



docmoto

## Version 3.8 - What's New?

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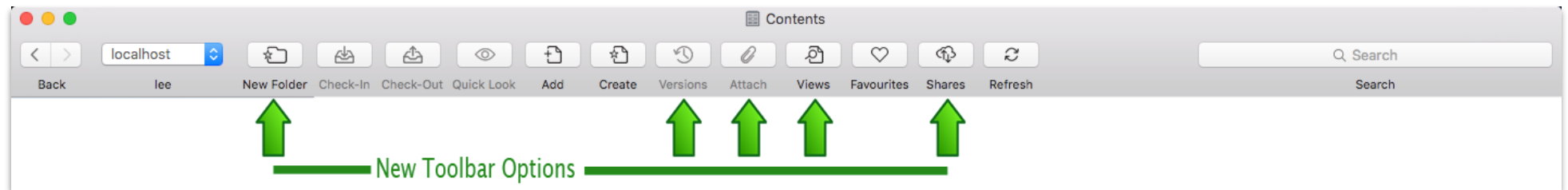
## Introduction:

This document highlights the new features and user interface changes within DocMoto version 3.8.

## Toolbar:

The DocMoto tool bar has been updated, it includes new buttons for existing functions that are used on a frequent basis and some additional buttons for new functions.

**Fig. New Toolbar.**



### Existing functions with new buttons:

- New Folder – Creates new folders standard & template.
- Versions – Shows version history of the document selected.
- Attach – Attaches documents stored in DocMoto to an email (using the user's preferred email client).

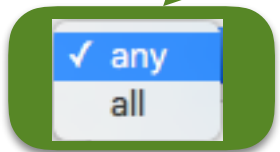
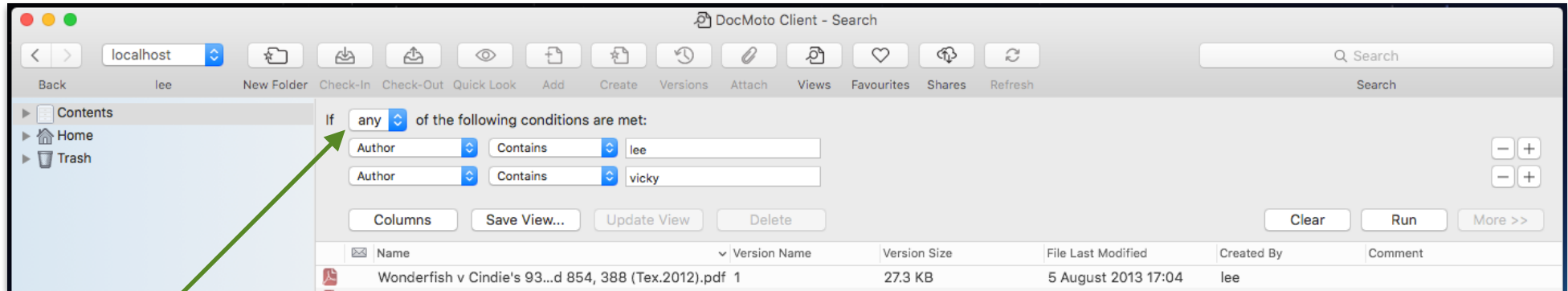
### New Functions with new buttons:

- Views – Users can create realtime views through the advanced search options. These views can be specific to a user or global and portable (i.e. will be available no matter where a user logs into the system).
- Shares – Users can create shares with non DocMoto users (if given permission by administrators).

## Searching:

DocMoto searching has increased capability including an option for OR search criteria as well as the existing AND condition.

Fig. Search Example (OR condition).



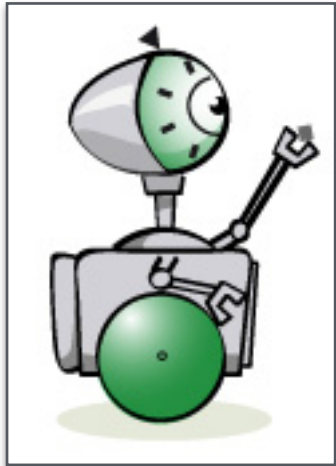
The example above illustrates a search using the OR condition – i.e. If the “**Author**” contains “**lee**” or “**vicky**” then return the document as a result. Searches can be one condition or the other NOT both – i.e. All criteria is AND’d or all criteria is OR’d.

## Views:

DocMoto's saved search routines have been adapted to create realtime views. Views can be specific to a user or global (across the whole user group) and are portable (i.e. will be available no matter where a user logs in).

To create a view a user a user must first conduct a search based upon a keyword. A keyword can be:

- Folder or File name – search will automatically list all files and folders matching the keyword.
- Content – content is not automatically listed. However, if a user types in a term/word then selects the return key DocMoto will automatically search content. \*\* Refer to Motie Bot for more info.



**Motie Bot:** “If a user issues a content search by typing keywords into the search user interface, DocMoto will issue the search under all possible conditions”.

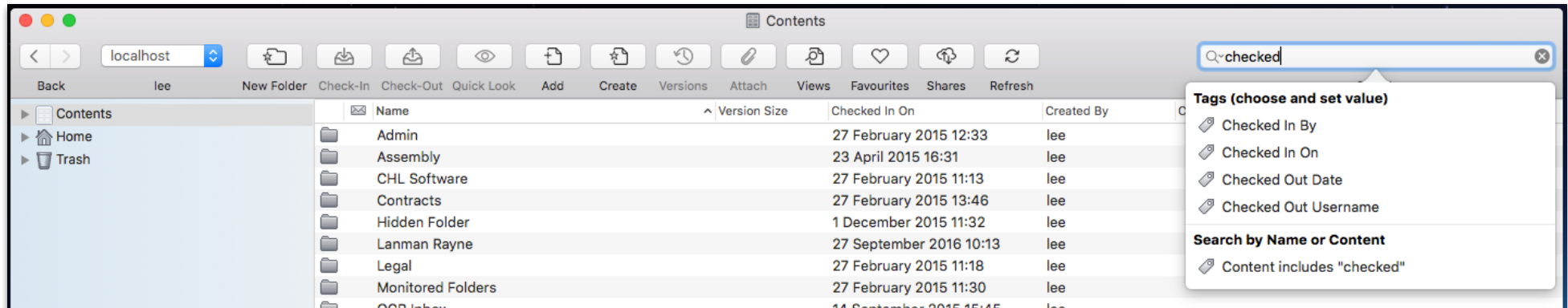
- All Words – Returns a match when a file contains all the specified words.
- Any Word – Returns a match when a file contains any of the specified words.
- Phrase – Matches the entire phrase.
- Advanced – Use Spotlight query syntax to define the criteria.

- Tag name – search will automatically list all tags within the system matching the keyword.

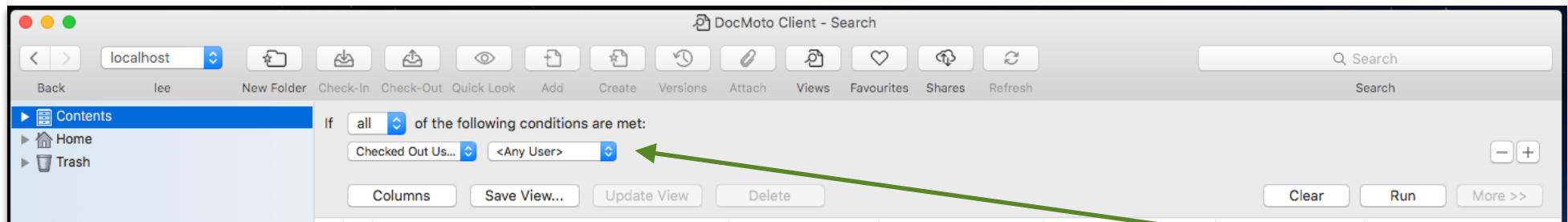
An example of how to create a “**View**” is listed below. This example is based upon a realtime view of all files currently “**Checked-Out**” and who has them “**Checked-Out**”.

## Creating a View Example:

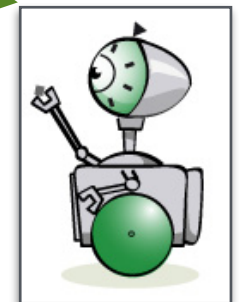
1. Type in a keyword into the search user interface. In this example, the user has chosen “checked” as the search term. DocMoto presents a list of files, folders and tags which contain (or matches) the search term.



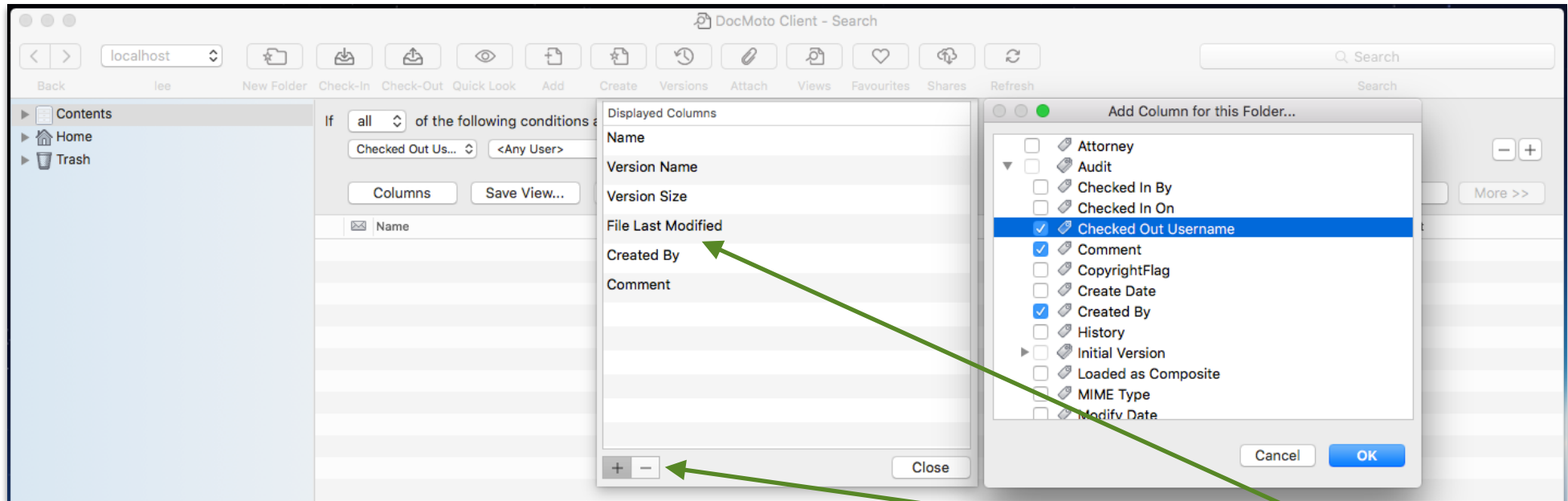
2. Select the base criteria for the search from the dropdown predictive list. As soon as the criteria is chosen then DocMoto will automatically load it into the search engine. In this example, “Checked Out Username” has been selected.



