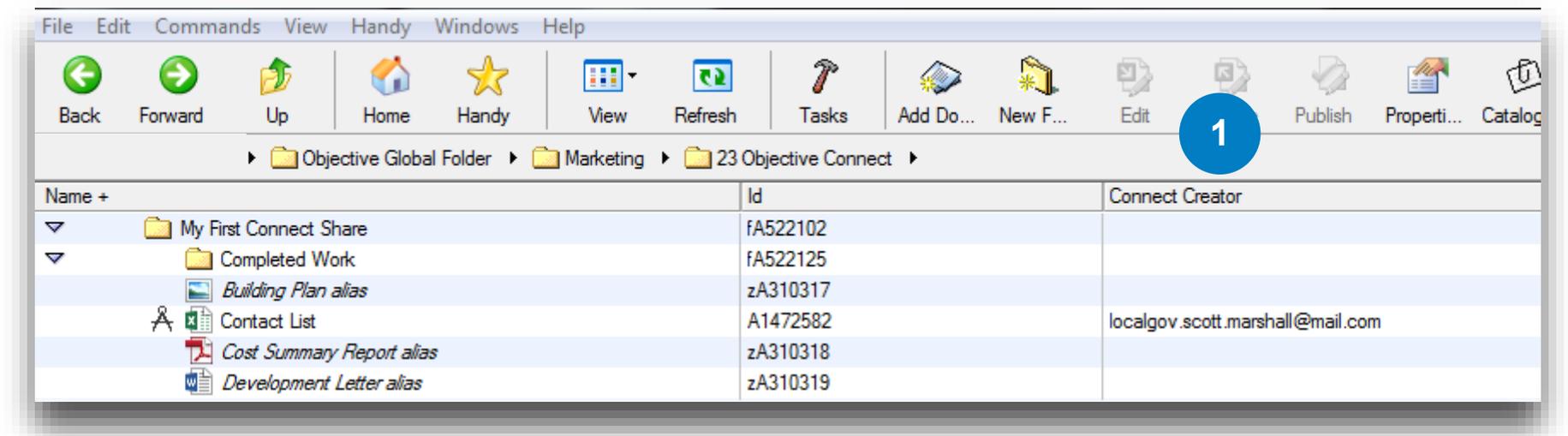
1. To add the catalogue field, right click in Objective ECM and select **Show Columns**. Scroll through Selected Fields, highlight 'Shared By' and click the 'Add' button.
2. Once the field has been added it will display the **user who has synchronised the folder**.



Name +	Id	Shared By	Last Updated	Conr
My First Connect Share	fA522102	Chris Britton	01/25/2017 04:16:23 PM	
Completed Work	fA522125		01/25/2017 03:07:08 PM	
Building Plan alias	zA310317		01/25/2017 11:52:04 AM	
Cost Summary Report alias	zA310318		01/25/2017 11:52:05 AM	
Development Letter alias	zA310319		01/25/2017 11:52:05 AM	

## 'Connect Creator' in ECM

When a document has been uploaded by a Participant via Objective Connect the 'Connect Creator' catalogue field is updated with the participants email address. To display the catalogue field, right click in Objective ECM and select Show Columns. Scroll through Selected Fields, highlight '**Connect Creator**' and click the 'Add' button.



1. Once the column has been added it will display the **user who uploaded the document** via Objective Connect.

## **Objective** CONNECT

**With government-grade security, Objective Connect creates secure, private workspaces in the cloud to collaborate on documents, capture conversations and control tasks.**

From cross-agency collaboration, working with outsourced service providers or simply digitally engaging with customers and citizens, Objective Connect can be used to manage any process involving external parties.

Information Governance can be maintained by integrating Objective Connect with an organisation's existing document and records management system, ensuring a 'single source of truth' is always maintained, even when working with external parties.

Because it can be used to manage any business process, Objective Connect enables digital transformation – removing the need for paper, email, thumb drives, DVD's and rogue or shadow IT.

[www.objectiveconnect.com](http://www.objectiveconnect.com)

## About Objective Corporation

**Objective creates information and process governance solutions that are effortless to use and enable organisations to confidently advance their own digital transformation.**

Designed for regulated industries, these solutions turn the imperative of compliance, accountability and governance into an opportunity to streamline business processes and deliver the innovative services that customers expect.

With a heritage in Enterprise Content Management (ECM), Objective's expanded solutions extend governance across the spectrum of the modern workplace; underpinning information, processes and collaborative work-spaces.

Through a brilliant user experience, people access the information they need to progress processes from wherever they choose to work.

[www.objective.com](http://www.objective.com)