

# T4 – Using the Document Center<sup>1</sup>

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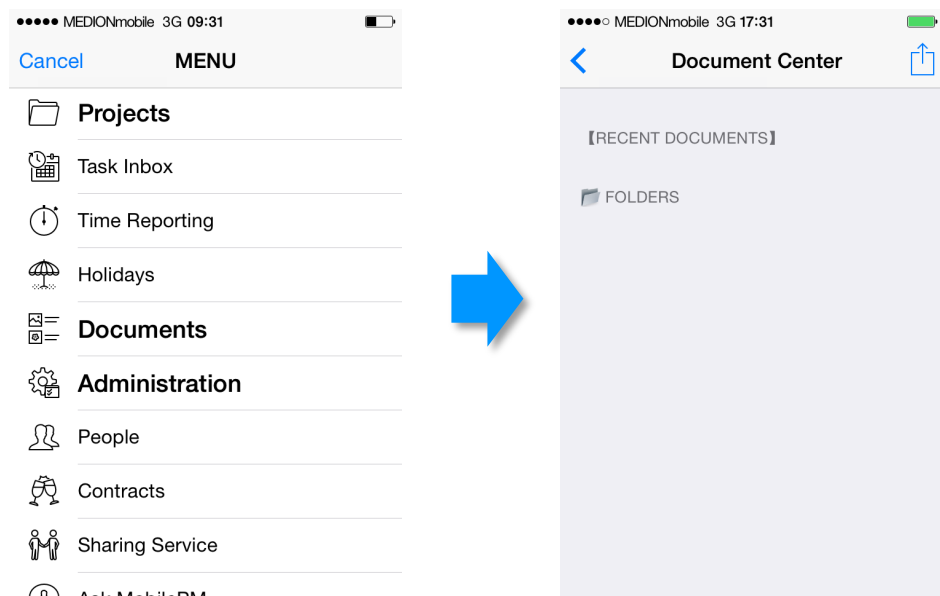
MobilePM offers the option of storing documents in various formats (pdf, dxf, docx, jpg, etc.) and assigning these to various projects (dto. jobs) as necessary. The "Document Center" is available for this. This is called up under Documents in the main menu. In the following tutorial we describe the fundamental functions of the "Document Center" and its use on the basis of simple examples.

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## First step: Calling up the Document Center

Press the "Documents" button in the main menu. The Document Center opens automatically:




The Document Center is organised into 2 areas: The top area with the heading [RECENT DOCUMENTS], in which the inserted documents can be found, and the bottom area with definable folders and folder structures (with the heading [FOLDERS]), into which it is possible to distribute the inserted documents.

## Second step: Inserting documents


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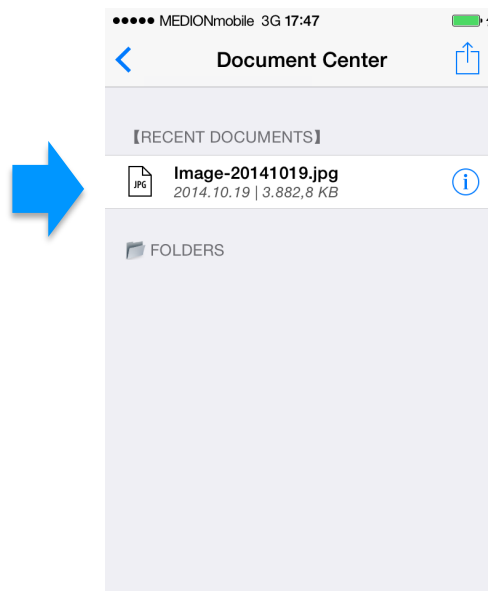
1) Valid for MobilePM Version 1.0.0

By pressing the  button at the top right, the user is offered 3 possibilities for inserting documents in the Document Center from various sources:

1. Photos from an iPhone album
2. Information from the internet
3. Email attachments


#### Re. 1: Photos from an iPhone album

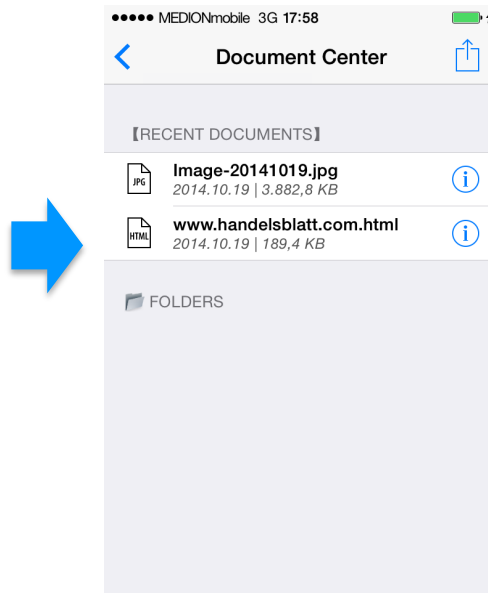
Press the  button, top right. Select "pick image from iPhoto" in the selection window that appears. The photo album on your mobile phone opens automatically. You select a photo by clicking on it. The display immediately switches to the Document Center and the imported "Image" is displayed as an inserted white document line with the file name and size:




Clicking on the  button on the right hand side allows the user to view the imported image in the center.