**Motie Bot:** “Any search involving the user group will include the default option of “<Any User>”. This option enables users to conduct searches matching any user within the group. DocMoto always lists the default columns unless the user specifies otherwise. Check out step 3 to find out more.”

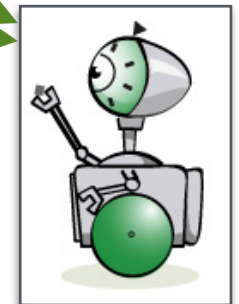


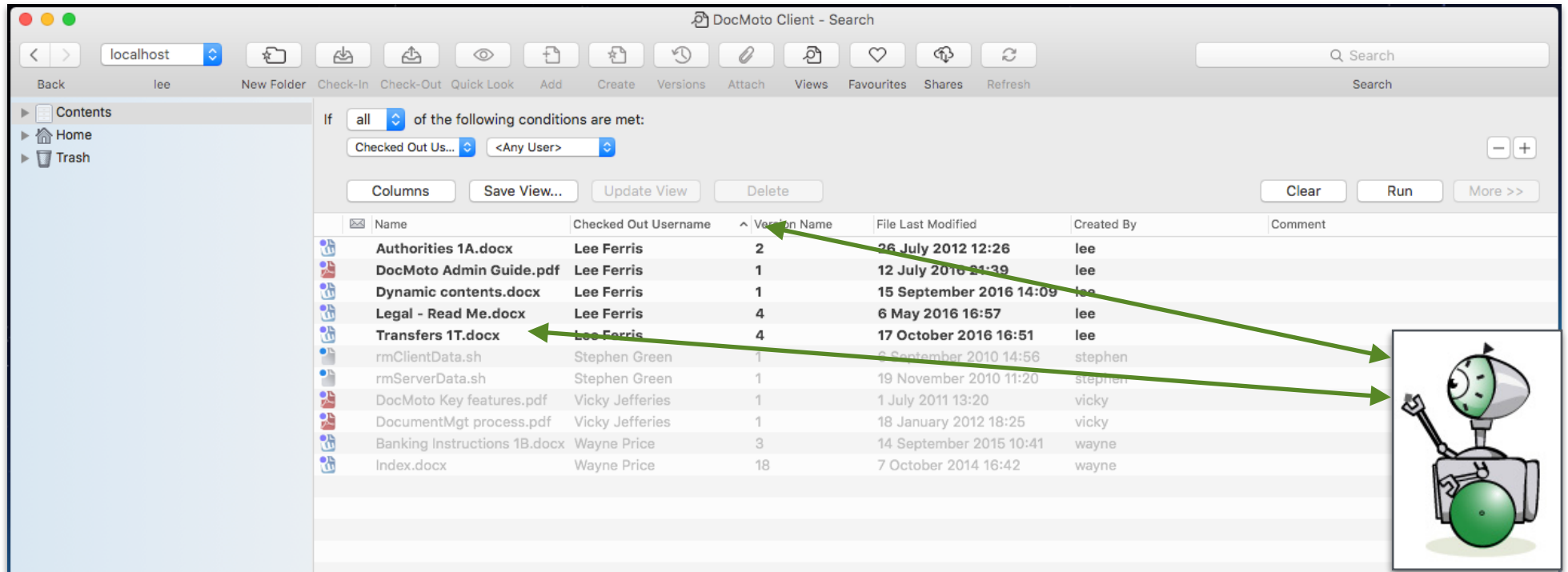
3. Select the “**Columns**” from the search panel. A dialog is presented enabling the user to add or remove columns accordingly.
4. Select the “+” button from the “**Display Columns**” dialog.
5. Navigate to the “**Checked Out Username**” option and select the check-box. Select the “**OK**” button to add.



**Motie Bot:** “Displayed columns can be removed or added. Users can drag the columns up and down the dialog in order of preference.”

6. Select the “**Close**” button to confirm the displayed columns.
7. Select the “**Run**” button to execute the search.

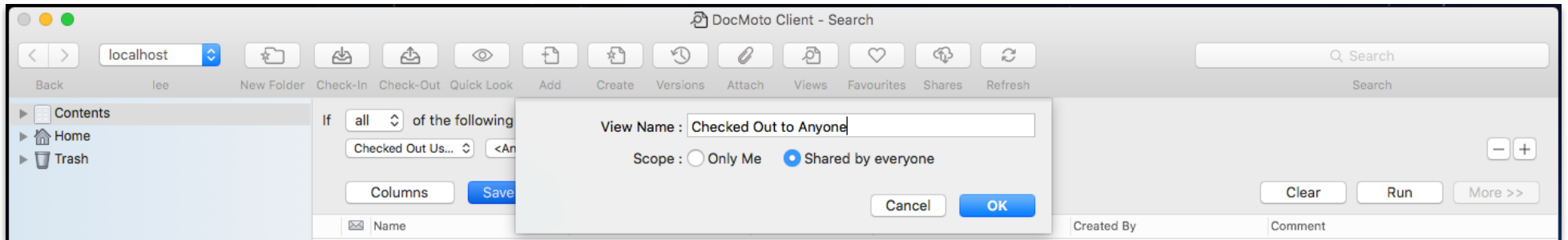




**Motie Box:** “The user running this search has configured his DocMoto Client so that his “**Checked Out**” files are displayed in a bold font whereas other user’s “**Checked Out**” files are displayed in a ‘greyed out’ font. The user has also used the column filter to order the result set by “**Checked Out Username**”. Continue to find out how to save this search as a realtime view”.

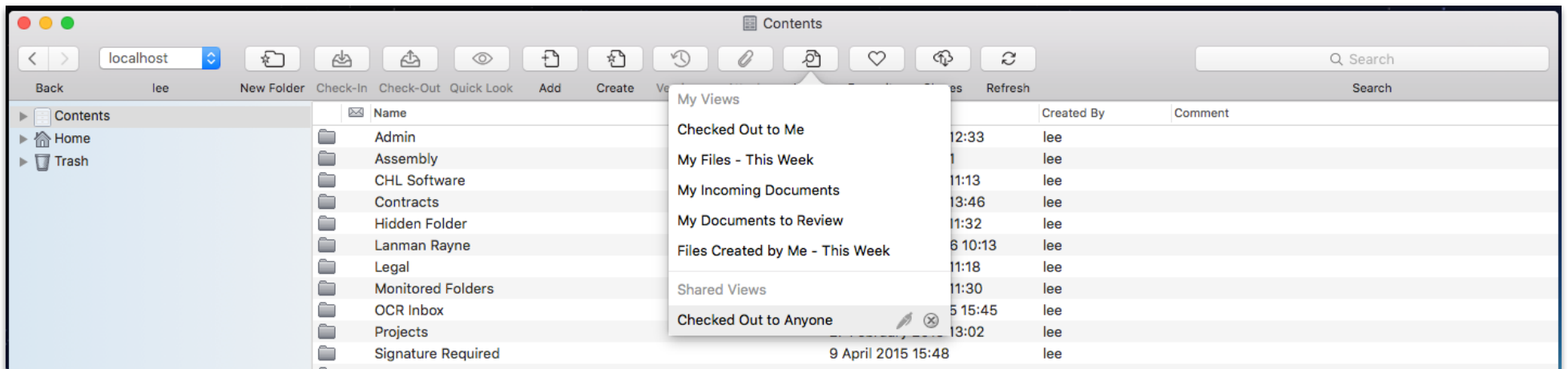
8. Select the “**Save View**” button. The user is presented with a dialog to label the view and to give it scope. In this example the view will be labelled “**Checked Out to Anyone**” and given a scope of “**Shared by everyone**”.





9. Select the “OK” button to save the view.

The view “Checked Out to Anyone” will now be available to all DocMoto users via the “View” button on the toolbar.



## Sharing:

Sharing documents with third-parties can be an issue when the document count or size is too large to use email. Companies can use FTP or file syncing programs but these applications can create as many problems as they resolve, such as:

### Syncing Issues:

- File system is getting too large to synchronise documents efficiently.
  - If 1 GB of data is changed within a synchronised file system and there are 10 accounts registered, effectively 11GB has to be transmitted to accommodate these changes.
- Users don't have enough disk-space on their local machines.
- Has a limited amount of document management tools.

### FTP Issues:

- Standalone system offering no integrations or interactions with the native operating system.
- Separate system to maintain.

The new sharing functionality in DocMoto enables users to share information (with non DocMoto users on an ad hoc basis – with permission by administrators). The shares created can be defined as:

- One or Two way share.
- Time limited.
- Password protected.
- Include version history.

