



LiquidOffice™ Mobile Interface Guide

Version 6.1

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Contents

CHAPTER 1

Technical Resources

About This Chapter.....	7
Documentation.....	7
Online Help.....	7
Basic Tutorial.....	7
Web Site.....	8
Technical Support.....	8

CHAPTER 2

Server Setup — Administrators

About this Chapter	11
Overview	12
Before you Begin	12
LiquidOffice Management Console Settings	13
License Code	13
Server Settings: BES Server and Mobile Fill Time	14
Assign Roles to Mobile Users: Process Approver and Mobile User	15
Enable the mobile option on forms (unstructured processes)	15
Enable the Mobile Option for Form Tasks in Process Studio (Structured Processes)	17
Administrative Installation - Blackberry	18

CHAPTER 3
Installation — Mobile Users

About this Chapter 19

Before you Begin 20

 My Profile..... 20

Install LiquidOffice on a Blackberry 21

 Wireless Deployment Option 21

CHAPTER 4
Using LiquidOffice Mobile for Blackberry

About this Chapter 23

LiquidOffice on your Blackberry 24

 LiquidOffice Screen..... 24

 Form Screen 24

 Program Options Screen 25

 Routing Screen..... 25

 LiquidOffice Icons 25

 Navigation Menus..... 26

 Inbox Date Label Menu 26

 Inbox Form Menu 26

 Form Menu 27

 Form Signature Menu 29

 Routing Menu 29

Supported Field Editing With LiquidOffice Mobile For Blackberry 30

Limitations with LiquidOffice Mobile For Blackberry 32

Receive and Submit In-Process Forms (Within a Structured Process) 33

CHAPTER 1

Technical Resources

ABOUT THIS CHAPTER

You have many options for getting information about LiquidOffice. This chapter describes the following options for technical resources concerning LiquidOffice:

- Documentation
- Online Help
- Basic Tutorial
- Web site
- Technical Support

DOCUMENTATION

We update the user documentation on a regular basis. To download the latest revision of a user guide, go to <https://customers.autonomy.com>.

ONLINE HELP

You can access the LiquidOffice Help system in LiquidOffice Form Designer, LiquidOffice Process Designer or the LiquidOffice Management Console by pressing the F1 key or clicking an option from the **Help** menu. You can access the LiquidOffice Help system in the LiquidOffice Server by clicking the **Help** button  on the right side of the Web Desktop. These Help systems include a Table of Contents, an Index, and a Search/Find feature.

BASIC TUTORIAL

The LiquidOffice Basic Tutorial provides an interactive environment for the user to learn the basic concepts behind LiquidOffice. In LiquidOffice Form Designer, you can access the interactive, online tutorial by selecting **Help** — **Basic Tutorial**. On the LiquidOffice Server, you can access the tutorial by clicking on the **Help** button. Click the **Show** link and select the **LiquidOffice Basic Tutorial** link in the Table of Contents.

The Online Tutorial requires the Flash Player™. This can be downloaded for free from the following website: <http://www.adobe.com/downloads>.

WEB SITE

The Customer Support web site, <https://customers.cardiff.com>, provides a wealth of information about LiquidOffice. The site includes:

- News updates;
- A list of Frequently Asked Questions (FAQs) that you can search for solutions to common problems;
- A library of documents in PDF format;
- Free downloads of Service Packs, patches, and other useful software;
- A glossary of terms you may encounter when working with your system;
- White Papers explaining the use of LiquidOffice in real-world scenarios;
- Automatic e-mail contact to Technical Support and Sales departments.

The **Help** menu in LiquidOffice Form and Process Studio provides a direct link to the web site.

TECHNICAL SUPPORT

If you have a question about LiquidOffice, you should first look in the LiquidOffice user documentation or check the web site for answers. Frequently Asked Questions (FAQs) are available on the Web site's Technical Support page. If you still can't find answers to your questions, contact Technical Support team.

We are dedicated to providing the highest quality technical support to registered LiquidOffice customers.

The Annual Support and Maintenance Plan for LiquidOffice

The Annual Support Plan offers the following benefits:

- Unlimited technical support via email, telephone, and fax during normal business hours
- Service packs for the product at no charge
- Point releases and major upgrades for the product at no charge

Point releases and major upgrades are only available to customers with an Annual Support and Maintenance Plan. Express shipping and handling is available for new point releases and major upgrades for a nominal fee. Contact your sales representative for more information.

Before You Contact Technical Support

Before you call Technical Support, please have the following available:

- The version and build number of LiquidOffice that you are running. To locate the version and build number of LiquidOffice Form Designer and Process Studio, select **About** from the **Help** menu. To locate the version and build number of LiquidOffice Server, click the **About** icon on the Web Desktop or the **About LiquidOffice** link in the **Help** menu of the LiquidOffice Management Console. You can also find the version number by selecting **Server** — **System Info** from the sidebar in the Management Console.
- The registration code of your software. To locate the license number on the LiquidOffice Server, launch the LiquidOffice Management Console and select **Server** — **System Info** from the sidebar.

