



User Help

Fabasoft App

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1 Fabasoft App

The Fabasoft App is available for devices running on [Android](#) or [iOS](#).

The app for Android devices can be downloaded from [Google Play Store](#). It is recommended to use the most current Android version but the app supports devices with Android 8.0 or later.

The app for iOS devices can be downloaded from [Apple App Store](#). It is recommended to use the most current iOS version but the app supports devices with iOS 12.2 or later.

The apps are optimized for their respective platforms in order to provide the best user experience on each operating system. This results in a number of differences which are detailed in each chapter.

Note: The settings defined in the Fabasoft App may also be applied by your mobile device management.

For further information, please visit:

<https://help.folio.fabasoft.com/index.php?topic=doc/Mobile-Device-Management/index.htm>

2 Introduction

The Fabasoft app gives you access to your company's business documents stored in the Fabasoft eGov-Suite or Fabasoft Folio. Wherever and whenever, securely and reliably.

The Fabasoft App allows you to:

- Access your Teamrooms, folders, and documents quickly and easily.
- Read, open, edit, and swipe between documents.
- Open documents and videos on your device either directly or with integrated apps – even in offline mode.
- Upload images, music, and videos from your libraries, or files from the file system, and from other apps – even multiple files at once.
- Synchronize your Teamrooms, folders, and documents and access them in offline mode without using the internet.
- Refresh all of the documents, folders, and Teamrooms that you want to access in offline mode with a single tap.
- Use LAN synchronization to download documents from other devices on the same network.
- Search for data in all your documents for which you have access rights.
- Create new Teamrooms, and invite contacts to Teamrooms.
- E-mail links to documents, and e-mail documents as attachments.
- Display documents in full-screen mode.
- Access your worklist quickly and easily, including your tracking list.
- Sort the different lists on your worklist by date, activity type, or object - in ascending or descending order.
- Execute work items such as "Approve" or "Release" documents, and other objects.
- Interact with activities from your worklist on your Apple Watch (iOS only).
- Authenticate via the following methods: user name/password (basic authentication), client certificates, or Single-Sign-On with SAML. If your Folio installation has authentication via client

certificates enabled, you must import your personal client certificate into the Fabasoft Folio app (e.g. by using Apple iTunes). In case of a permanent login, the device is bound to your account using cryptographic methods.

Note: To use the worklist, you will need at least Fabasoft Folio 2016 or Fabasoft eGov-Suite 2016. Moreover, your processes must be prepared so that they can be used in the app.

Fabasoft Folio encompasses the creation, organization, and storage of business documents, as well as the informal and structured collaboration within your company.

For more information about Fabasoft Folio, please visit <https://www.fabasoft.com/folio>.

3 Starting the Fabasoft App

App Permissions

The Fabasoft App requires certain app permissions for particular actions. When the app tries to execute such functions, a dialog is displayed by the operating system to provide access.

- Android
 - Storage: For monitoring a file while editing.
 - Contacts: For inviting contacts to a Teamroom.
 - Location: For restricting the LAN Synchronization feature to particular Wi-Fi networks.
- iOS
 - Camera: For importing videos or photos directly from the camera.
 - Photos: For importing videos and photos from your photo library.
 - Contacts: For inviting contacts to a Teamroom.
 - Location Services: For restricting the LAN Synchronization feature to particular Wi-Fi networks.

3.1 App Passcode

The Fabasoft App must be secured with an app passcode. The additional app passcode is an extra layer of security in order to protect the data stored on your device. If you switch the app to background for more than 15 seconds, or keep it open for more than 3 minutes without interaction, the app will be automatically locked. In order to unlock the app, you must identify yourself via the app passcode or biometric identification. The app code must consist of at least six digits.

If the passcode is entered incorrectly 5 times, all data in the app will be erased.

In case the dialog for biometric identification is accidentally closed, you can reopen it via the biometric ID button at the bottom left.

Login

The following login methods are supported by the Fabasoft app (dependent upon the respective Fabasoft Folio or Fabasoft eGov-Suite installation).

- Username and password (basic authentication)
- Client Certificates installed in the app
- Single Sign-on using a SAML 2.0 identity provider

To log into the Fabasoft app, proceed as follows:

1. Install and open the app.
2. Define an app passcode by entering a pin with at least six digits on the "Activate Passcode Lock" pop-up.
3. Re-enter the passcode.
4. Optionally, you can also define to unlock the app via biometric Identification.
5. Enter the URL of your Fabasoft Folio or Fabasoft eGov-Suite installation.
6. Select the login method supported by your installation.
7. Next you will see a "Login" button with a checkbox labelled "Stay logged in". By leaving the checkbox checked you will only be asked for your login data once and you are logged in permanently.

Note: When using permanent login with Single-Sign-on on an iOS device, there will be another pop-up, so tap "Continue".

Note: The backend URL and the available login methods are definable via Mobile Device Management.

For further information please visit:

<https://help.folio.fabasoft.com/index.php?topic=doc/Mobile-Device-Management/index.htm>

Authentication with Client Certificates

The Fabasoft App supports authentication with client certificates. On Android devices, the client certificates stored on the device in the systems key store can be used.

On iOS, apps are not allowed to access the system key chain to get access to globally deployed certificates. However, if required, it is possible to import a client certificate into the app. This can be done either by importing a PKCS#12 file into the Fabasoft App using App File Sharing in iTunes, or by opening a file with the extension `pdf.fabasoft` in the Fabasoft App using the "Open in" feature of another app. The certificate file must include the private key so that it can be used for authentication. The certificate is securely stored in the key chain of the device.