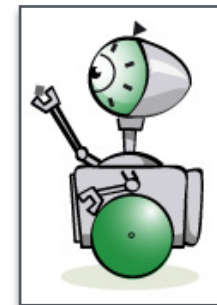
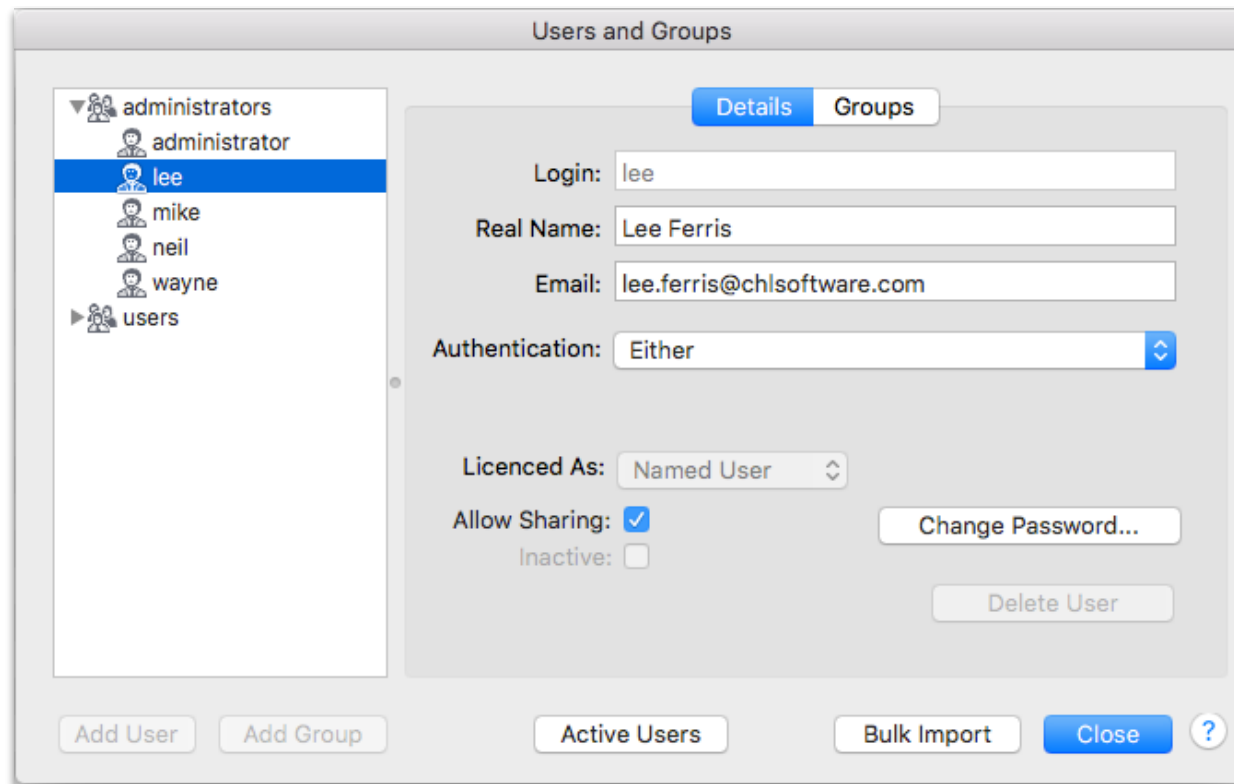
Examples of enabling sharing for users and of users creating a share is included below.

## Example Sharing Set Up:

The first action is an administrator must enable users ability (or permission) to share.

1. Select the “**Users & Groups**” option from the “**Admin**” menu. A “**Users & Groups**” dialog is presented to the administrator, listing all groups and users.
2. Navigate to the group and select the user who requires the ability to share.
3. Ensure the “**Details**” tab is selected in the “**Users & Groups**” dialog.
4. Select the check-box “**Allow Sharing**”.

In the example screenshot below the administrator lee has the sharing functions enabled.



**Motie Bot:** “This example is enabling the sharing functions for an administrator. The methodology for enabling the sharing functions is the same for users.”

## Example user creating a share:

Now the sharing has been enabled lee can create a share.

1. Select the folder to be shared. Select the “**Create Share**” option from the file menu (or by right mouse clicking on folder and invoking the action or pop-up menu).

The screenshot shows the DocMotoClient application window. The 'File' menu is open, and the 'Create Share' option is highlighted. The main window displays a file list with columns for Version, Size, Checked In On, Checked In By, and Comment. A 'Subscribe' dialog box is open, showing options to notify the user of new folders, new files, updated files, and deleted files. A 'Motie Bot' character is pointing to the breadcrumb trail at the bottom of the window, which indicates the current location within the system hierarchy.

**Motie Bot:** “A trip & trick using an existing DocMoto function. If the user selects the ‘Subscribe’ option from the ‘File’ menu, they can pick the actions they want to be automatically notified of.”

**Motie Bot:** “The breadcrumb trail at the bottom of the user interface – indicates where the share is located within the system”.

2. The user will be presented with a “Create Share” dialog.

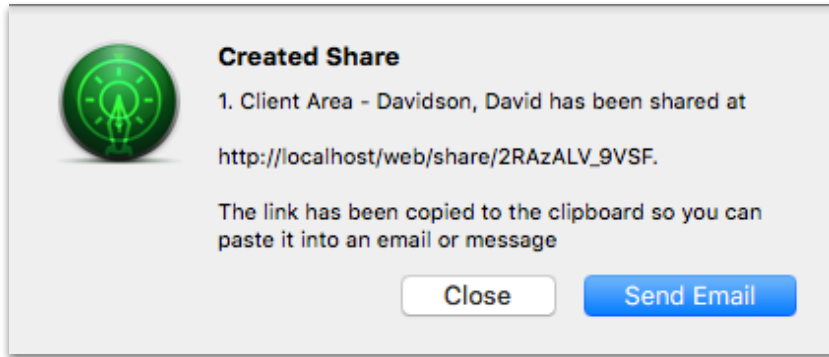
The screenshot shows a 'Create Share' dialog box with the following fields and annotations:

- Sharing:** 1. Client Area (Annotation: Name of the folder to be shared.)
- Name of Share:** 1. Client Area - Davidson, David (Annotation: Name of the share - based upon folder name but can be amended as example illustrates.)
- Recipient Name:** lee.ferris@chlsoftware.com (Annotation: Email address(es) of the recipient(s) for whom the share is created.)
- Expiry Date:** Oct 2016 (Annotation: Expiry date - date picker to enable the user to put a timeframe on the share. Note: Maximum period per share is 28 days.)
- Expires:** Midnight on 3 November 2016 (Annotation: Expiry date - expiry date confirmation.)
- Type:** Folder (Annotation: Type of share - folder or document.)
- Allow Add New Versions:**  (Annotation: Enables third party to revision any document(s).)
- Show Version History:**  (Annotation: Enables third party to check version history.)
- Allow Add New Documents:**  (Annotation: Enables third party to add new documents.)
- Password Protected:**  (Annotation: Password protects the share. i.e. third party must authenticate.)

At the bottom of the dialog are buttons for 'Cancel', 'Create', and a help icon (?).

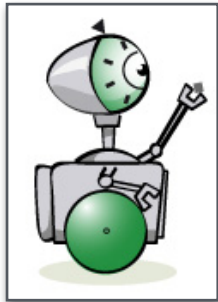
3. Once the user has adjusted the settings for the share, select the “Create” button.

4. A dialog is presented informing the user the share has been created plus an option to generate the email to the recipient.

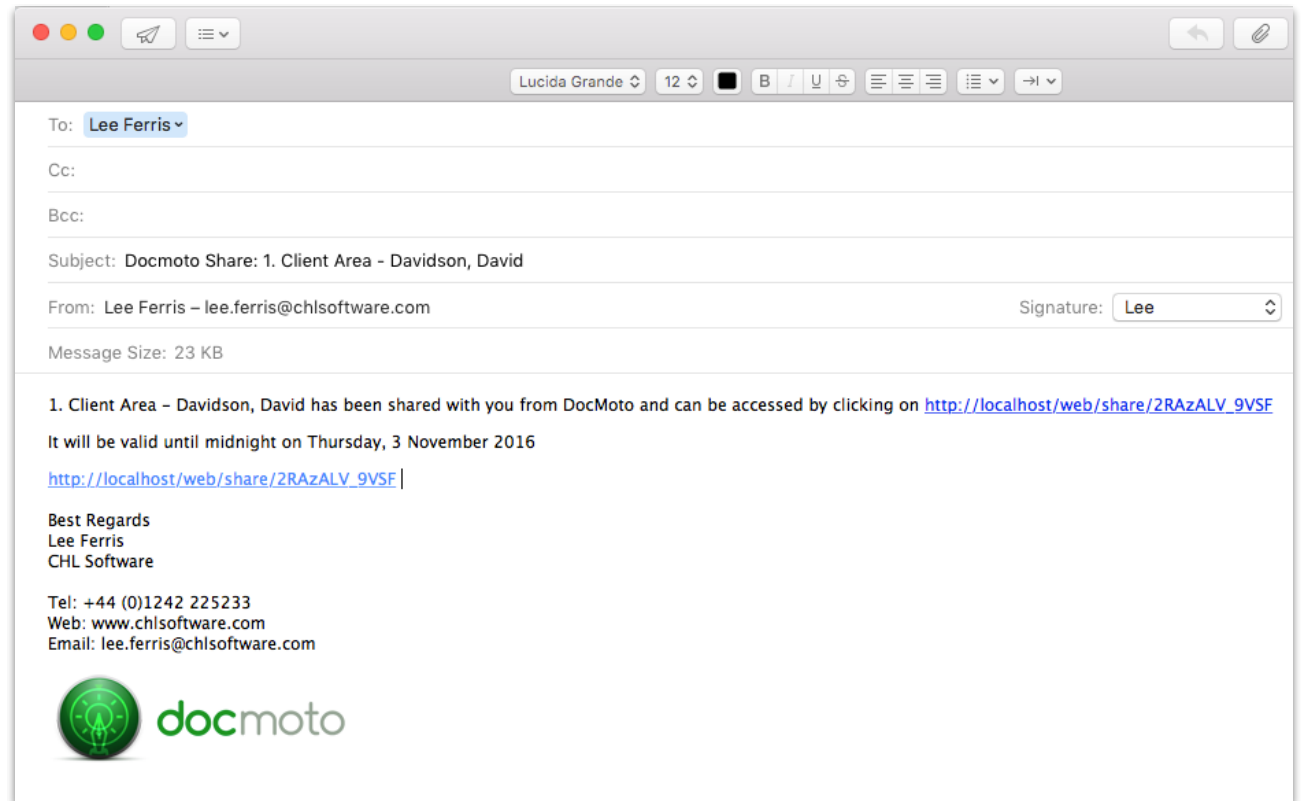


Dialog presented to enable the user to generate the email to the recipient (third party). The “Close” option allows users to send the email at a later date – this will be covered later in this section.

The email is generated as soon as the “Send Email” button is selected. An example email is shown below.