#### Re. 2: Information from the internet

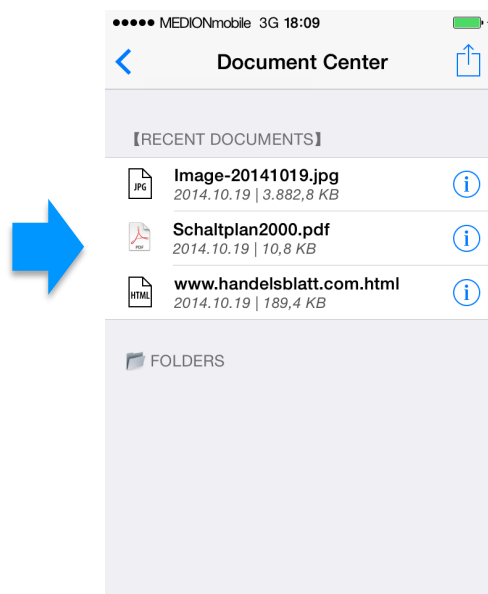
Press the  button, top right. Select "Download from Internet" in the selection window that appears. A small white window ("Download using URL") opens. In this window, click on the desired URL address of the relevant website, for example: <http://www.handelsblatt.de>. After a short time, the imported website appears in the Document Center as an inserted white document line:




By clicking on the  button on the right hand side you can immediately check whether the automatic link to the website and to the desired information functions fault-free.

### Re. 3: Email attachments from an email account


Open your email account and call up the email containing the relevant attachment (e.g. a pdf file). Press the attachment symbol for around 2 - 3 seconds, during which it will darken slightly. A selection window will open containing the "MobilePM Symbol". Click on this. MobilePM and the Document Center open automatically. In order to update this with the imported email attachment, briefly switch back to the main menu and then press the "Documents" button to access the Document Center. The imported email attachment now appears as an inserted white document line (in the example: Circuitdiagram2000.pdf):




Clicking on the  button on the right hand side allows the user to immediately view the imported document.


### Third step: Adding comments to imported documents

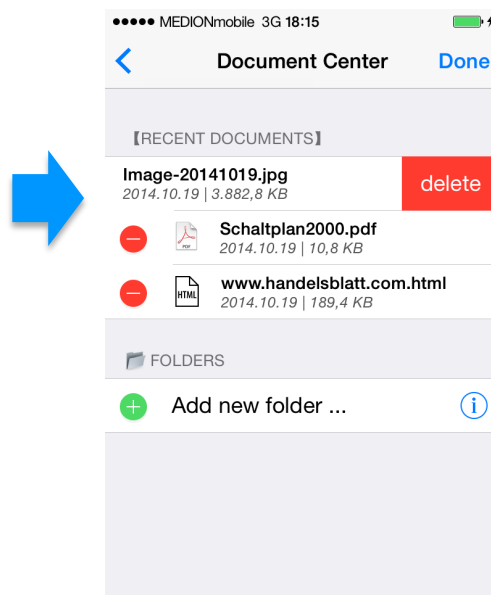
With this function, MobilePM offers the highly useful option of adding (also lengthy) comments to documents stored in the Document Center. These may be a memo applicable to a document or a detailed description of a photographed object. In order to create the comment click on the corresponding white document line for approx. 2 – 3 seconds, until the black field ("Move" / "Cmnt.") opens. Click on "Cmnt". The screen is filled with a white comment field, which already contains the document name. If you now click inside the field, the keypad opens and you can enter your arbitrary text. Alternatively, it is also

possible to use Siri  for voice entry of the text; this will then be shown in the field.

In order to save, click on the  button at the top right and confirm the "Select action field" with save. The comment is now connected with the document.