However, when you use the permanent login feature (activate "Stay logged in" on the login page) with the "Single Sign-On" login method (using a SAML identity provider; requires Fabasoft Folio 2020 Update Rollup 2 or later as backend system), the authentication is delegated to a Safari web view which has access to the system key chain as well. In general, mobile device management software allows to distribute client certificates that can be used in Safari. In this case, the client certificate does not need be stored in the context of the Fabasoft App.

Note: The worklist on the Apple Watch does not support authentication with client certificates.

3.2 App Shortcuts

When performing a long tap on the app icon on the home screen of your device, you can directly navigate to "Worklist", "Favorites", or "Search".

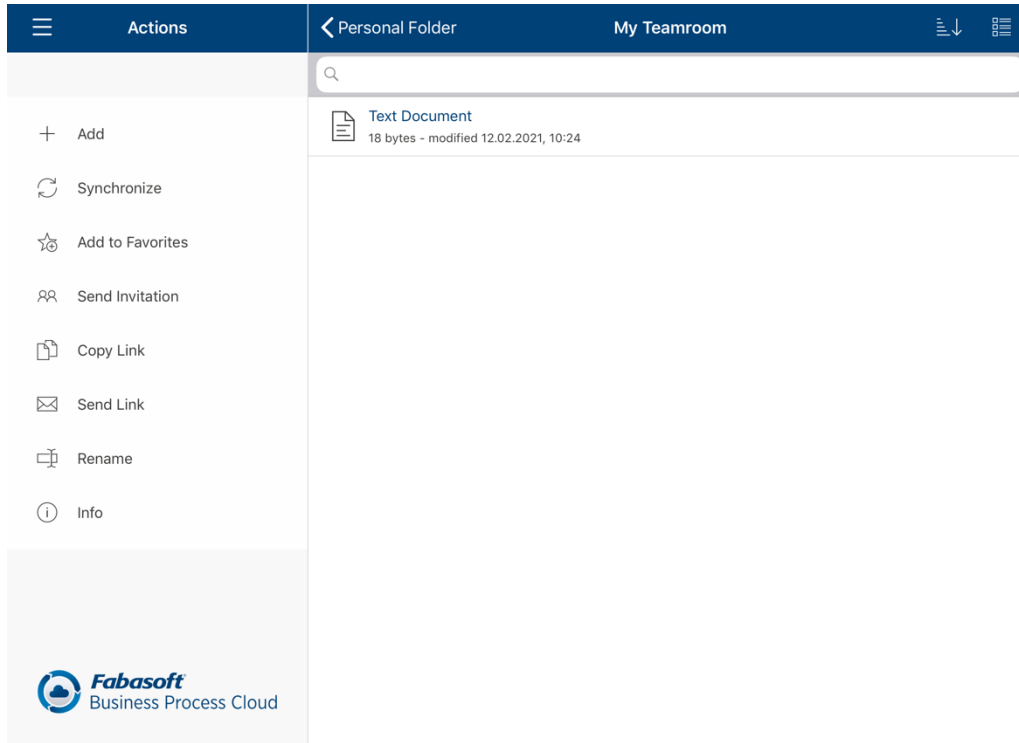
4 User Interface

The responsive and accessible user interface is divided into the following areas:

- **Title bar**
Includes the buttons “Navigation” and “Back” and other action buttons on the right side of the title bar.
- **Navigation menu**
Provides direct access to your worklist, synchronized objects, favorites, setting, etc.
- **Search bar**
Allows you to Filter the current list or to search for objects.
- **Action panel**
Allows you to execute actions on the currently displayed object. It is visible below the content area (on phones in portrait mode) or to the left of the content area (on tablets or phones in landscape mode).
The names of the actions in the action panel are only displayed on tablets in landscape mode. Perform a long tap on an action button to display a pop-up with the name of this action.
Note: If the buttons for all available actions do not fit into the action panel, find the additional “More Actions” button. Tap it to see all other actions in a pop-up menu.
- **Content area**
Displays either a list of objects or a preview of documents.

Note:

- In contrast to the web client the app prefers the language configured on the device for translated texts, as long as the language is supported by the server.
- In order to view the navigation menu, it is necessary to swipe from the far left of your device to the right. Alternatively, tap the “Navigation” button on the top left of the title bar.



5 Navigation

Find the navigation by swiping from the far left to the right. In the navigation menu, you can see the following options:

- Home
Click this entry to navigate back to the Fabasoft Folio or Fabasoft eGov-Suite home.
- Synchronization
Displays all synchronized data that you can access in offline mode.
- Worklist
Displays all activities that are to be completed, listed for individual users in the form of a "To Do" list.
- Favorites
Displays objects that you need repeatedly.
- Search
Displays the search portal.
- Data Transfer
Displays the current progress of uploads, downloads, and synchronized data.
- Settings
For more information, see chapter 18 "Settings".
- Logout

6 Home

The home screen is your starting point to the Fabasoft App. You find a number of widgets and dashboards most of which are identical to the ones in the web client.

On Android, you can change the view of the home screen by tapping "Change View" in the title bar. You can choose between a card view or a list view.

The following widgets are initially available to you, depending on the licensed Fabasoft Edition and the configuration of your organization:

Personal Folder:

- Stores Teamrooms and other objects that are important for you.