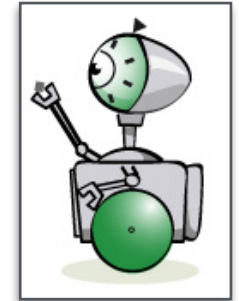
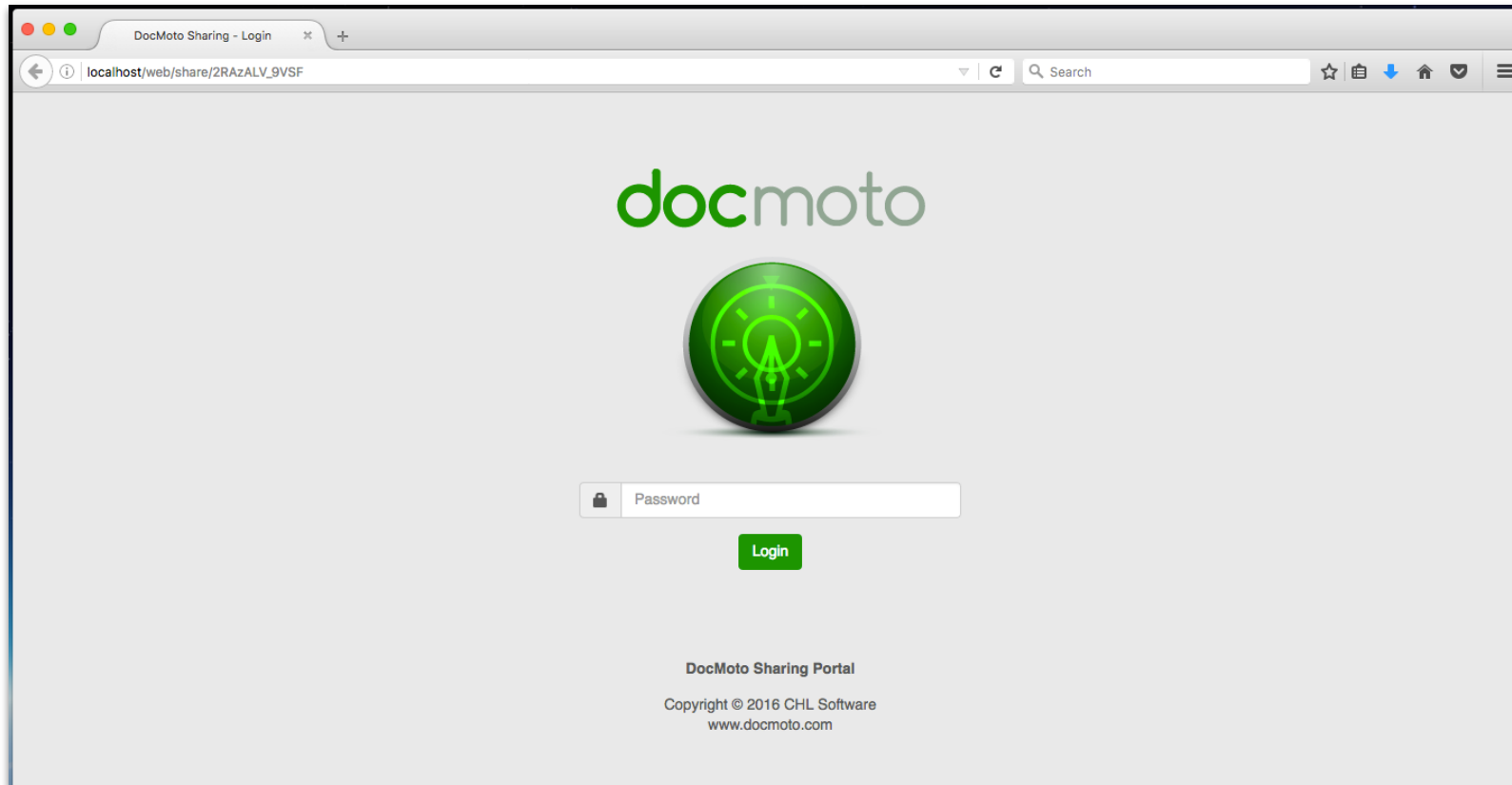
**Motie Bot:** “The email generated by DocMoto will use the email client defined within your DocMoto Client preferences. DocMoto supports: Apple Mail, MS Outlook & Mozilla Postbox”.



## Example results of recipient receiving the share email:

This section deals with the recipient side of the sharing functionality.

1. The recipient (third party) receives the sharing email and selects the shared link embedded in the email.
2. The link automatically opens the browser and presents the DocMoto Share Portal.



### Motie Bot:

“Remember it is good practice to send passwords and logins separately.”

3. The recipient enters the password (if appropriate) assigned to the share and selects the “**Login**” button to authenticate. Once the system has authenticated the login credentials, the recipient is presented with the sharing portal.

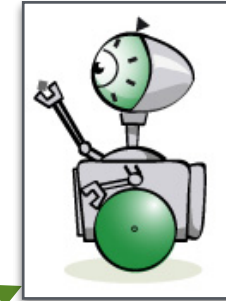
docmoto Logout

Welcome to the DocMoto sharing portal.  
 Sharing folder - 1. Client Area.  
 This share will be available until midnight on Thursday November 3rd 2016.

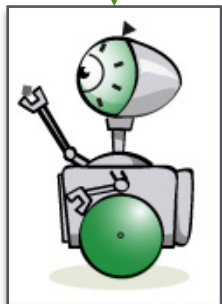
1. Client Area - Davidson, David

<input type="checkbox"/>	Name	Version Size	Checked In On	Checked In By	Comment
<input type="checkbox"/>	AML 1A.docx	26.9 KB	April 28, 2016	david	
<input type="checkbox"/>	Application 1A.docx	27.8 KB	May 27, 2016	david	
<input type="checkbox"/>	Wonderfish v Cindie's 935 S.W.2d 854, 388 (Tex.2012).pdf	27.3 KB	April 21, 2016	david	

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**Motie Bot:** “By sharing files through the DocMoto sharing portal you can be sure of the following: (a) no file size limitations (b) secure (c) a plethora of audit information – which files were downloaded and by whom (d) the share is self maintaining.”



**Motie Bot:** “The sharing portal enables third parties to download, revision, add new, check audit info (details) & history. By incorporating tags within the shared folder (or document) businesses could use the sharing portal as an approval mechanism.”

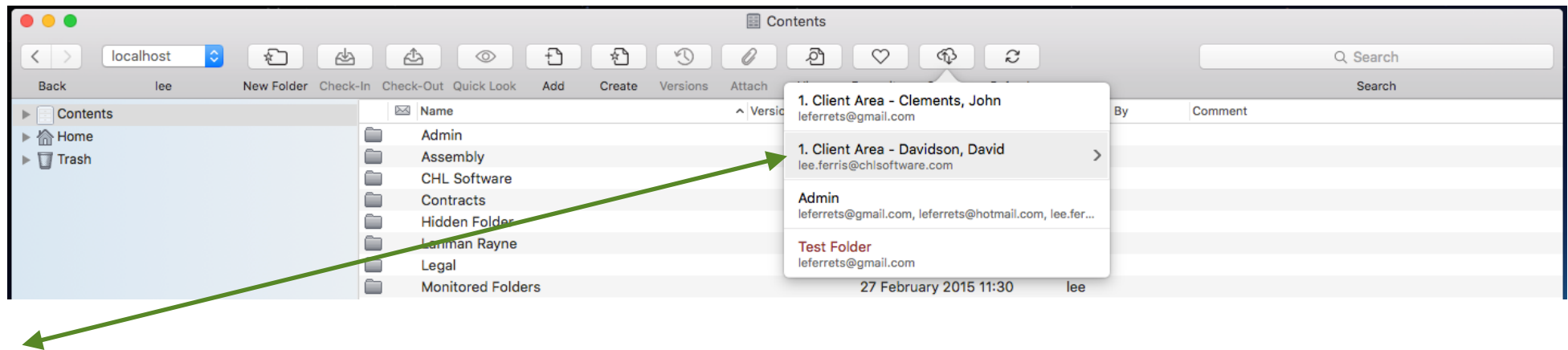


## Example user share controls:

Once a share has been created and used, users have controls in the system to enable them:

- Get a list of shares created.
- Edit the name of a share.
- Change password.
- Remove a share.
- Resend the share to other third parties (add additional recipients).
- Renew the share (if time limit set has expired).
- Copy the share link to the clipboard. Although the examples covered deal with email, share's (link) can be sent via instant message – for instance: (a) iOS devices (b) Messaging apps such as Slack.

The toolbar option labelled “**Shares**” will give the user these options.



List of shares. Any share marked in red has expired. To check (and potentially amend) the details of a share, mouse over the share and select the more icon.

The user is presented with an “**Edit Share**” dialog.

## Edit Share

Sharing: 1. Client Area

Name of Share:

Recipient Name:

Expiry Date: **Oct 2016** ◀ ● ▶

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Expires: Midnight on 3 November 2016

Type: Folder

Allow Add New Versions:

Show Version History:

Allow Add New Documents:

Password Protected:

Password unchanged

Link



Delete

Show

Close

Update



Amend share name.

Add/Amend recipient(s).

Renew (or extend) expiry date.

Amend functions allowed.

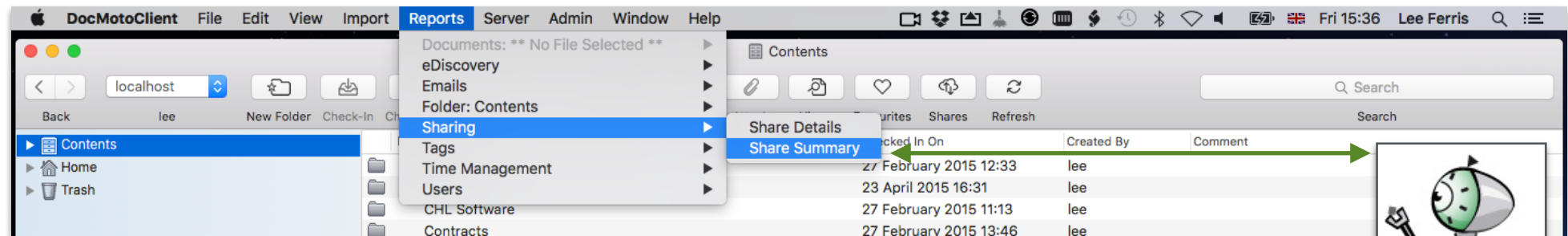
Change password.

Copy link to clipboard.