### Fourth step: Deleting inserted documents

In order to delete a document press the  button at the top right. Select "Edit table" from the selection window that appears. Red traffic light symbols appear on the left hand side. Click on the traffic light for the document you wish to delete and a red "delete" softkey will appear on the right:




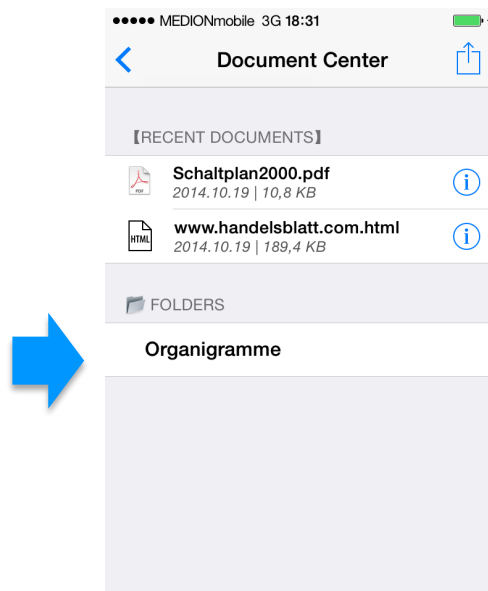
If you click on the delete field a (Confirmation) window will appear, asking you if you really wish to delete the document ("Yes, delete it") or if you wish to abort the action ("Cancel"). If you press "Yes ..." then the document will disappear from the Document Center. Subsequently confirm the process with "Done" (the traffic lights disappear).

### Fifth step: Creating folders, establishing folder structures

MobilePM enables the quick and flexible construction of a tailored folder structure in the Document Center. The Document Center is primarily intended as an intermediate storage point for the temporary data storage of project and job-relevant documents. The folder structure is therefore limited to a single level and sub-folders are not available. As is standard in practical project management, it is assumed that the majority of documents stored in the Document Center will be allocated to the various projects (dto. tasks) sooner or later and stored there, at which point they will disappear from the Document Center.

a. Creating a new folder

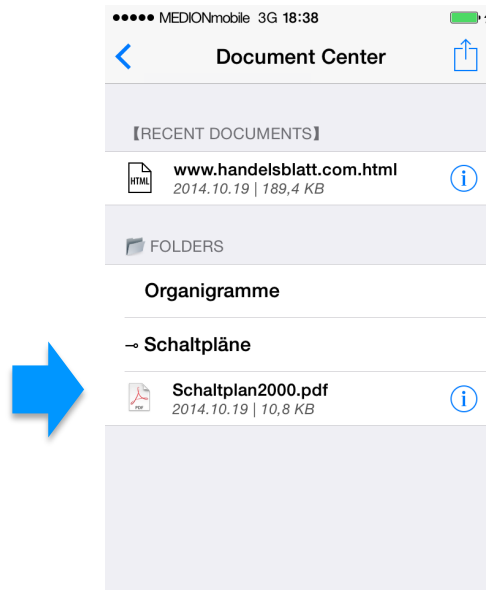
Press the  button, top right. Select "Edit table" from the selection window that appears. Click on the green traffic light for "Add new folder...". Enter a new folder name in the window that appears; this should be short and succinct (e.g. organigram). Close the window by clicking on OK and confirm with Done. The new folder now appears in the Document Center under [FOLDERS]:



You can also create a new folder inside the Document Center at the same time as moving a document, as follows:


b. Assign document to a folder

Click for approx. 2 - 3 seconds on the corresponding white document line (e.g. on an image) until the black field ("Move" / "Cmnt.") opens. Select "Move". A rolling selection window appears, containing the available folders. It is also possible to automatically create a new folder by clicking in the field "New folder". If you select the "New folder" field and confirm this with OK, enter a folder name (e.g. Circuitdiagrams) in the window that opens ("New target folder") to create the folder into which the document (e.g. Circuitdiagram2000.pdf) is to be moved. This will then take place automatically when the OK button is pressed:





If you select a previously created folder from the rolling selection window then the document will be saved here automatically. Clicking on the folder brings up a list of the documents it contains. An arrow next to the folder name indicates that the folder is open. A small star will be shown to the left of closed folders containing documents. If a folder contains no documents then no cross or arrow will appear next to it.

#### c. Deleting folders

Press the  button, top right. Select "Edit table" from the selection window that appears. Red traffic light symbols appear on the left hand side. Click on the traffic light for the corresponding folder and a "delete" softkey will appear. If you click on the field a ("Confirmation") window will appear and you will be asked whether you wish to abort the action ("Cancel") or really delete the folder ("Yes, delete it"). ATTENTION: If the deleted folder contains documents then these will also be deleted. As soon as you press "Yes ..." the folder will completely disappear from the Document Center. Subsequently confirm the process with Done (the traffic lights disappear).

#### d. Renaming folders




Press the  button, top right. Select "Edit table" from the selection window that appears. Click on the  button on the right side of the folder that is to be renamed. Enter the chosen new folder name in the window that opens (Change folder name) and confirm this with OK and Done.