Click on the **License Information** button .

NOTE: You can launch the Management Console by clicking on the Administration button  on the Web Desktop or by selecting the LiquidOffice Management Console shortcut from your local machine if the Management Console has been installed locally.

- The type of hardware you are using;
- The amount of available memory (RAM) and disk space on your system;
- A description of what you were doing when the problem occurred;
- The exact wording of any messages that appeared on your screen;
- Any other details pertinent to your problem.
- Contact the office appropriate to your location.

Americas

Email: support@cardiff.com

Telephone:

877.483.7489

403.294.1107 (Canada direct)

Hours: 07:00 to 18:00 MST (GMT-7)

European and Worldwide Support

Email: tsp-europe@autonomy.com

Telephone:

00.800.4837.4890 (UK, Germany, Spain, Netherlands, France)

1-403-294-1107 (other countries)

Hours: 09:00 to 17:00 (GMT+1)

CHAPTER 2

Server Setup — Administrators

ABOUT THIS CHAPTER

This chapter provides information on the following aspects of using the mobile interface:

- “Overview” on page 12
- “Before you Begin” on page 12
- “LiquidOffice Management Console Settings” on page 13
- “Enable the Mobile Option for Form Tasks in Process Studio (Structured Processes)” on page 17
- “Administrative Installation - Blackberry” on page 18

OVERVIEW

LiquidOffice users can receive, edit and submit in-process forms using mobile devices (e.g. Blackberry). This facilitates real-time access to and use of time-sensitive content, thereby accelerating cycles by connecting people with information and process, regardless of location.

BEFORE YOU BEGIN

Before you can begin using mobile devices to receive, edit and submit in-process forms via LiquidOffice, Administrators must do the following:

- Set up a server for the mobile devices (e.g. Blackberry Enterprise Server Software). See the documentation provided with your Server Software for specific information on setting up this server.
- Set up the applicable LiquidOffice Management Console settings. (See [page 13](#) for instructions.)
- Set up the applicable Process Studio settings. (See [page 17](#) for instructions.)

LIQUIDOFFICE MANAGEMENT CONSOLE SETTINGS

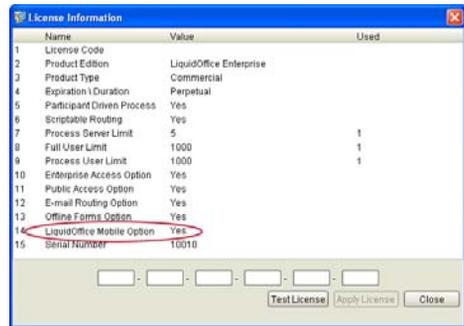
Before you can begin using mobile devices with LiquidOffice, a LiquidOffice Administrator must perform the following in the Management Console:

- Verify that your license code enables the **LiquidOffice Mobile Option** (page 13).
- Set up the following Server Settings: **BES Server** and **Mobile Fill Time** (page 14).
- Assign the following roles to users who will be receiving and submitting in-process forms using mobile devices: **Process Approver** and **Mobile User** (page 15).
- Enable the mobile option on the forms you wish to approve via the mobile device (page 15).

License Code

Verify that your license code enables the LiquidOffice Mobile Option.

1. Login to the Management Console.
2. Click **Servers > System Info**.
3. Click the **License Information** icon  at the top of the dialog. The License Information dialog appears.



4. Verify that the **LiquidOffice Mobile Option** has a **Value** of **Yes**.
IMPORTANT: If the **Value** is **No**, your license code does not support mobile devices. Contact your LiquidOffice sales representative for additional information.
5. If you have a new license code to support mobile devices, type the code into the fields provided and click **Test License**. If the license is valid, click **Apply License**.

Server Settings: BES Server and Mobile Fill Time

Now you need to set up the following Server Settings: **BES Server** and **Mobile Fill Time**.

1. Login to the Management Console.
2. Click **Servers > Settings**.
3. Double-click **BES Server**. The Server Setting dialog appears.

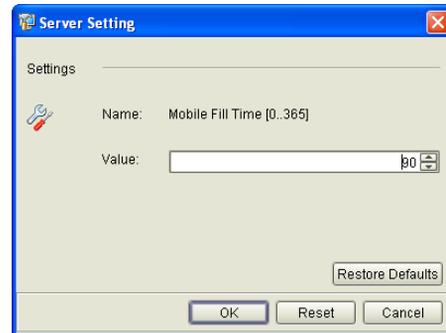


4. In the **Value** field, type the **IP Address** (or **DNS** name) and **Port Number** for the Blackberry Enterprise Server (e.g. [BES_Server].com: [Port_Number]).