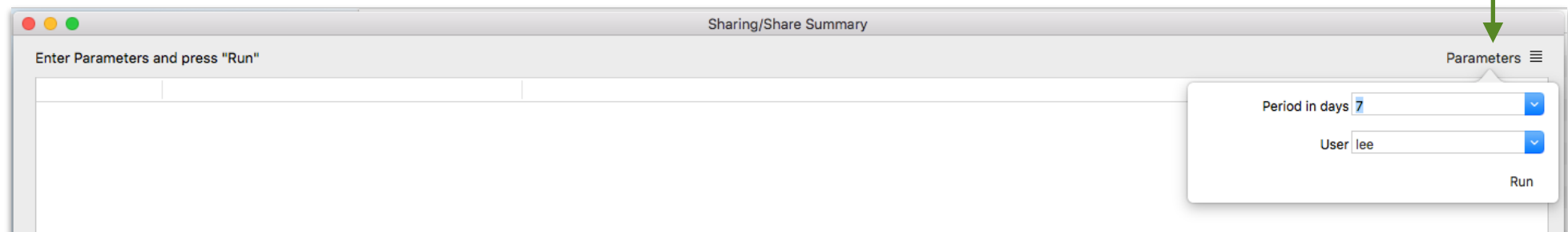
Resend share via email.

## Example Share Report:

DocMoto is shipped with a report section to enable users to get metrics about the system. DocMoto system administrators have to enable and give users permission to use the reports. Once the reports are enabled, they are accessed through the “Reports” menu.



**Motie Bot:** “You have two sharing reports, **Share Summary** & **Share Details**. The **Share Summary** report can be run as a stand-alone report whereas the **Share Details** report works in conjunction with the **Share Summary** report. Most reports give you the capability to set parameters prior to the report being run and the **Share Summary** report is no different. You can set the “**Period in days**” (default of 7) and “**User**” (signed in user as default). Remember any search or report in this case involving the user group will include an option of “<Any User>” as the criteria.

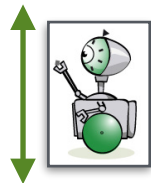


Select the “Run” button.

Sharing/Share Summary

Share summary for past 7 days Parameters

Title	Created By	Created on	Shared Content	Share Type	Recipient	Expiry Date	Status	Last accessed
1. Client Area - Clements, John	lee	Today, 12:52	/Contents/Legal/Clients/A - D/Clements, John/1. Client Area/	Folder	leferrets@gmail.com	4 November 2016 23:59	Active	21 Oct 2016 11:16:14
1. Client Area - Davidson, David	lee	Yesterday, 16:39	/Contents/Legal/Clients/A - D/Davidson, David/1. Client Area/	Folder	lee.ferris@chlsoftware.com	3 November 2016 23:59	Active	Never
1. Client Area - Davidson, David	lee	Yesterday, 18:37	/Contents/Legal/Clients/A - D/Davidson, David/1. Client Area/	Folder	lee.ferris@chlsoftware.com	3 November 2016 23:59	Active	21 Oct 2016 10:16:14



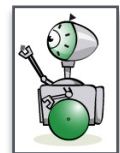
**Motie Bot:** "I have split the "Share Summary" report into two sections to enable you to see the whole report. As you can see the report shows a plethora of audit data on each share instance."

Sharing/Share Summary

Share summary for past 7 days Parameters

	Expiry Date	Status	Last accessed	Number of Downloads	Number of Additions	Number of Updates	Password...	Allow Add	Allow Upd...	Allow View...	Share Hash	Details
om	4 November 2016 23:59	Active	21 Oct 2016 11:54:47	0	0	0	Yes	Yes	Yes	Yes	AIBOqFcaUYm5	<a href="#">Details</a>
ware.com	3 November 2016 23:59	Active	Never	0	0	0	Yes	Yes	Yes	Yes	UfF_apscfWZ9	<a href="#">Details</a>
ware.com	3 November 2016 23:59	Active	21 Oct 2016 10:16:14	0	0	0	Yes	Yes	Yes	Yes	2RAzALV_9VSF	<a href="#">Details</a>

**Motie Bot:** "By selecting the "Details" link within the "Share Summary" report a "Share Details" report is generated using the "Share Hash" from the summary selected."



Sharing/Share Details

Share Details Parameters

Action	Accessed from IP Address	Timestamp
Created Share	127.0.0.1	Yesterday, 18:37
Correct Password	::1	Today, 11:16
Accessed Share	::1	Today, 11:16

Share Hash  Run

## **Favourites:**

DocMoto users will be familiar with the ability to create favourites (areas of significant interest to the user) to ensure easy navigation to areas within the repository. In previous versions of DocMoto user's favourites were registered to their machine, now they are registered to the user so whenever they sign into the system the favourites will always be available.

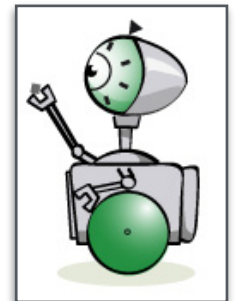
## DocMoto Web Client:

The DocMoto Web Client was designed to enable any business which required a third party to have constant access to their DocMoto system (who may not have a Mac).\* The DocMoto Web Client has been updated and now incorporates a lot more functions from the native Mac Client. Functions now include:

- Create Folders – standard & template.
- Adding and importing single or multiple files.
- Full revision control.
- Adherence to tag rules including folder based rules such as mandatory or preferred folder.
- Simple searching of files and folders (name and content).
- Advanced searching of files and folders (name, content and tags).
- Simple accessible editable list of favourite locations within the DocMoto repository.
- Full support for an editable list of user defined views on the repository.
- Full audit information including version history.

The DocMoto Web Client enforces standard authentication methods and ensures all communications \*are SSL encrypted.

**Movie Bot:** “If the DocMoto Web Client is going to be used for third party access then a CA signed certificate will be required. DocMoto is shipped with a self-signed certificate which will ensure 256 bit encryption, however external users signing into the system would receive a message that the certificate is not recognised.”

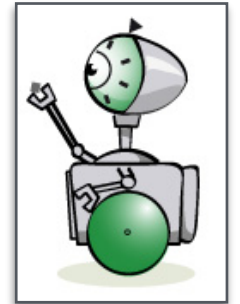


The following sections are examples of functions available within the DocMoto Web Client.

## Example DocMoto Web Client – Favourites:

The screenshot shows the DocMoto Web Client interface. At the top, there is a green header with the 'docmoto' logo on the left and 'Logged in as : lee' and 'Logout' on the right. Below the header is a search bar with a 'Go' button and a heart icon. A dropdown menu is open from the heart icon, listing several folders: 'Active Projects', 'Alpha - Project', 'Davidson, David', 'Doc Assembly -...', 'Images', and 'Test Folder'. On the left side, there is a sidebar with a 'DocMoto' tab and a menu with options: 'View in Browser', 'Add to Favourites', 'Download to View', and 'Check Out to Edit'. The main content area shows a green bar with 'DocMoto' and a list of folders: 'Contents', 'Home', and 'Trash'. A green arrow points from the 'Add to Favourites' menu item to the heart icon in the search bar. Another green arrow points from the 'Davidson, David' folder in the dropdown menu to the 'Add to Favourites' menu item.

**Motie Bot:** “You can find your list of favourite DocMoto folders and files by selecting the heart icon. To remove an item from the list, select the “X” icon to the right of the listed favourite. To add a favourite to the list, navigate and select the item within the DocMoto Web Client interface and select the “**Add to Favourites**” menu item.”



## Example DocMoto Web Client – Folder Creation:

docmoto

Logged in as : lee Logout

Go

View in Browser

Add to Favourites

Download to View

Check Out to Edit

Cancel Check Out

Check In

Add File

Move to Trash

Details

History

Create Folder

< A - D

Your location: Contents

**Create Folder**

Folder Name  
Davidson vs Smith

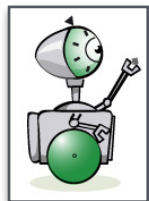
Template Name  
New Litigation Matter

Create Folder Close

<input type="checkbox"/>	Name	Template Name	Matter ID	Checked In On
<input type="checkbox"/>	1. Client Area			June 29, 2015
<input type="checkbox"/>	2. General			June 29, 2015

**Motie Bot:** "All views within the DocMoto Web Client adhere to the column rules set within the system. In this example, we can see "Template Name" and "Matter ID" have been set as columns. Folders also adhere to any tag rules set. In this example, a mandatory folder name tag has been set so users will only create folders set by the rule."

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**Motie Bot:** "Don't forget template place holders can create and auto populate tags."

<input type="checkbox"/>	Davidson vs Smith	New Litigation Matter	Davidson vs Smith - 24-Oct-2016_11:54:04	Today, 10:54:03
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## Example DocMoto Web Client – Add File:

This illustrates a user uploading (importing) a document into one of the newly (automatically) created folders from the previous “Folder Creation” example, specifically the folder “Court, Tribunal Docs” – created by the template “New Litigation Matter”. As well as the folder “Court, Tribunal Docs” being automatically created, tag rules have also been auto created and assigned to the folder, specifically “Court Doc Type” & “Status”.

docmoto

Logged in as : lee Logout

Select this option to browse your operating systems files.

DocMoto

View in Browser

Add to Favourites

Download to View

Check Out to Edit

Cancel Check Out

Check In

Add File

Move to Trash

Davidson vs Smith

Your location: Contents >

Your location: Contents > Legal > Clients > A - D > Davidson, David > Davidson vs Smith > Court, Tribunal Docs

Choose File(s) Sample Doc.docx

Court Doc Type

Pleadings

Status

Draft

Comment

Sample document upload for demonstration purposes only.

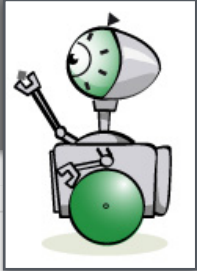
Add Files Close

Location to import into the DocMoto system.

Motie Bot: “A few well chosen tags will assist users categorise documents on import. This is especially true when the tag is based on the businesses taxonomy. Thus making documents easier for other users to find.”

Motie Bot: “Don’t forget columns can be set to reflect tag(s) and value(s).”