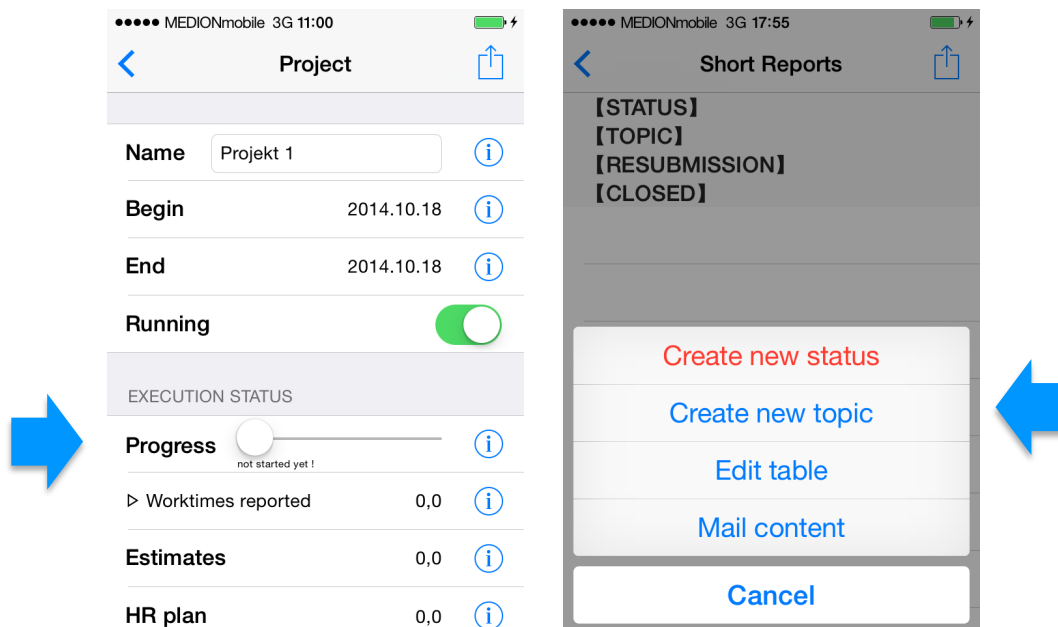
### **Sixth step:** Moving documents from the Document Center into projects (dto. jobs)

The following is a description of how to move documents from the Document Center into a project (dto. job). In order to move the document, it must be located in the Document Center in the top area [RECENT DOCUMENTS]. If it is stored in a folder in the




[FOLDERS] area then you will first need to move it (as described in point b of the fifth step) back into [RECENT DOCUMENTS] using the rolling selection window, by clicking and confirming with the "Move" button.

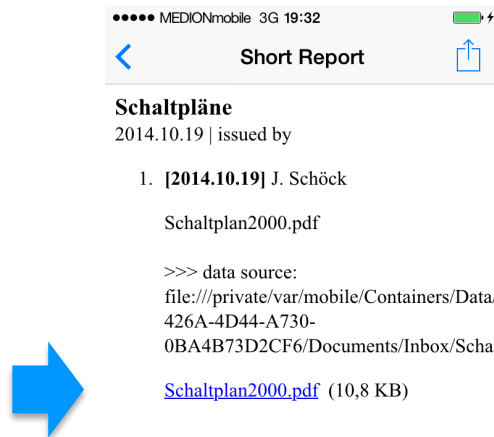
Press the button "Projects" in the main menu. A list of the projects you have created to date will appear automatically. If you have not yet created a project then you can do this with the help of the tutorial "Creating a project".

Click on the  button on the right hand side to select the project into which you wish to move the document from the Document Center. Now click on the  button next to "Progress" on the right hand side. Multiple terms will now appear on the display in square brackets, including the term [TOPIC]. Press the  button at the top right. Select "Create new topic" from the selection window that appears:



Enter a name for the folder in the window that opens (e.g.. Schaltpläne), into which the document (e.g. Schaltplan2000.pdf) is to be moved from the Document Center. Close the window by selecting OK. The folder name will now appear in a large white editing field.

Press the  button at the top right. Select "Create new note ..." in the selection window that appears, followed by "Select document imported" in the subsequent window. You will now be shown a list of the documents archived in the Document Center under [RECENT DOCUMENTS]. As soon as you have clicked on the document that you wish to move from your defined folder into the project, a plus sign  will appear on the right to indicate that it has been selected. It is also possible to select multiple documents for transfer. Now click on the  button at the top right and subsequently select Save. The white editing field now appears once again, supplemented by the transferred document (Schaltplan2000.pdf in this example):



By clicking on the document line (Schaltplan2000.pdf in this example) you can open this and check it. This document (Schaltplan2000.pdf) has now disappeared from the Document Center and can be found under [Topic] in the project inside the "Schaltpläne" folder:

**Congratulations!** You have now successfully completed the preparations for the effective use of the MobilePM Document Center. Once you have independently inserted a few documents in structured folders you have created inside the Document Center and moved these to various projects, you will be able to carry out these processes quickly and routinely.

*(Das Tutorial wurde von Dr. Joachim Schöck im Auftrag von MobileLifeDesign erstellt)*