Organization Folder:

- Contains all standard Teamrooms of your organizations in which you are authorized.

Teamrooms Shared With Me:

- Contains all Teamrooms in which you are authorized as a team member. Teamrooms that you have created yourself are excluded from this list. For a better overview, the list is structured by date.

Favorites:

- Displays objects that you need repeatedly.

Worklist:

- Displays all activities that are to be completed, listed for individual users in the form of a "To Do" list.

Search:

- Displays the search portal.

Follow-Ups:

- Contains your follow-ups that fall within the period you defined.

Other Dashboards:

- Apps that offer their own dashboards are also displayed directly on “Home”.

Note:

- The logo in the top right corner of the navigation menu is a shortcut to go back to “Home”.
- On tablets, the logo at the bottom of the action panel is a shortcut to go back to “Home”.
- In contrast to the web client, the widgets “Worklist”, “Favorites” and “Search” are shortcuts to the respective entries in the navigation menu.

7 Navigating in Lists

The name of your current location is displayed in the title bar. For navigating back, the “Back” button in the title bar can be used. Each list in the navigation menu has its own navigation stack.

7.1 Sorting Objects

The sorting of objects in a list can be easily adapted by tapping the “Sort” button in the right part of the title bar. You can sort objects depending on various criteria. Change the sort order by tapping the menu option another time. The current order of sorting is indicated via an arrow symbol.

The types of sorting options are:

- Name
- Last Change on/at
- No Sorting (Displays documents in the order that they are stored on the server)
- Default Sorting (iOS only)

Note: On iOS, the default sorting method is defined by the backend object model. On Android it can be changed in the settings; see chapter 18.3 “Sorting (Android Only)”.

7.2 Changing a View

Teamrooms and folders display the objects contained within them in the content area. The type of view can be changed via the “Change View” button in the right section of the title bar.

List

The list view is selected by default. It displays the most important information on the objects.

Thumbnails

In the thumbnails view, you can find the name and the preview of the object. For documents, the first page is displayed.

7.3 Filtering a List

By using the search bar, you can easily filter by name. Just enter text without starting a search to filter the list.

8 Creating Teamrooms

Teamrooms can be created directly e.g. in your personal folder or within a folder. In contrast to the web client, In order to create a new Teamroom in the app, proceed as follows:

1. Navigate into your personal folder or selected folder.
2. Tap "Add" in the action panel.
3. Select the "Teamroom" action in the pop-up "Folders".
4. Enter the name of your Teamroom into the "Name" textbox and tap the "Create" button.

Invite Contacts

In order to invite Contacts to your Teamroom, proceed as follows:

1. Navigate into the desired Teamroom.
2. Tap "Send Invitation" in the action panel.
3. You can add users stored in the contact list on your device. In order to do so, you have to allow access to contacts for the Fabasoft App.
4. Enter the name of the user you want to send an invitation to and tap the icon of the user.
Note: On iOS, it is possible to select directly from contacts by tapping the "+" icon.
5. Tap the "Send" button.

9 Creating Folders

In order to create a folder, proceed as follows:

1. Navigate into your personal folder or desired Teamroom.
2. Tap "Add" in the action panel.
3. Select the "Folder" action.
4. Enter the name of your folder and tap the "Create" button.

Note: You can also create folders within folders.

10 Uploading Files

In order to upload a file from your mobile device, proceed as follows:

1. Navigate into the desired folder.
2. Tap "Add" in the action panel.
3. Select the "Browse" action.
4. Select the desired document from your device or navigate to it using the files app of your device.

In order to upload a photo or video from your mobile device, proceed as follows:

1. Navigate into the desired folder.
2. Tap “Add” in the action panel.
3. Select the “Take Photo” action or “Record Video” action.
4. Take your photo or record a video in a 3rd party app.

It is possible to paste HTML, plain text, and URLs into a folder or Teamroom from the pasteboard. Additionally, only on iOS, you can paste text in RTF format, pictures, and documents. In order to do so, proceed as follows:

1. Locate the relevant object on your device (e.g. a web page in Safari, a photo in the Photos app, a document in the Files app, etc.).
2. Copy the desired document, text, picture, or URL.
3. Navigate into the desired folder or Teamroom in the Fabasoft App.
4. Tap “Add” in the action panel.
5. Select the option “Paste” on iOS or the menu item “From Clipboard” on Android.
6. Enter the name of the document and tap “Paste”.

11 Previewing Documents

The Fabasoft App provides a preview of various document types.

- When the document is an image, a preview of the image is displayed.
- If a PDF view is available for the document type, the document is presented in the integrated PDF viewer.
- On iOS, documents of the types Apple Pages, Apple Numbers, and Apple Keynote will be displayed with the integrated viewer of iOS.
- On iOS, supported video and audio types can be played directly in the preview.
- If the document cannot be converted to PDF (e.g. due to an unsupported document type), only the icon of the corresponding object class will be displayed.
- The preview and overview functionalities both support pinch-to-zoom.
- The preview of a document can be switched to full screen-mode. In full screen-mode, all UI except the title bar is hidden.

Note: You can use the “Open in” action to view objects in apps on your device that support the corresponding document type.

11.1 Opening a Document

By pressing the “Open in” action, the original file is downloaded to be opened with any application that supports the document type.

The document is opened in read-only mode, but some third-party apps may allow editing.

11.2 Editing a Document (Android Only)

By pressing the “Edit in” action, the document is locked in the backend, so no other user can change the content while it is being edited on your device.