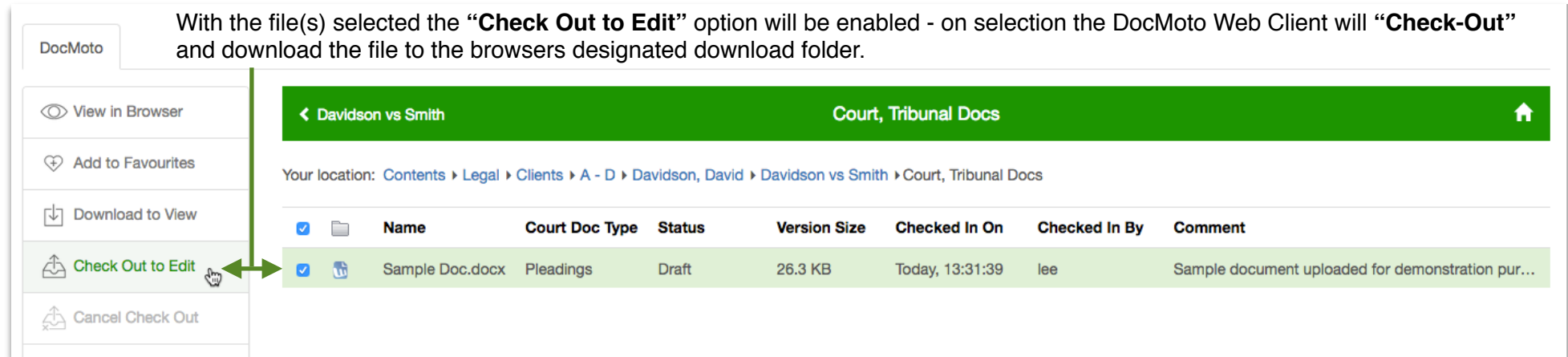
<input type="checkbox"/>	Name	Court Doc Type	Status	Version	Size	Checked In On	Checked In By	Comment
<input type="checkbox"/>	Sample Doc.docx	Pleadings	Draft		26.3 KB	Today, 13:31:39	lee	Sample document uploaded for demonstration pur...



## Example DocMoto Web Client – Check Out/In:

This example illustrates a user “**Checking Out**” and subsequently “**Checking In**” a document.

With the file(s) selected the “**Check Out to Edit**” option will be enabled - on selection the DocMoto Web Client will “**Check-Out**” and download the file to the browsers designated download folder.



The screenshot shows the DocMoto Web Client interface. On the left, a sidebar contains several options: 'View in Browser', 'Add to Favourites', 'Download to View', 'Check Out to Edit' (highlighted with a green arrow), and 'Cancel Check Out'. The main content area displays a breadcrumb trail: 'Davidson vs Smith' > 'Court, Tribunal Docs'. Below this, the 'Your location' is shown as 'Contents > Legal > Clients > A - D > Davidson, David > Davidson vs Smith > Court, Tribunal Docs'. A table lists documents with columns: Name, Court Doc Type, Status, Version Size, Checked In On, Checked In By, and Comment. The table contains one row: 'Sample Doc.docx', 'Pleadings', 'Draft', '26.3 KB', 'Today, 13:31:39', 'lee', and 'Sample document uploaded for demonstration pur...'. A green arrow points from the 'Check Out to Edit' option in the sidebar to the 'Sample Doc.docx' row in the table.

<input checked="" type="checkbox"/>	Name	Court Doc Type	Status	Version Size	Checked In On	Checked In By	Comment
<input checked="" type="checkbox"/>	Sample Doc.docx	Pleadings	Draft	26.3 KB	Today, 13:31:39	lee	Sample document uploaded for demonstration pur...

Navigate to the downloads folder for the “**Checked Out**” document. Open and amend as necessary.

With the file(s) selected the “**Check In**” option will be enabled - on selection the DocMoto Web Client will prompt the user to navigate to file downloaded in the last step (above) and “**Check-In**” the amended file.



The screenshot shows the DocMoto Web Client interface. On the left, a sidebar contains several options: 'View in Browser', 'Add to Favourites', 'Download to View', 'Check Out to Edit', 'Cancel Check Out', and 'Check In' (highlighted with a green arrow). The main content area displays a breadcrumb trail: 'Davidson vs Smith' > 'Court, Tribunal Docs'. Below this, the 'Your location' is shown as 'Contents > Legal > Clients > A - D > Davidson, David > Davidson vs Smith > Court, Tribunal Docs'. A table lists documents with columns: Name, Court Doc Type, Status, Version Size, Checked In On, Checked In By, and Comment. The table contains one row: 'Sample Doc.docx', 'Pleadings', 'Draft', '26.3 KB', 'Today, 13:31:39', 'lee', and 'Sample document uploaded for demonstration pur...'. A green arrow points from the 'Check In' option in the sidebar to the 'Sample Doc.docx' row in the table.

<input checked="" type="checkbox"/>	Name	Court Doc Type	Status	Version Size	Checked In On	Checked In By	Comment
<input checked="" type="checkbox"/>	Sample Doc.docx	Pleadings	Draft	26.3 KB	Today, 13:31:39	lee	Sample document uploaded for demonstration pur...

docmoto

Logged in as : lee Logout

Select this option to browse your operating systems files to locate the amended file.

DocMoto

View in Browser

Add to Favourites

Download to View

Check Out to Edit

Cancel Check Out

Check In

Add File

Move to Trash

Davidson vs Smith

Your location: Contents

Name

Sample Doc

Check In

Close

Sample Doc.docx

Court Doc Type

Pleadings

Status

Draft

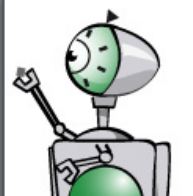
Comment

Sample document amended for demonstration purposes only.

Document to "Check In".

Start here.

**Motie Bot:** "Some tags should not be subject to change. In this example, the "Court Doc Type" should not be subject to change. However, the "Status" of the file could change and inserting a "Comment" can help other users get an overview of the version history.



Once the file has been "Checked In" the user can check the "History" of a the file.

Add File

Move to Trash

Details

History

Davidson vs Smith

Court, Tribunal Docs

Your location: Contents > Legal > Clients > A - D > Davidson, David > Davidson vs Smith > Court, Tribunal Docs

	Name	Court Doc Type	Status	Version Size	Checked In On	Checked In By	Comment
<input checked="" type="checkbox"/>	Sample Doc.docx	Pleadings	Draft	26.8 KB	Yesterday, 14:5...	lee	Sample document amended for demonstration pur...

On selection of the “**History**” menu option, the DocMoto Web Client will post a history dialog illustrating the number of versions of a document.

History for **Sample Doc.docx**

<input type="checkbox"/>	<input type="checkbox"/>	Version Name	Court Doc Type	Status	Version Size	Checked In On	Checked In By	Comment
<input type="checkbox"/>		1	Pleadings	Draft	26.3 KB	Yesterday, 13:31:39	lee	Sample document uploaded for demonstration purposes only.
<input type="checkbox"/>		2	Pleadings	Draft	26.8 KB	Yesterday, 14:52:06	lee	Sample document amended for demonstration purposes only.

Version listing where the latest number is the latest version.

History dialog retains the same column views as the main view.

Comment field reflects the changes made to the file, giving a full chronological history.

On selection of the “**Details**” menu option, the DocMoto Web Client displays a detail dialog illustrating the meta-data (audit information) associated to the document.

Move to Trash

**Details**

History

Create Folder

Davidson vs Smith Court, Tribunal Docs

Your location: [Contents](#) > [Legal](#) > [Clients](#) > [A - D](#) > [Davidson, David](#) > [Davidson vs Smith](#) > Court, Tribunal Docs

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Name	Court Doc Type	Status	Version Size	Checked In On	Checked In By	Comment
<input checked="" type="checkbox"/>		Sample Doc.docx	Pleadings	Draft	26.8 KB	Yesterday, 14:5...	lee	Sample document amended for demonstration pur...

An example “**Details**” dialog can be seen below.

docmoto Logged In as : lee Logout

### Details for Sample Doc.docx

Name : Sample Doc.docx

Version Name : 2

Application : Microsoft Macintosh Word

CharactersWithSpaces : 107

Status : Draft

Checked Out Date : Yesterday, 14:24:40

Document ID : 3DE996E6-6754-47CE-8F19-88D4F4F719D8

File Last Modified : Yesterday, 14:52:03

DocSecurity : None

FileAccessDateTime : 2016:10:24 15:52:03+01:00

FileInodeChangeDateTime 2016:10:24 15:52:04+01:00

:

File Size : 27 kB

File Type : DOCX

FileTypeExtension : docx

SharedDoc : No

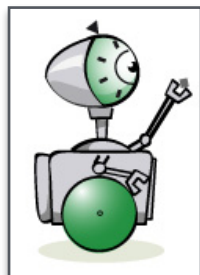
Checked Out By :

**Audit**

Version Size : 26.8 KB

Close

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**Motie Bot:** “The meta-data stored within DocMoto is obtained from the following: (1) embedded into the file by the source (such as “**Author**” in MS Word, Apple Pages, etc) (2) Operating System such as “**File Last Modified**” (3) DocMoto – created within the system such as “**Court Doc Type**” used within the example. This information can be further utilised by DocMoto’s Reports & Search routines.”

## Example DocMoto Web Client – Searching:

The DocMoto Web Client has a multi purpose search engine enabling users to conduct simple or advanced searches. The first example (section) will deal with simple searches.

**docmoto** Logged in as : lee Logout

**Motie Bot:** “If the user selects the “Go” button instead of selecting an item from the list, DocMoto will issue a search with the following criteria – match any (1) folder (2) file (3) content where the term “agree” exists.

DocMoto

View in Browser  
Add to Favourites  
Download to View  
Check Out to Edit  
Cancel Check Out  
Check In  
Add File  
Move to Trash  
Details  
History  
Create Folder

**Contents**

Your location: Contents

<input type="checkbox"/>	Name	Version	Size	Checked In On	Created By	Comment
<input type="checkbox"/>	Admin			February 27, 2015	lee	
<input type="checkbox"/>	Assembly			April 23, 2015	lee	
<input type="checkbox"/>	CHL Software			February 27, 2015	lee	
<input type="checkbox"/>	Contracts			February 27, 2015	lee	
<input type="checkbox"/>	Hidden Folder			December 1, 2015	lee	
<input type="checkbox"/>	Legal			February 27, 2015	lee	
<input type="checkbox"/>	Monitored Folders			February 27, 2015	lee	
<input type="checkbox"/>	OCR Inbox			September 14, 2015	lee	
<input type="checkbox"/>	Projects			February 27, 2015	lee	
<input type="checkbox"/>	Signature Required			April 9, 2015	lee	

agree Go

- Agreement 1A.docx
- Agreements
- Company Agreement.docx
- Confidentiality Agreement.docx
- DocMoto Cloud Licence Agreement - UK.pdf
- DocMoto Cloud Licence Agreement - US.docx
- Fee Agreement.docx
- Mutual Non-Disclosure Agreement.docx

**Motie Bot:** “DocMoto will offer the user a predictive list of items matching the term used within the search engine. In this example, the term “agree” is used and the predictive list will have folders and files listed where the term is part of the name. The user can select one of the items from the list and DocMoto will match the result against that item.