NOTE: The **Port Number** is the Web Server Listening Port. The Port is for Mobile Data Service on the BES Server. The BES default for this port is: 8080. The **IP Address** (or **DNS** name) and **Port Number** should be separated by a colon.

5. Click **OK**.

6. Double-click **Mobile Fill Time**. The Server Setting dialog appears.



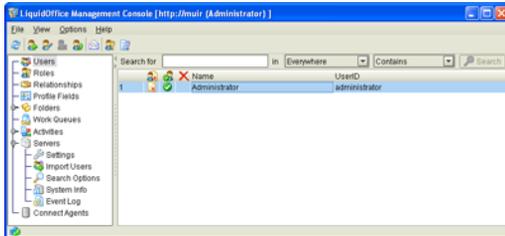
This setting defines the number of days a user has to submit a mobile form. This setting defaults to 90 days. If a user does not submit a form from the mobile device within the specified period of time, he/she will have to complete the form via the Web Desktop rather than through his/her mobile device. If he/she attempts to submit a form after this time has expired, an error will occur.

7. Type the appropriate number of days in the **Value** field.
8. Click **OK**.

Assign Roles to Mobile Users: Process Approver and Mobile User

Assign the following roles to users who will be receiving and submitting in-process forms using mobile devices: **Process Approver** and **Mobile User**. (See the Management Console help for specific information about setting up roles.)

1. Login to the Management Console.
2. Click **Users**.



3. Select the user(s) to whom you would like to assign these roles.

4. Click the **Roles**  icon. The Assign Security Roles dialog appears.



5. If necessary, move the **Process Approver** and **Mobile User** roles to the **Assigned** column.

NOTE: If your LiquidOffice Server is not licensed with the LiquidOffice Mobile Option ([page 13](#)), the **Mobile User** role will not appear in the list.

6. Click **OK**.

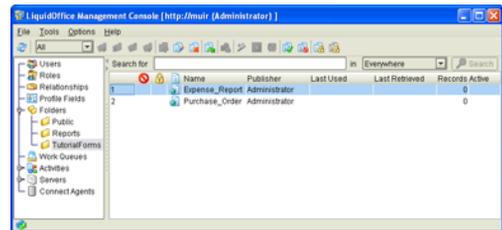
Enable the mobile option on forms (unstructured processes)

Enable the mobile option on the forms you wish to approve via the mobile device.

NOTE: If the form is only used within a structured process (i.e. the form is routed automatically via a process created using Process Studio [see [page 17](#)]), it is unnecessary to perform the following steps. However, if the form is used within an unstructured process (needs to be routed manually), the following steps are necessary.

NOTE: The following steps are applicable to forms already published to the LiquidOffice Server. This option can be set at publish time, as well.

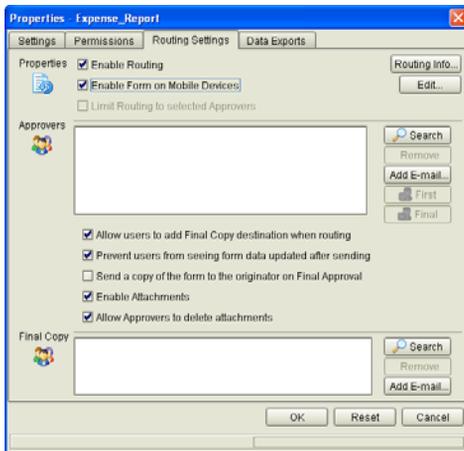
1. Login to the Management Console.
2. Click **Folders**.



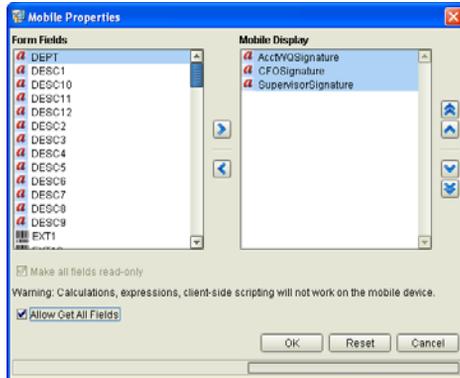
3. Select the form(s) you would like to set up for use with mobile devices.

4. Click the **Properties**  icon. The Properties dialog appears.

- Click the **Routing Settings** tab.



- Check the **Enable Form on Mobile Devices** box. This option is only available if the server is licensed with the LiquidOffice Mobile Option (page 13).
- Click the **Edit** button. The Mobile Properties dialog appears.



- Move the appropriate **Form Fields** to the **Mobile Display** column. The fields listed in the **Mobile Display** column will appear on the mobile device.

NOTE: The following types of form fields are not currently supported on mobile devices: Ink Pictures, Buttons, and Bar Codes. These fields will not appear in this list.