The original file is downloaded to be opened with any application that supports the document type.

When the third-party application properly saves the file back to the original location, the changes will automatically be uploaded to the backend. Be aware that some third-party applications do not support this, and rather try to store the file locally or elsewhere.

Note:

- Make sure that the used third-party application properly supports the Android File Provider.
- Microsoft apps on Android do not support the edit flag and will only provide the document in read-only mode.
- For more information about the Android File Provider, please visit <https://developer.android.com/reference/androidx/core/content/FileProvider>.

11.3 Editing a Text Document

For text documents, an in-place-editor is available.

By pressing the “Edit” action, the in-place-editor is opened. The document is locked, so no other user can change the content while it is being edited on your device.

The original file is downloaded and opened for in-place-editing.

The changes made by in-place-editing can be canceled or saved. By tapping the “Save” button, the document is uploaded automatically. When the upload is finished, the document is unlocked and the in-place-editor is closed. The preview is refreshed automatically.

11.4 PDF Viewer

The PDF Viewer provides the following features through buttons in the title bar:

- Search
- Content
- Thumbnail
- Open full screen mode

Moreover, a thumbnail bar is displayed at the bottom of the content view to navigate quickly to a particular page in the document.

Search

When pressing the “Search” button in the title bar, the search view is displayed. The search view contains a text input field and a result list.

The document is searched while typing in the input field and the result list is filled with the search results. The search results are highlighted directly in the document. By tapping on a search result in the list, the document scrolls to the page and the exact location of the search result.

The search can also be triggered by selecting a text in the viewer as well as by using the context menu action “Search”.

Content

When pressing the “Content” action, the content view is displayed. The content view displays the table of contents (when available), a list of bookmarks, and a list of annotations.

By tapping on an entry from either list, the document scrolls to the page and the exact location of the desired entry.

Thumbnail

When pressing the “Thumbnails” button, the thumbnail view is opened. The thumbnail view takes up the entire view and displays small thumbnails for regular pages, pages with annotations, or pages with bookmarks for easy and fast navigation.

By tapping on a thumbnail, the document scrolls to the desired page.

Thumbnail Bar and Scrollbar

A thumbnail bar is also available via a floating widget on the bottom of the PDF overview and can be made visible or hidden by pressing anywhere on the screen. By tapping an item from the thumbnail bar, the document scrolls to the desired page.

A scrollbar is available on the right side of the PDF viewer and can be shown or hidden by pressing anywhere on the screen. It is also shown when starting to scroll. The scrollbar handle can be used for easy and fast navigation.

12 Synchronizing and Offline Mode

You can synchronize objects to your device and use them offline.

12.1 Synchronizing an Object

By using the “Synchronize” action in Teamrooms or folders, you synchronize (i.e. copy) these objects, including their children, to your device so that they are made available offline.

Synchronizing one or multiple folders or Teamrooms may take some time, depending upon the number of objects and the size of the documents that need to be transferred to your device. Hence, a “Synchronization” dialog indicates the number of files and directories as well as the estimated size of the documents. If you agree to synchronize this amount of data, tap the “Start” button. Afterwards, a progress of the synchronization job is displayed in the “Data Transfers” section that can be accessed via the navigation menu. Tap the progress bar to open a detailed dialog for this synchronization job.

You can also cancel the job, either in the “Synchronization” dialog or via the “Cancel” button displayed when swiping from right to left on the progress list entry.

The synchronized objects can be accessed via the “Synchronization” list which can be found in the navigation menu. You can access the objects in these folders via the “Synchronization” list. To remove an entry from the list, tap the “Do not Synchronize” button which appears when you swipe from the right to left on said entry.

Note:

- During synchronization on iOS devices, the Fabasoft App must remain active in the foreground. Apple iOS does not support synchronization processes in background jobs.
- On Android devices, synchronization jobs are permitted in the background, so you can use other apps in the meantime.
- When synchronizing large amounts of data
 - connect your device to the power supply.
 - an iOS device does not go into stand-by-mode.
 - keep your device in a safe place.

- it is advisable to reduce screen brightness in order to protect the screen of your device from burn-in (image retention).
- If there are errors during the synchronization process, the app will retry downloading the data three more times at the end of the job.

These synchronized objects are also checked for updates on a regular basis.

12.2 Working Offline

If you want to work offline, switch to “Offline Mode” via the action in the navigation menu. In “Offline Mode”, there is no network access. Only previously synchronized data that is stored locally on your device is available.

Since there is no connection to the server, only a limited number of actions can be executed. For example, you can:

- Browse and view your folders and documents.
- Open documents in other apps.
- Add files from your device to existing folders and Teamrooms.
- Add objects to your favorites list.
- Copy and send links to objects.

Some important restrictions of the “Offline Mode” are:

- When searching for objects, only cached metadata can be searched. There is not full text search with Mindbreeze available.
- You cannot access your worklist.
- You do need to log in to your backend system in “Offline Mode” since you do not have access to the authentication service. Therefore, it is important to protect the access your data via the application passcode.

Note: The Fabasoft App can also handle a temporary loss of the network connection. In this case, only cached data is presented until a proper server connection can be re-established. Use “Offline Mode” in combination with your synchronized data if you have planned for periods of offline work. Only “Offline Mode” ensures that all your data is available on your device.

13 Favorites

Favorites allow you to quickly access objects that you need repeatedly.