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docmoto Logged in as : lee Logout

Workspace agree Go

DocMoto Q agree x

View in Browser  
Add to Favourites  
Download to View  
Check Out to Edit  
Cancel Check Out  
Check In  
Add File  
Move to Trash  
Details  
History  
Create Folder

**Search Results**

Search Results for **agree** in folder **Contents**

<input type="checkbox"/>	Name	Version Name	Version Size	File Last Modified	Created By	Comment
<input type="checkbox"/>	Agreement 1A.docx	1	27.4 KB	July 26, 2012	lee	Merged from desktop
<input type="checkbox"/>	Agreements				lee	
<input type="checkbox"/>	Agreements				lee	
<input type="checkbox"/>	Agreements				lee	
<input type="checkbox"/>	Agreements				lee	
<input type="checkbox"/>	Agreements				lee	
<input type="checkbox"/>	Company Agreement.docx	1	16.2 KB	October 1, 2014	lee	
<input type="checkbox"/>	Confidentiality Agreement.docx	2	114.2 KB	March 24, 2015	lee	
<input type="checkbox"/>	Confidentiality Agreement.docx	2	114.1 KB	March 24, 2015	lee	
<input type="checkbox"/>	Confidentiality Agreement.docx	1	114.1 KB	April 14, 2015	lee	

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When a user conducts a search (simple or advanced) the search results will be posted in a separate tab. This ensures easy navigation between work area and searches.

The search criteria and the location the search was run from.

Result set from search

The second example (section) will deal with more complex (advanced) searches.

Users have the option to AND/OR the search criteria

Search... Go



DocMoto agree

- View in Browser
- Add to Favourites
- Download to View
- Check Out to Edit

DocMoto

Your location: Contents

<input type="checkbox"/>	Folder	Name
<input type="checkbox"/>	Folder	Admin

**Advanced Search**  
Searching from: Contents

All conditions met:  Any conditions met:

court

- Court Doc Type
- {court\_details}

DocMoto's predictive search works when users type a tag name.

Add or remove criteria

Save

February 27, 2015 lee

Tag text list (taxonomy) auto populated according to tag.

Search... Go



DocMoto agree

- View in Browser
- Add to Favourites
- Download to View
- Check Out to Edit
- Cancel Check Out
- Check In
- Add File
- Move to Trash

DocMoto

Your location: Contents

<input type="checkbox"/>	Folder	Name
<input type="checkbox"/>	Folder	Admin
<input type="checkbox"/>	Folder	Assembly
<input type="checkbox"/>	Folder	CHL Software
<input type="checkbox"/>	Folder	Contracts
<input type="checkbox"/>	Folder	Hidden Folder
<input type="checkbox"/>	Folder	Legal

**Advanced Search**  
Searching from: Contents

All conditions met:  Any conditions met:

Court Doc Type

Is

More >

Clear Search

Condition automatically filled according to tag type.

Pleadings

- Select from the list
- Pleadings
- Offers to Settle
- Affidavits
- Exhibits
- Records
- Authorities
- Factum
- Request to Admit & Responses
- Other, Judgements, Settlements
- Other - Enter In Comments

Save

February 27, 2015 lee

April 23, 2015 lee

February 27, 2015 lee




February 27, 2015 lee

December 1, 2015 lee












February 27, 2015 lee



When a user conducts a search (simple or advanced) the search results will be posted in a separate tab. This ensures easy navigation between work area and searches.




Search... Go   

DocMoto  agree   Advanced Search 

-  View in Browser
-  Add to Favourites
-  Download to View
-  Check Out to Edit
-  Cancel Check Out
-  Check In
-  Add File
-  Move to Trash
-  Details
-  History
-  Create Folder

### Search Results

Search Results for in folder Contents

<input type="checkbox"/>		Name	Version Size	Comment	File Last Modified	Version Name	Created By	Court Doc Type
<input type="checkbox"/>		Application 1A.docx	27.4 KB		July 26, 2012	1	lee	Pleadings
<input type="checkbox"/>		Audit 1A.docx	26.9 KB	Reverted to V1.	July 26, 2012	3	lee	Pleadings
<input type="checkbox"/>		Authorities 1A.docx	27.4 KB		July 26, 2012	1	lee	Pleadings
<input type="checkbox"/>		DocumentMgt proc...	8.9 MB		November 28, 2012	1	lee	Pleadings
<input type="checkbox"/>		Legal - Read Me.d...	991 KB		December 18, 2015	1	lee	Pleadings
<input type="checkbox"/>		ploppy.docx	84.6 KB		July 4, 2012	2	lee	Pleadings
<input type="checkbox"/>		Sample Doc.docx	26.8 KB	Sample document ...	Yesterday, 14:52:03	2	lee	Pleadings
<input type="checkbox"/>		Wonderfish v Cindi...	27.3 KB		August 5, 2013	1	lee	Pleadings

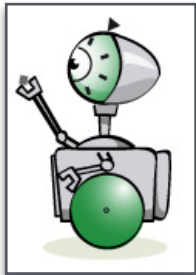
Result set from search.

All documents returned are tagged as **“Pleadings”** under the **“Court Doc Type”** tag.

There is a very good chance the result set will be large when searching using one criteria. The next example (section) will illustrate refining a search.

DocMoto's predictive search works when users type a tag name.

Additional criteria added to advanced search.



**Movie Bot:** "DocMoto knows the type of tag loaded as criteria and subsequently selects a pre-condition to match the tag. In this example, "Court Doc Type" is a text list (taxonomy) so the pre-condition will be the "Is" condition as it has to be one of the items listed. Whereas the "Matter ID" is a variable text field (keyword) so the pre-condition can be: (a) "Starts With" (b) "Ends With" (c) "Equals" (d) "Contains".

### Advanced Search

Searching from: Contents

All conditions met:  Any conditions met:

Court Doc Type  Is  Pleadings

Matter ID  Contains  Davidson

More

Complete refined search with additional criteria - "Matter ID" contains "Davidson". The search will now list all documents marked as "Pleadings" which belong to the "Matter ID".

When a user conducts a search (simple or advanced) the search results will be displayed in a separate tab. This ensures easy navigation between work area and searches.

docmoto
Logged in as : lee [Logout](#)

Search...
Go
🔍
❤️
🖼️

DocMoto

🔍 agree ✕

🔍 Advanced Search ✕

Search Results

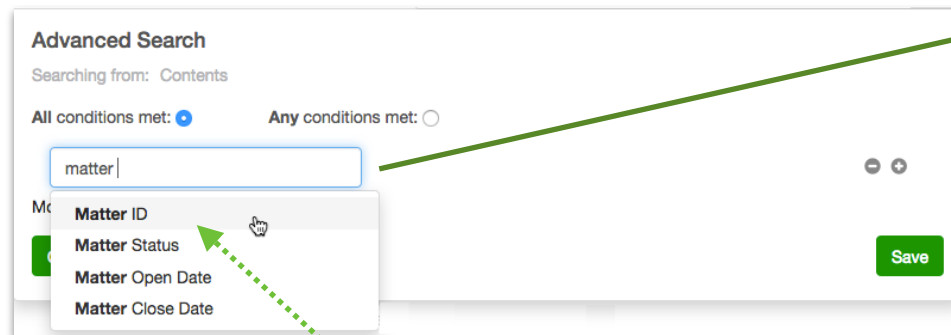
Search Results for in folder Contents

	Name	Version Size	Comment	File Last Modified	Version Name	Created By
<input type="checkbox"/>	Sample Doc.docx	26.8 KB	Sample document amended for demonstration purpo...	Yesterday, 14:52:03	2	lee

Result set from search. Refined search narrows result set from 8 documents to 1.

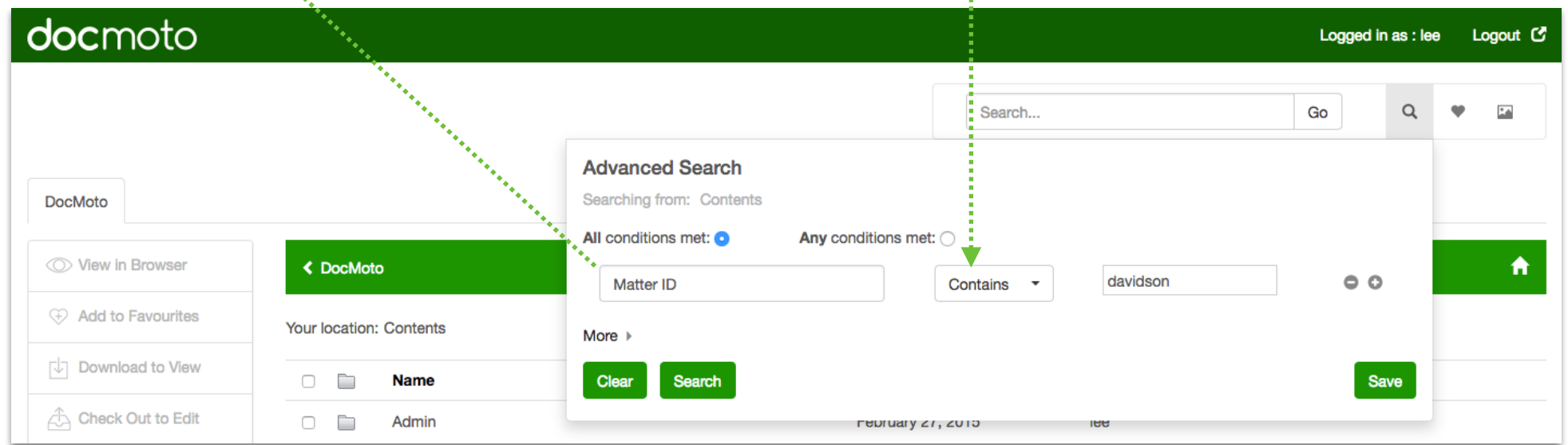
## Example DocMoto Web Client – Views:

This example (section) illustrates the DocMoto Web Client’s take on “**Views**”. The DocMoto Mac Client example earlier in this document dealt with creating a global view (available to all users) on documents “**Checked Out**” of the system and by whom. This example will be based on a “**View**” created for an individual to list all items relating to a matter (using the same folder tag “**Matter ID**” used in the previous search example).