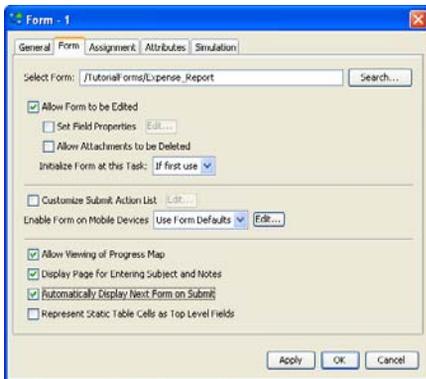
- Check **Make all fields read-only** if you do not want any of the fields on the form to be editable on the mobile device. Forms published prior to LiquidOffice 6.0 will be read-only by default. These forms must be republished using LiquidOffice Form Designer 6.0 + in order to deselect this option.
- Check **Allow Get All Fields** if you would like a mobile user to have the ability to view all of the form fields through the click of a button on the mobile device. This check box is disabled if all fields have been moved over to the **Mobile Display** column. It is enabled if there are still fields available in the **Form Fields** column.
- Click **OK**.
- Click **OK**.

ENABLE THE MOBILE OPTION FOR FORM TASKS IN PROCESS STUDIO (STRUCTURED PROCESSES)

Enable the mobile option on the Form tasks you wish to approve via the mobile device.

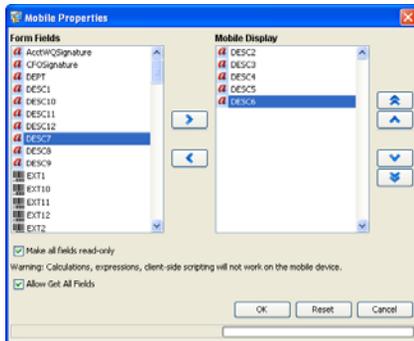
NOTE: If the form is ever used within an unstructured process (needs to be routed manually), the steps provided in [“Enable the mobile option on forms \(unstructured processes\)” on page 15](#) are necessary. However, if the form is only used within a structured process (i.e. the form is routed automatically via a process created using Process Studio), it is unnecessary to perform those steps.

1. Launch Process Studio and open the applicable process template.
2. Double-click the applicable **Form** task.
3. Click the **Form** tab.



4. Next to **Enable Form on Mobile Devices**, select one of the following options from the drop-list:
 - **Use Form Defaults:** If you select this option, the form fields set up to display on the mobile device within the Form Properties (via LiquidOffice Management Console: **Folders > Properties**) will be used. These fields can be viewed by clicking the **Edit** button. However, they cannot be edited within Process Studio. They can only be edited within the Management Console.
 - **Yes:** If you select this option, you must set up the form fields to display on the mobile device by clicking the **Edit** button. When this option is selected, the task properties will be used and the form properties will be ignored.

5. If you selected **Yes**, click the **Edit** button. The Mobile Properties dialog appears.



- 5.1 Move the appropriate **Form Fields** to the **Mobile Display** column. The fields listed in the **Mobile Display** column will appear on the mobile device.

NOTE: The following types of form fields are not currently supported on mobile devices: Ink Pictures, Buttons, and Bar Codes. These fields will not appear in this list.

- 5.2 Check **Make all fields read-only** if you do not want any of the fields on the form to be editable on the mobile device.
 - 5.3 Check **Allow Get All Fields** if you would like a mobile user to have the ability to view all of the form fields through the click of a button on the mobile device. This check box is disabled if all fields have been moved over to the **Mobile Display** column. It is enabled if there are still fields available in the **Form Fields** column.
 - 5.4 Click **OK**.
6. Click **OK**.
 7. Save and publish the process. (See the Process Studio online help for more specific information.)

ADMINISTRATIVE INSTALLATION - BLACKBERRY

A BES administrator may elect to push the LiquidOffice application out to mobiles using the Blackberry Handheld Manager tool. The administrator will need to access the application's COD archive and JAD descriptor from the LiquidOffice Server. See the documentation provided with the BES Server Software for specific information on setting up this option.

CHAPTER 3

Installation — Mobile Users

ABOUT THIS CHAPTER

This chapter provides information on the following aspects of using the mobile interface:

- “Web Desktop Setting” on page 20
- “Install LiquidOffice on a Blackberry” on page 21

BEFORE YOU BEGIN

Before you can begin using mobile devices to receive, edit and submit in-process forms via LiquidOffice, mobile users must do the following:

- Set up the applicable Web Desktop ([page 20](#)) settings.
- Install LiquidOffice on a Blackberry ([page 21](#)).

WEB DESKTOP SETTING

Before you can begin using a mobile device to receive, edit and submit in-process forms, you must set up “My Profile” in the Web Desktop to send forms to your mobile device.

My Profile

1. Login to the Web Desktop.
2. Click the **My Profile** tab.
3. Click the **Customize** button.
4. In the **Mobile Inbox** section, check the **Forward approvals to my mobile device** box. This allows the LiquidOffice Server to push mobile-enabled forms (see “[Enable the mobile option on forms \(unstructured processes\)](#)” on [page 15](#)) to your mobile device upon receipt.