The context-independent “Favorites” tool can be opened or closed via selection in the navigation menu. In order to remove an item from favorites, you can navigate into the favorites via the navigation menu and swiping the desired item from right to left, then tap the “Remove from Favorites” button. Alternatively, navigate to the desired object and tap “Remove from Favorites” in the action panel.

14 Worklist

In “Worklist”, all activities to be completed (= activities and the working steps to be carried out in it) are clearly listed for individual users in the form of a “To Do” list. Processes are used to define who is allocated which activities in their worklist and when.

14.1 Available Lists

The work list consists of the following lists (only visible if at least one entry is present):

- To Do
Contains the current activities that need to be done.
- To Do as Substitute
Contains the current activities that need to be done while in the role of a substitute.
- Suspended
Contains activities that are suspended for a defined time span.
- Suspended/Pending as Substitute
Contains activities that are suspended for a defined time span and need to be done while in the role of a substitute.
- Concerned Objects
Contains objects related to current activities.
- Last Finished
Contains completed activities.
- Tracking
Contains objects of already completed activities.

14.2 Previewing an Activity

When tapping an activity, the object behind the activity is displayed in the integrated viewer. In the action panel, the work items of the activity appear. Moreover, the actions of the object are presented in a hierarchical action entry.

If there is a folder behind the activity, the content list of the folder is visible by default. You can change this behavior in the menu "Settings" by activating the option "View Activities as PDF". In this case, the PDF rendition of the folder is displayed in the viewer.

14.3 Executing a Work Item

To execute a work item, proceed as follows:

1. Navigate into the worklist within the "To Do" list.
2. Tap the desired activity.
3. Find the available work items of the activity in the action panel.
4. Tap the entry in the action panel. Depending on the work item, the corresponding action is carried out (e.g. "Open" displays a document in the corresponding third-party product).
5. Moreover, the actions of the object are presented in a hierarchical action entry.

Note: You can perform a long tap on an action in order to see a pop-up displaying its name.

15 Various Functions and Actions

The following chapters describe various functions and actions.

15.1 Copying a Link

With the Fabasoft App, it is possible to copy a hyper link (URL) of an object to the clipboard or pasteboard. Proceed as follows:

1. Navigate to the object to which you want to receive a link.
2. Tap the “Copy Link” action.

15.2 Sending a Link

Opens your e-mail app with a hyperlink to the object in the body of the e-mail. In order to access the object via the link, the recipients must have a Fabasoft account as well read access on the object. To send a link to a Teamroom, folder, or document, proceed as follows:

1. Navigate to the desired Teamroom, folder, or document.
2. Tap the “Send Link” action.
3. Complete and send the e-mail using your preferred e-mail app.

15.3 Sending a File

Instead of sending a link to a document, you can send the document as a file attachment via e-mail. This action is only available for documents.

1. Navigate to the desired document.
2. Tap the “Send File” action.
3. Complete and send the e-mail using your preferred e-mail app.

15.4 Deleting an Object

You can delete or move an object to the wastebasket by the “Delete” action. To delete an object, proceed as follows:

1. Navigate to the desired folder or document.
2. Tap “Delete” from the action panel.
3. Confirm the deletion of the object.

or

1. In the list view, swipe left on the desired object and tap the “Delete” action.
2. Confirm the deletion of the object.

15.5 Renaming an Object

In order to rename a folder or file, proceed as follows:

1. In the list view, swipe left on the desired object and tap the “Properties” action, or view the object that you want to rename and tap the “Properties” action.

Note: Only available with corresponding configuration settings.

15.6 Info

In order to see the information about a Teamroom, folder, or document, proceed as follows:

1. Navigate to the desired Teamroom, folder, or document.
2. Tap the “Info” button on the action panel.

Note: Only available with corresponding configuration settings.

15.7 Properties

In order to see the properties about a Teamroom, folder, or document, proceed as follows:

1. Navigate to the desired Teamroom, folder, or document.
2. Tap the “Properties” button in the action panel.
3. You can tap the “Edit” button to edit the object before proceeding.
4. Tap “Next” to save your changes and close the dialog.

Note: Only available with corresponding configuration settings. Requires Fabasoft Folio 2020 Update Rollup 3 or later.

16 Searching

The Fabasoft App provides a versatile GUI to handle various search modes.

1. Enter the desired search query in the search field below the title bar.
2. Tap “Enter”.

This causes the search result and the “Search Facet” tool to be opened.

You also can enter the search via the navigation menu or by clicking the search widgets on the home screen.

The “Search Facet” tool is available on the left pane for devices that provide enough screen real estate. If the screen is too small, a button to open the “Search Facet” tool is displayed in the title bar. The button is marked with a red dot in case some filters have been set. When the “Search Facet” tool is opened via the button, it also contains the search field to directly adjust the search.

Note: If the search is opened without entering a search query the “Search Facet” tool is shown instead of the search result list. After entering a search query or changing a search criterion the “Search Facet” tool will move to the left pane or will be accessibility via the button in the title bar.

Tap a facet to open the facet selection dialog. The facet selection dialog offers an input field for filtering the available facets. Tap a facet to change the selection. Facets cannot be selected while a search request is running. When the facet selection dialog is saved, the search will reload and display the adjusted restrictions.

The available facets on the search mode. Multiple instances of search can be opened.

16.1 Search Modes

The Fabasoft app provides the search modes “Search with Mindbreeze”, “Search with Backend” and “Search Offline”.