DocMoto’s predictive search works when users type a tag name. “**Matter ID**” is a folder tag assigned to the parent folder to facilitate inheritance – more on this later.

DocMoto knows the type of tag loaded as criteria and subsequently selects a pre-condition to match the tag.



Folder templates can incorporate IDs automatically within the structure and through dynamic inheritance all items inherit the ID allowing users to pull all information relating to a particular structure (i.e. client details, project details, etc). In this example, a folder template created a predefined hierarchical folder structure with business rules applied, i.e. folder & document tags, permissions, column views even automatic document creation. The parent folder **“Davidson vs Smith”** has a folder tag **“Matter ID”** automatically created and populated via some business rules. Subsequently, a search against the **“Matter ID”** has listed all items belonging to this matter in one convenient view.

DocMoto
Advanced Search ✕

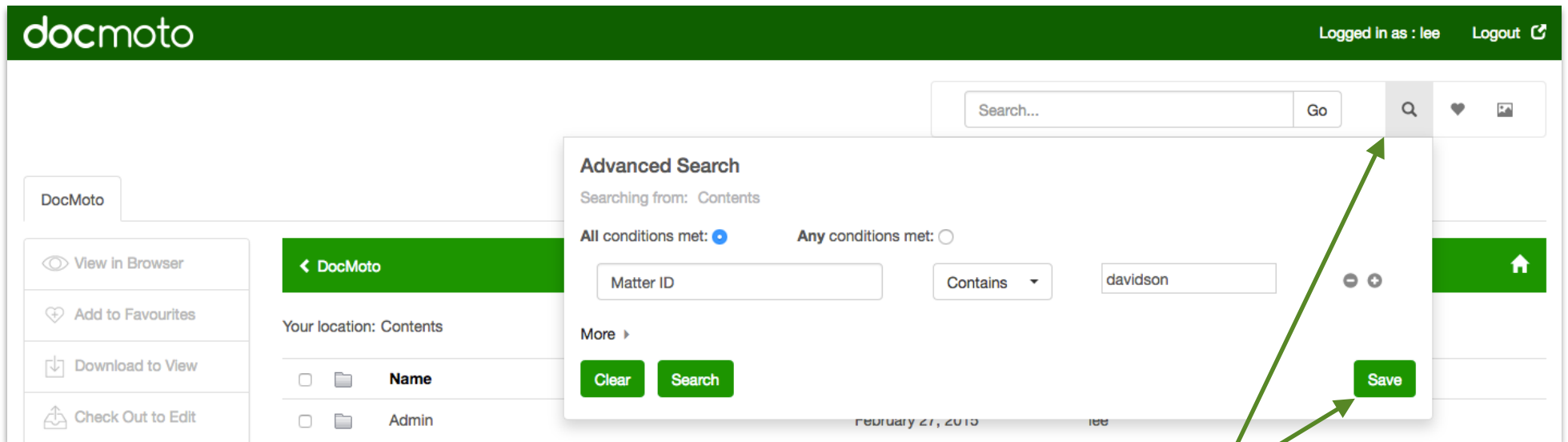
- 👁 View in Browser
- ♥ Add to Favourites
- ↓ Download to View
- 📁 Check Out to Edit
- 📁 Cancel Check Out
- 📁 Check In
- ➕ Add File
- 🗑 Move to Trash
- ℹ Details
- 🕒 History
- 📁 Create Folder
- 🔍 Go to Folder

Search Results

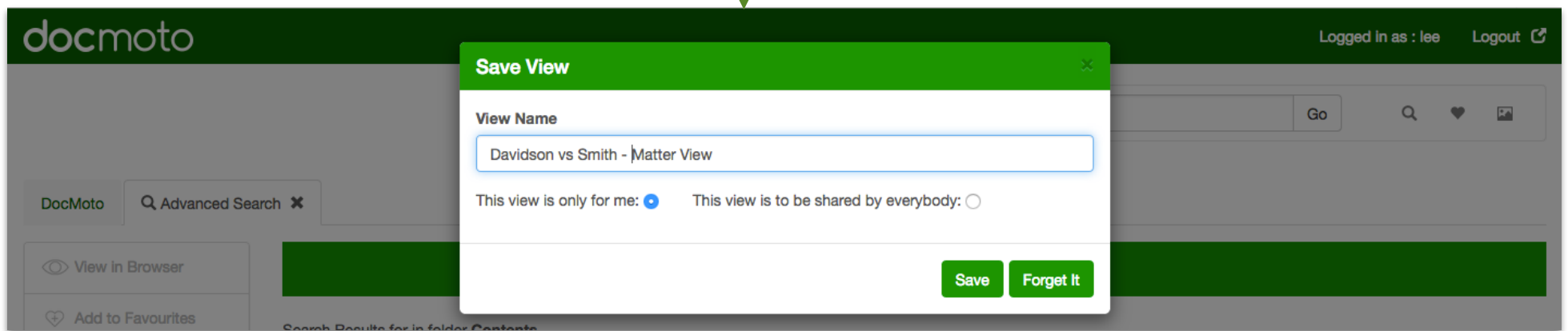
Search Results for in folder **Contents**

	<input type="checkbox"/>	Name	Version Size	Comment	File Last Modified	Version Name	Created By
	<input type="checkbox"/>	Accounting					lee
	<input type="checkbox"/>	Correspondence					lee
	<input type="checkbox"/>	Court, Tribunal Docs					lee
	<input type="checkbox"/>	Davidson vs Smith					lee
	<input type="checkbox"/>	Davidson vs Smith - Invoice.docx	85.4 KB				lee
	<input type="checkbox"/>	Draft					lee
	<input type="checkbox"/>	Emails					lee
	<input type="checkbox"/>	Final					lee
	<input type="checkbox"/>	Notes & Internal Memos					lee
	<input type="checkbox"/>	Productions & Client Docs					lee
	<input type="checkbox"/>	Sample Doc.docx	26.8 KB	Sample document amende...	Mon Oct 24 14:52:03 2016	2	lee

Template definitions may include some keywords. In the Template Manager they can be typed into the value of the folder tag. Keywords are in the format `@{name:params}` where name is the keyword and params are optional parameters. Keywords are case insensitive, so you can type `@{FolderName}` or `@{FOLDERNAME}` or `@{foldername}` which all mean the same.



By selecting the magnifying glass the user can check the criteria before saving it as a view. Once the save button is selected the user will be presented a dialog allowing them to: (a) name the view (b) give the view scope i.e. is the view particular to the user OR is it for the whole group.



The view has been created, saved and available to the user to get a 'realtime' view according to the criteria set in the original search.

The screenshot shows the DocMoto web interface. At the top, there is a green header with the 'docmoto' logo on the left and 'Logged in as : lee' and 'Logout' on the right. Below the header is a search bar with 'Search...' and a 'Go' button. On the left side, there is a sidebar with a 'DocMoto' tab and several action buttons: 'View in Browser', 'Add to Favourites', 'Download to View', 'Check Out to Edit', and 'Cancel Check Out'. The main content area has a green header with a back arrow and 'DocMoto', and a sub-header 'Contents'. Below this, it says 'Your location: Contents'. A table with columns 'Name', 'Version Size', 'Checked In On', and 'Created By' is visible. A dropdown menu is open on the right side, showing a list of views: 'My Views', 'Checked Out to Me', 'Davidson vs Smith - M...', 'Files Created by Me - ...', 'My Documents to Revi...', 'My Files - This Week', 'My Incoming Documents', 'Shared Views', and 'Checked Out to Anyone'. A green arrow points from a text box below to the 'Shared Views' option in the dropdown menu.

	Name	Version Size	Checked In On	Created By
<input type="checkbox"/>	Admin		February 27, 2015	lee
<input type="checkbox"/>	Assembly		April 23, 2015	lee

Drop down selectable list of views. Views specific to the user and shared views for the group.

When a user requests a view, the view will be displayed in a separate tab and labelled with the view's name. This ensures easy navigation between work area, searches and views.

The screenshot shows the DocMoto web interface. At the top, the logo 'docmoto' is on the left, and 'Logged in as : lee' and 'Logout' are on the right. Below the header is a search bar with 'Search...' and a 'Go' button. A tab labeled 'DocMoto' is active, showing a search for 'Davidson vs Smith'. On the left is a sidebar with various actions like 'View in Browser', 'Add to Favourites', 'Download to View', etc. The main area displays 'Search Results' for the folder 'Contents'. A table lists search results with columns: Name, Version Size, Comment, File Last Modified, Version Name, and Created By. Two rows are circled in green: '01. Sample Doc.docx' and '02. Sample Doc.docx', both 26.3 KB, created by 'wayne' on March 3, 2015. Other folders like 'Accounting', 'Correspondence', 'Court, Tribunal Docs', 'Davidson vs Smith', 'Draft', 'Emails', and 'Final' are also listed. A green arrow points from the text above to the search bar, and another points from the text below to the circled rows.

	Name	Version Size	Comment	File Last Modified	Version Name	Created By
<input type="checkbox"/>	01. Sample Doc.docx	26.3 KB		March 3, 2015	1	wayne
<input type="checkbox"/>	02. Sample Doc.docx	26.3 KB		March 3, 2015	1	wayne
<input type="checkbox"/>	Accounting					lee
<input type="checkbox"/>	Correspondence					lee
<input type="checkbox"/>	Court, Tribunal Docs					lee
<input type="checkbox"/>	Davidson vs Smith					lee
<input type="checkbox"/>	Davidson vs Smith - Inv...	85.4 KB		March 30, 2015	1	lee
<input type="checkbox"/>	Draft					lee
<input type="checkbox"/>	Emails					lee
<input type="checkbox"/>	Final					lee

Since the view was created a user “Wayne” has imported two additional documents (01. Sample Doc.docx & 02. Sample Doc.docx) into the client matter “Davidson vs Smith”. The results from the view illustrate its realtime capabilities - every item in one view at any time.