NOTE: If the **Mobile Inbox** section does not appear on this page, you do not have the appropriate roles assigned *OR* your LiquidOffice Server is not licensed with the LiquidOffice Mobile Option. See “[Assign Roles to Mobile Users: Process Approver and Mobile User](#)” on [page 15](#) or “[License Code](#)” on [page 13](#) for additional information.

5. If you have not installed LiquidOffice on your mobile device, click the **Send** button. A message will display informing you whether or not the message was sent successfully. An **Install LiquidOffice** message is sent to your mobile device. See “[Install LiquidOffice on a Blackberry](#)” on [page 21](#) for the next steps in the installation process.

NOTE: If you have already installed LiquidOffice on your mobile device or an **Administrative Installation** ([page 18](#)) has already occurred, it is unnecessary to click **Send** again.

6. Click the **Save** button to save your custom settings in **My Profile**.

NOTE: If the **Install LiquidOffice** message does not appear on your mobile device, contact your LiquidOffice Administrator.

INSTALL LIQUIDOFFICE ON A BLACKBERRY

In order to receive, edit and submit in-process forms using your Blackberry, you must install LiquidOffice on the mobile device.

Wireless Deployment Option

The following steps describe how to install using the **Wireless Deployment Option**. It is also possible to install LiquidOffice on Blackberry devices using the **Administrative Option** (see “[Administrative Installation - Blackberry](#)” on page 18).

NOTE: If you have already installed LiquidOffice on your Blackberry device or an **Administrative Installation** (page 18) has already occurred, it is unnecessary to perform the installation again.

1. In order to begin the installation, you have to click the **Send** button described in the **My Profile** section of this guide (page 20). The installation message is sent to your Blackberry device **Messages**.
2. Open the **Messages** application.



3. Using the navigation menu, open the **Install LiquidOffice** message. A LiquidOffice web page appears.

4. Scroll to and select the link on the page (“Click ‘here’”).



5. An additional page appears with a **Download** button.



6. Click **Download**. The following message appears: “Downloading LiquidOffice Mobile for Blackberry Devices”.

NOTE: The following message may appear: “Do you want to allow the application LiquidOffice to act as a server?” Click **Allow this connection**. If this message appears a second time, click **Allow this connection** again.

7. When a message appears stating, “The application was successfully installed”, click **OK**.



NOTE: If you receive an error, try downloading LiquidOffice again. If you continue to encounter an error, contact your LiquidOffice Administrator.

8. **Exit** all the screens until you have returned to the main menu of your Blackberry device. Notice that a **LiquidOffice** icon is now available in your menu.



LiquidOffice will initially appear as the first option on the Blackberry device menu. However, once the application is installed, you may position the option as desired. (See the documentation provided with your Blackberry for specific information about this feature.)

CHAPTER 4

Using LiquidOffice Mobile for Blackberry

ABOUT THIS CHAPTER

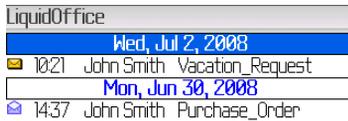
This chapter provides information on the following aspects of using LiquidOffice on a Blackberry:

- “LiquidOffice on your Blackberry” on page 24
- “Supported Field Editing With LiquidOffice Mobile For Blackberry” on page 30
- “Limitations with LiquidOffice Mobile For Blackberry” on page 32
- “Receive and Submit In-Process Forms (Within a Structured Process)” on page 33

LIQUIDOFFICE ON YOUR BLACKBERRY

There are a variety of screens, menus and icons associated with the LiquidOffice application on your Blackberry.

LiquidOffice Screen



This screen may be accessed by clicking the **LiquidOffice** icon in the main menu of your Blackberry.



Form Screen

```
Purchase_Order
Originator: John Smith
Sender: John Smith
Received: Jun 30, 2008 2:37 PM
Subject: Purchase_Order
Notes: For testing machines

Date Originated: 6/30/2008
Order_Number: 3
Originator Name: John
M_I: J
LastName_I: Smith
```

This screen may be accessed by opening any message in the **LiquidOffice** application.

Program Options Screen



Options	
Days to Keep Inbox Items	30 days

This screen is accessed through the LiquidOffice screen by selecting the **Options** item from the navigation menu.

The **Days to Keep Inbox Items** option controls the amount of time forms will be kept in the Inbox before being purged from the Blackberry. If you select the existing number of days and select **Change Option** in the navigation menu, you will see five selectable options: 15 days, 30 days, 45 days, 60 days, and 90 days. The default is 30 days.



Options	15 days
Days to Keep Inbox Items	30 days
	45 days
	60 days
	90 days

Routing Screen



Routing for Form	
<input checked="" type="radio"/> User	
<input type="radio"/> Routing Completed	
E-mail: jsmith@mycompany.com	
Subject: Purchase_Order	
Notes: Approved by John Smith	

This screen allows you to select a **User** to whom you would like to route the form or set **Routing Complete**.