Searching with Mindbreeze

When the search is performed using Mindbreeze, there are typically many facets available to limit the available search results. The facets are generated by Mindbreeze according to the search result for the current search query. Searching with Mindbreeze allows full-text search and finds all folders and documents indexed by Mindbreeze.

Searching with Backend

When a search is performed using the backend search via web service, there are no facets available except for "Type". Searching with backend only checks for name matching of the desired search query.

Searching Offline

When a search is performed while in offline mode or when there is no connection, there are no facets available except for "Type". Searching offline only encompass synchronized entries. Entries that have been cached locally, but are not synchronized, will not be searched.

On iOS, an entry will be displayed as a result to the search query if any cached property matches the desired search query.

On Android, an entry will be displayed as a result to the search query if the name matches the desired search query.

16.2 Saving and Loading a Search Query

To save a search query, proceed as follows:

1. Open the "Search Facet" tool.
2. Tap the "Save Search Query" entry.
3. Enter a name and tap "OK".

Note: The name must be unique.

The saved search query contains the selected facets and the parent where the search has started (this is relevant for some search constraints).

To load an already saved search query, proceed as follows:

1. Open the "Search Facet" tool.
2. Tap the "Saved Search Queries" entry.
3. Select a saved search query.

The search will reload with the saved search query and the previously selected facets.

Due to different available facets, depending on online or offline mode, the search queries are saved in different containers. It is not possible to load a saved search query from an offline search while online and vice-versa.

17 Data Transfers

The "Data Transfers" section can be found in the navigation menu. In it, all pending data transfers (downloads and uploads) are listed, e.g. during synchronization of folders, uploading files from the device, uploading comments, etc.

You can use this list to get more information about the progress of the synchronization or upload job. You can also cancel such a job.

Cancelling Data Transfers

In order to cancel a synchronization or upload job, proceed as follows:

1. Swipe the entry in the data transfers list from left to right.
2. Tap the "Cancel" button.

18 Settings

The app settings can be accessed via the navigation menu. A mobile device management system can also be used to administrate and distribute many of these settings.

For further information on settings available in mobile device management, please visit:

<https://help.folio.fabasoft.com/index.php?topic=doc/Mobile-Device-Management/index.htm>

18.1 Repository Info

Presents information on regarding connected repositories (backends).

18.2 Local Data Storage (iOS Only)

Displays size information about data used on the device for synchronized and cached objects.

In order to delete cache data, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Tap "Local Data Storage".
3. Tap "Delete now".
4. If you want to delete only data used for temporarily cached objects, but not for synchronized objects, tap "Temporary data only".
5. If you want to delete all cached data, including data used for synchronized objects, tap "Temporary and synchronized data".

18.2.1 Clearing Entire Cache (Android Only)

In order to clear the cached data, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Tap "Clear Entire Cache".

18.2.2 Clearing Cache on Logout

You may decide that the Fabasoft App should delete your entire cache when you perform a logout on this device. This will avoid that data only accessible to the current user remains on the device after the logout.

1. Open "Settings" via the navigation menu.
2. Tap "Local Data Storage".
3. Enable/disable the setting "Clear on Logout".

18.3 Sorting (Android Only)

In the setting “Default Sorting”, you can choose how newly loaded lists are sorted. For all sorting options, see chapter 7.1 “Sorting Objects”.

Note: On iOS, the default sorting is retrieved from the settings on the server.

18.4 View Activities as PDF

In the “View Activities as PDF” setting, you can determine if folders are displayed as their PDF rendition when an activity is opened in the worklist. By default, folders present their contents in a list.

18.5 Security

The Fabasoft App provides the following security features.

18.5.1 Passcode

The Fabasoft App must be secured with an app passcode. The additional app passcode is an extra layer of security in order to protect the data stored on your device. If you switch the app to the background for more than 15 seconds, or keep it open for more than 3 minutes without interaction, the app will be automatically locked. In order to unlock the app, you must identify yourself via the app passcode or biometric identification. The app code must consist of at least six digits.

When the app is used for the first time, the user is required to enter a passcode.

If the passcode is entered incorrectly 5 times, all data in the app will be erased.

Note:

- The app passcode is used to protect the access to your data via the user interface of your device. The Fabasoft App will not use the app passcode to encrypt locally stored and cached data. However, data stored on the device is encrypted by operating system mechanisms. On iOS devices and on Android devices that support data encryption, your data is safe as long as you protect your device with a device pin! It may be possible to access the data on your device through some third-party tools (e.g. backup tools) as soon as your device is unlocked.
- By default, the Fabasoft App requires using an app passcode. The individual user cannot deactivate this feature. However, this feature and its enforcement can be disabled by using a corresponding mobile device management setting. This setting has to be administered and distributed centrally.

For further information on settings available in mobile device management, please visit:

<https://help.folio.fabasoft.com/index.php?topic=doc/Mobile-Device-Management/index.htm>

18.5.2 Changing a Passcode

In order to change your app passcode, proceed as follows:

1. Open “Settings” via the navigation menu.
2. In “Security” (on iOS) or “Passcode Lock” (on Android), tap “Change Passcode”.
3. Enter your current passcode.

4. Enter your new passcode.
5. Re-enter your new passcode.

18.5.3 Using Biometric Identification to Unlock the App

You can enable/disable the usage of the biometric identification feature, depending on your device, to unlock the Fabasoft App.