If you select **User**, you must type an email address in the **Email** field.

You can also type any applicable **Notes**.

If you select **Routing Complete**, the **Email** field is disabled.

The **Email** field will perform a simple validation on the text entered. If the text does not constitute a valid email address, an error dialog will prompt you to enter a valid address.

LiquidOffice Icons

The icon preceding each form in the LiquidOffice screen indicates the form's state, which will be one of the following:

-  **New** - Form has NOT been opened. The form may be opened and submitted.
-  **Viewed** - Form has been opened, but not submitted. The form may be opened and submitted.
-  **Sending** - Attempting to contact a server. The form may NOT be opened until operation is completed.
-  **Waiting** - Waiting for a connection to a server. The form may NOT be opened until operation is either cancelled or completed.
-  **Error** - An error occurred submitting form to a server. The form may be opened and re-submitted.
-  **Approved** - Form has been approved and successfully submitted to a server. The form may be opened and viewed, but NOT submitted.
-  **Rejected** - Form has been rejected and successfully submitted to a server. The form may be opened and viewed, but NOT submitted.
-  **Transferred** - Form has been transferred and successfully submitted to a server. The form may be opened and viewed, but NOT submitted.
-  **Redirected** - Form has been redirected to another user via the Web Desktop. The form may be opened and viewed, but NOT submitted.

-  **Withdrawn** - Form has been withdrawn by the originator. The form may be opened and viewed, but NOT submitted.
-  **Removed** - Form has been removed by the originator. The form may be opened and viewed, but NOT submitted.

The date preceding each form is the date and time received by the LiquidOffice Server, NOT the date and time received by the Blackberry.

If the sender is NOT specified for the form, the text "Not Specified" is displayed instead.

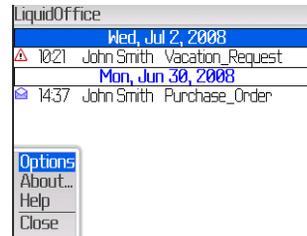
The forms are sorted by date and time received and each group of forms received on the same day are preceded by a date label.

Navigation Menus

The options in these menus vary based on what screen you are viewing.

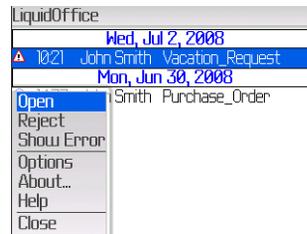
NOTE: Some Blackberry devices may have more navigation menu options available than those described in this section. For specific information about menu options on your device, see the documentation provided with your Blackberry.

Inbox Date Label Menu



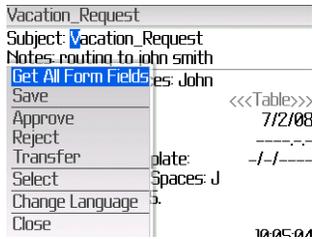
- Options** - Selecting this option opens the Program Options screen ([page 25](#)).
- Close** - Selecting this option closes the application. This option may not always be available.

Inbox Form Menu



- Open** - Selecting this option opens the Form screen for the selected form.
- Reject** - Selecting this option rejects the selected form.
- Show Error** - Selecting this option displays the error message for the selected form. This option is only available if the form has an Error status.
- Cancel Submit** - Selecting this option cancels the pending submit operation for the selected form. The option is only available if the form has a Waiting status.
- Options** - Selecting this option opens the Program Options screen ([page 25](#)).

Form Menu

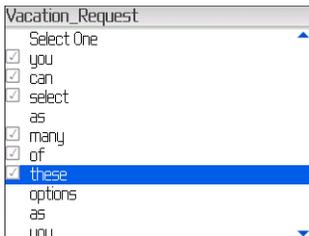


- **Expand Field** - Selecting this option expands all fields truncated with an ellipsis. The fields may take up more than one line after expansion. This option is only available if fields are currently collapsed.

Access the navigation menu and select **Expand Field**.

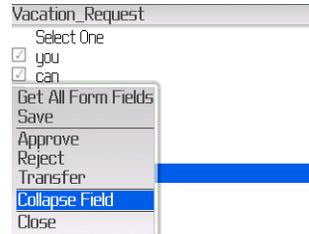


The multi-select item list appears.

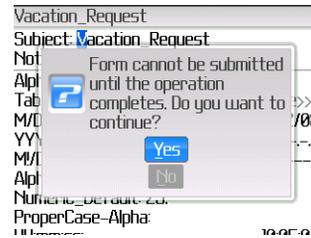


Press the spacebar to iterate and select items.

When you have finished, click **Collapse Field** in the navigation menu.