1. Open “Settings” via the navigation menu.
2. In “Security” (iOS) or “Passcode Lock” (Android), enable/disable “Use Touch ID/Face ID/Fingerprint ID for Passcode”.
3. Confirm this change by entering your current passcode.

18.5.4 Activating Passcode Lock

In case that the app passcode feature is not enforced on your device, you can activate and deactivate the passcode lock for the Fabasoft App via the corresponding option.

1. Open “Settings” via the navigation menu.
2. In the “Security” tab, tap the corresponding option to activate or deactivate the app passcode.

18.5.5 Certificate for Login (iOS Only)

The Fabasoft App supports multiple authentication methods including authentication with client certificates. However, on iOS, an app is not allowed to access the system key chain to get access to globally deployed certificates. It is possible to import a client certificate into the app, though, if required. This can be done either by importing a PKCS#12 file into the Fabasoft App using iTunes, or by opening a file with the extension `px.fabasoft` in the Fabasoft App using the “Open in” feature of another app.

You can see the state of the imported client certificate when choosing this option. If there are multiple client certificates available, you can select the certificate that should be used for client certificate authentication.

Note: We recommend using a SAML identity provider in combination with the permanent login feature (requires Fabasoft Folio 2020 Update Rollup 2 or later as backend system). In this case, the authentication is delegated to a Safari web view which has access to the system key chain. In general, mobile device management software allows to distribute client certificates that can be used by Safari. In this case the client certificate need not be stored in the context of the Fabasoft app.

18.6 Access for Apple Watch (iOS Only)

The Fabasoft App for iOS includes an Apple Watch app which allows you to access your worklist on the Apple Watch.

For a detailed description of all Apple Watch app features, see chapter 19 “Apple Watch App (iOS Only)”.

18.6.1 Connecting Your Watch

To access your worklist on the watch, you need to activate the connection by creating a password for applications in the Fabasoft App settings:

1. Open "Settings" via the navigation menu.
2. Select "Access for Apple Watch".
3. Open the Fabasoft App on the Apple Watch.
4. Wait until the iPhone app and the Apple Watch app have established a connection.
5. Select the domain you want to connect.
6. Tap "Connect".
7. Set the validity period for the newly created password for applications.
8. Tap "Done".

Once a connection has been successfully established, the state is updated and highlighted in green. If you want to revoke this setting, see chapter **Error! Reference source not found.** "Error! Reference source not found."

Note:

- If you are logged in using username and password, no password for applications is generated. Instead, your credentials are securely transferred to the Apple Watch app.
- If you are logged in using a client certificate, it is not possible to connect the Apple Watch app.

18.6.2 Updating

If the previously created password for applications has been revoked or reached the end of its validity period the Apple Watch app connection has to be updated. To update the connection, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Select "Access for Apple Watch".
3. Select the domain you want to update.
4. Tap "Update".
5. Set the validity period for the password for applications.
6. Tap "Done".

Once the Apple Watch app has been successfully updated, the state is updated and highlighted in green.

Note: If the password for applications has been revoked, a new one is created. Once the end of the validity period has been reached, the validity period of the existing password is updated.

18.6.3 Disconnecting

To remove access to your worklist from the Apple Watch app, you need to disconnect the domain and revoke the password for applications in the Fabasoft App settings:

1. Open "Settings" via the navigation menu.
2. Select "Access for Apple Watch".
3. Select the domain you want to disconnect.

4. Tap "Disconnect".

Once the Apple Watch app has been successfully disconnected, the state is updated and highlighted in red.

Note: The "Disconnect" action can also be performed by swiping left on the domain you want to disconnect.

18.7 LAN Synchronization

By default, synchronization is carried out over the internet with your backend system. Depending on the amount of data to be transferred and the speed of your internet access, this may take a considerable amount of time.

Use LAN synchronization to achieve a significant reduction in the required internet bandwidth and a significantly increased synchronization speed. When files need to be downloaded by the Fabasoft App (e.g. because they are synchronized or they have changed), all devices (including Microsoft Windows and Apple macOS workstations that have the Fabasoft Folio Client installed) that offer LAN synchronization in the same local network are contacted first, whether the changed data is already available locally. If this is the case, the data is synchronized via LAN, not the internet. Security is ensured in both cases through encryption.

To be able to use the LAN synchronization, you have to enable it:

1. Open "Settings" via the navigation menu.
2. Enable "LAN Synchronization".

Note: Synchronization and other communication use the TCP port 17096 and the IP multicast address 224.0.0.202 or ff02::1 (local subnetwork). If necessary, corresponding settings must be made for the firewall.

18.7.1 Managing Trusted Networks

LAN synchronization should only be used in trusted networks. Therefore, you can define SSIDs to identify your trusted Wi-Fi networks:

1. Open "Settings" via the navigation menu.
2. Enable "LAN Synchronization".
3. Tap "Manage Trusted Networks".
4. Tap "Add" to add your currently used Wi-Fi network to the list of trusted networks.

To delete a Wi-Fi network from the list, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Tap "Manage Trusted Networks".
3. Swipe right on the entry that you want to remove.
4. Tap the "Remove" button.

To check devices that offer files via LAN synchronization, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Tap "Connected devices".
3. To see how your device is presented on other devices, tap the "Info" action.

18.7.2 Offering Files

The Fabasoft App does not offer files for LAN synchronization by default, it only consumes them. If you want the Fabasoft App to offer files for LAN synchronization, you have to enable this functionality explicitly. Since it is not possible to create background jobs on iOS, the Fabasoft App for iOS is “locked” in that mode. The app cannot perform tasks in the foreground until you switch off this mode.