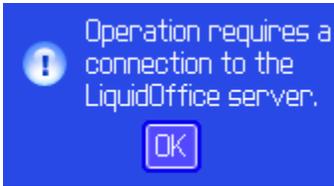


- **Collapse Field** - Selecting this option collapses all fields that take up more than one line by truncating them with an ellipsis. This option is only available if fields are currently expanded.
- **Get All Form Fields** - This option is only available if it was turned on in the form or process properties (see [“Enable the mobile option on forms \(unstructured processes\)”](#) on page 15 and [“Enable the Mobile Option for Form Tasks in Process Studio \(Structured Processes\)”](#) on page 17). Selecting this option displays a confirmation message.



Upon confirmation, the application retrieves all of the form fields from the server and redisplay the form. You are returned to the LiquidOffice screen. You will not be able to submit the form until the operation completes. The form status is set to "Sending" during this time. Once this completes, you can reselect the form to view it again.

If unable to connect to the LiquidOffice Server, an alert message is displayed.



- **Submit Actions** - The submit action options (e.g. **Approve**, **Reject**, **Transfer**) are dynamically populated with the values obtained from the server. Selecting a submit action will redirect the user to the Routing screen (page 25) if the routing page is set to be shown. Otherwise, the form is submitted to the server using the selected submit action.

If a submit fails, an error icon appears next to the form.

If you select the **Transfer** submit action, you will see a page allowing you to enter an **Email** address. Type the email address of the individual you would like to transfer the form to and select **Send** in the navigation menu.

An additional page *may* appear allowing you to provide **Subject** and **Notes** for the form. Type any applicable **Subject** and **Notes** and select **Send** in the navigation menu.

- **Show Table Detail**

Selecting this option expands all fields truncated with a Table. The fields will take up more than one line after expansion.

Select a Table field. Access the navigation menu and select **Show Table Detail**.



The Table Detail appears.

Table1 Detail	
TitleEntry: Radio	
TitleNum: 5.	
TitleDate:	2008.7.2
TitleEntry: Radio2	
TitleNum: 6.	
TitleDate:	2008.7.2
TitleEntry: Radio3	
TitleNum: 7.	
TitleDate:	2008.7.2

Edit any of the applicable fields in the table.

When you have finished, click **Close Table** in the navigation menu.

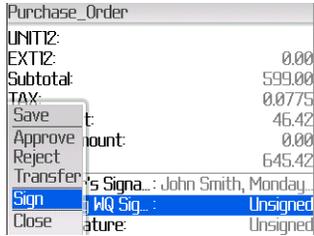
Table1 Detail	
TitleEntry: testRadio	
TitleNum: 5.	
TitleDate:	2008.7.3
TitleEntry: Radio2	
TitleNum: 6.	
TitleDate:	2008.7.2
TitleEntry: Radio3	
TitleNum: 7.	
TitleDate:	2008.7.2

You will be prompted to save your changes. Select **Save**.



- **Close** - Selecting this option closes the screen and returns to the application screen that launched the form (LiquidOffice or Messages). This option may not always be available.

Form Signature Menu

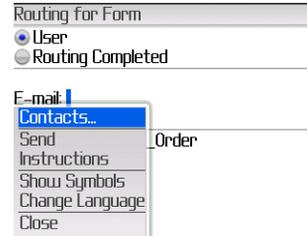


- **Sign** - Selecting this option displays the affirmation message specified by the signature field.



Upon affirmation, the signature will appear as a signed signature, be made read-only, and will no longer be available for signing through the navigation menu.

Routing Menu



NOTE: For fillable text fields (i.e. Email, Subject, Notes) more options may appear in your navigation menu than those described in this section. For specific information about navigation menu options not described in this guide, see the documentation provided with your BlackBerry.

- **Contacts** - You must have the **Email** field selected to see this option in the navigation menu. Selecting this option displays a selection dialog containing all of the contacts currently stored on the device. Contacts are listed by First Name + Last Name in the order specified in the Options menu of the Address Book application. Text entered in the **Find** field filter the list by displaying only the contact names containing the filter string. Selecting **Route To** populates the email address field on the Routing Screen with the email address of the selected contact. If the dialog is closed without making a selection, no action is taken.
- **Send** - Selecting this option submits the form and routes it to the user specified with the specified subject and notes.
- **Instructions** - Selecting this option displays the routing instructions for the form in a popup dialog.
- **Close** - Selecting this option closes the Routing screen without submitting the form. This option may not always be available.

SUPPORTED FIELD EDITING WITH LIQUIDOFFICE MOBILE FOR BLACKBERRY

The following field types support editing with some limitations (see “Limitations with LiquidOffice Mobile For Blackberry” on page 32):

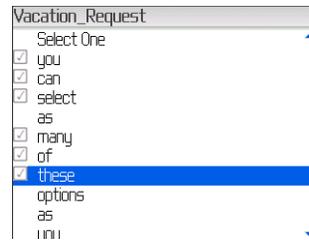
- Text Entry
- Numeric Entry
- Date/Time Entry
- Template Entry
- Password Entry
- List
 - Use the spacebar to move through the items in the list.
- Multi-select List
 - Scroll to the Multi-select List field.