To enable the offer file mode, proceed as follows:

1. Open “Settings” via the navigation menu.
2. Tap “Offer Files”.
On iOS, you need to end this mode if you want to work with the app again.

Note: On Android, the “Offer Files” mode works both as a foreground or background job. On iOS, however, the Fabasoft App must remain active in the foreground.

When “Offer Files” mode is active on iOS, consider the following:

- Connect your device to the power supply, since this mode may cause increased power drain.
- The device will not go into stand-by-mode.
 - Keep your device in a safe place.
 - It is advisable to reduce screen brightness in order to protect the screen of your device from burn-in (image retention).

18.8 Showing Locked Files (Android Only)

When opening a document for editing in a third-party app in the Fabasoft App for Android, the object will be locked as long as the document is being edited in the third-party app. To get an overview of locked objects, proceed as follows:

1. Open “Settings” via the navigation menu.
2. In “Locked Files”, tap “Show Locked Files”.

Unlocking All (Android Only)

In case that the editing of files is not terminated correctly by the third-party app, you can release the locks of all open documents:

1. Open “Settings” via the navigation menu.
2. In “Locked Files”, tap “Unlock All”.

18.9 Support

You can send a support request or feedback to the support team when you experience difficulties using the app. To trigger a support request, proceed as follows:

1. Shake your device or take a screenshot (iOS only).
2. Provide a description of your problem.
3. Decide whether to include a screenshot.

Note: It is recommended to send a screenshot along with your support request. However, by default, the screenshot is not included. Manually include the screenshot by activating the

corresponding option in the feedback dialog. This will help the support team to better help you with your problem.

4. Tap "Send".

Note: You can only send support requests if Fabasoft app.telemetry is configured correctly in your backend environment.

18.9.1 Sending a Support Request

To send a generic support request, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Tap "Send Support Request".
3. Provide a description of your problem and tap "Send".

Note: When sending a generic support requests, no screenshots are generated and included.

18.9.2 Shaking for Support

If you want to enable/disable the option to trigger a support request by shaking your device, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Enable/disable "Shake" in the "Support" section.

18.9.3 Screenshot (iOS Only)

If you want to enable/disable the option to trigger a support request by taking a screenshot, proceed as follows:

1. Open "Settings" via the navigation menu.
2. Enable/disable "Screenshot" in the "Support" section.

18.10 Open Source Licenses

Lists the licenses of open source software used to build the Fabasoft App.

18.11 Rating the App

We would appreciate if you took the time to rate and provide feedback for the Fabasoft App for iOS and Android in the respective store.

18.12 About

The version and build number of the currently installed version is available in the "About" dialog.

1. Open "About" via the navigation menu.

or

1. Open "Settings" via the navigation menu.
2. Scroll to the end of the view.

19 Apple Watch App (iOS Only)

The Fabasoft App for iOS includes an Apple Watch app which allows you to access your worklist on the Apple Watch.

The Apple Watch app provides the following features:

- Displays the “To Do” list and the “To Do as Substitute” list of the connected domain.
- Provides a detailed overview of specific activities.
- Opens a specific activity on the iPhone.

19.1 List View

The list view contains a cumulated list of all “To Do” and “To Do as Substitute” activities. Each entry in the list consists of a title, subtitle, an abstract, and the “received on/at” date. The activities are sorted by their “received on/at” date in descending order.

By selecting a list entry, the details of an activity are displayed.

Reload

The list is automatically reloaded on several occasions e.g. when opening the app or completing an activity on the iPhone. To reload the list manually, use the context menu on the list:

1. Perform a long tap on the list using force touch.
2. Tap the “Refresh” button.

19.2 Detail View

The detail view offers all details of a specific activity. It consists of at least the title, the subtitle, the “received on/at” date and the full abstract of an activity. Furthermore, there may be more relevant properties, e.g. the “started on/at” date or the hint.

In addition to the details of an activity, there is the “Open on iPhone” button. It opens the selected activity on the iPhone to perform additional actions on that activity.

20 Accessibility

The Fabasoft App supports operation specific accessibility features such as “Voice Over” on iOS or “Talkback” on Android.

21 Support

You can send a support request or feedback to the support team when you experience difficulties using the app. To trigger a support request, proceed as follows:

1. Shake your device or take a screenshot (iOS only).
2. Provide a description of your problem.
3. Decide whether to include a screenshot.

Note: It is recommended to send a screenshot along with your support request. However, by default, the screenshot is not included. Manually include the screenshot by activating the

corresponding option in the feedback dialog. This will help the support team to better help you with your problem.

4. Tap "Send".

Note: You can only send Support requests if Fabasoft app.telemetry is configured correctly in your environment.

22 Export Control Classification Number (ECCN)

According to the policy guidance for "Encryption and Export Administration Regulations (EAR)" published by The Bureau of Industry and Security (BIS) of United States Department of Commerce (see <https://www.bis.doc.gov/index.php/policy-guidance/encryption>) the Export Control Classification Number (ECCN) for the Fabasoft App fall under 5D992.c (Information Security – Software – Mass Market encryption item).

Fabasoft provides the ECCN in order to facilitate export operations. The exporter is responsible for complying with the Export Administration Regulations (EAR). Therefore, you should consult the Export Administration Regulations (EAR) or your export counsel to determine the appropriate license type and eligible countries for export purposes.