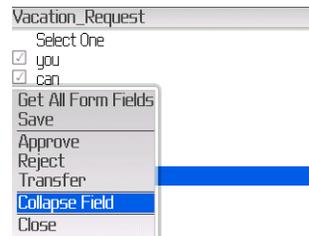
- Access the navigation menu and select **Expand Field**.



- The multi-select item list appears.



- Press the spacebar to iterate and select items.
- When you have finished, click **Collapse Field** in the navigation menu.



- Drop List
 - Use the spacebar to move through the items in the list.
 - OR
 - Click **Change Options** in the navigation menu.
- Combo
 - Use the spacebar to move through the items in the list.
 - OR
 - Click **Change Options** in the navigation menu.
 - Select [**Other...**] to type a free-entry.
- Radio
 - Use the spacebar to select or de-select.
- Checkbox
 - Use the spacebar to select or de-select.
- Signature

- Scroll to the Signature field. Click **Sign** in the navigation menu.

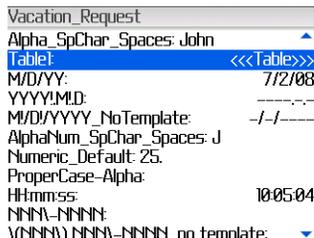


NOTE: All signature fields are displayed at the bottom of form. Only click-through signatures which have not yet been signed are focusable and available for signing through the navigation menu.

- A message will appear verifying that you would like to approve the document. Click **Yes**. Your digital signature will appear at the bottom of the screen.



- Tables/Dynamic Tables
 - Scroll to the Table field.



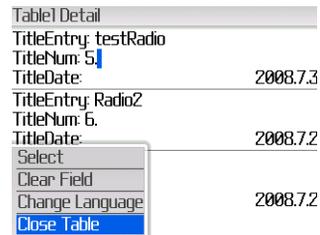
- Access the navigation menu and select **Show Table Detail**.



- The Table Detail appears.

Table Detail	
TitleEntry: Radio	
TitleNum: 5.	
TitleDate:	2008.7.2
TitleEntry: Radio2	
TitleNum: 6.	
TitleDate:	2008.7.2
TitleEntry: Radio3	
TitleNum: 7.	
TitleDate:	2008.7.2

- Edit any of the applicable fields in the table.
- When you have finished, click **Close Table** in the navigation menu.



- You will be prompted to save your changes. Select **Save**.



The following field attributes support field editing:

- Read-only
- Required
- Hidden

The following field formatting/validation support field editing (see “[Limitations with LiquidOffice Mobile For Blackberry](#)” on page 32):

- Text
- Numeric
- Date/Time
- Template
- Max Length

LIMITATIONS WITH LIQUIDOFFICE MOBILE FOR BLACKBERRY

General Limitations

The following options are NOT supported on Blackberry devices:

- Work queues in unstructured processes
 - Field validation limitations:
 - Numeric: currency signs, extra decimal places, minimum/maximum enforcement
 - Date/Time: minimum/maximum enforcement
 - Minimum Length
 - Checking signature validity/integrity
 - Translation; English only
 - Unicode
9. An additional page *may* appear allowing you to provide **Subject** and **Notes** for the form. Type any applicable **Subject** and **Notes** and select **Send** in the navigation menu.

Field Editing Limitations

The following *limitations* apply when performing field editing:

- Barcodes: read-only value displayed
- Text Entry fields do not support special characters
- Numeric fields do not support currency signs, extra decimal places, minimum/maximum enforcement
- Date/Time fields do not support minimum/maximum enforcement; cannot support dates before January 1, 1970
- Dynamic Tables do not support adding/deleting rows

The following options are NOT supported when performing field editing:

- Minimum Length
- Calculations
- Expressions
- Database Validation
- Database Lookups
- Client Script
- Paging, Form Layout
- InkPictures
- Images
- Links
- Buttons
- Form Text
- Adding Attachments
- Disabling Field Titles

RECEIVE AND SUBMIT IN-PROCESS FORMS (WITHIN A STRUCTURED PROCESS)

Once a LiquidOffice user routes a form to an individual with **Forward approvals to my mobile device** selected in the Web Desktop > My Profile settings ([page 20](#)), the form is then available for review via the mobile device.

NOTE: See the LiquidOffice Web Desktop help for specific information on how to route a form.

1. Open **LiquidOffice** on the Blackberry.



2. Scroll to and open the message.



3. Review the form fields.
4. The form fields displayed are those set up via the Form Properties ([page 15](#)) or Process Task Properties ([page 17](#)). Depending on the properties of the form or process task, many form fields may be editable on the mobile device. See [“Supported Field Editing With LiquidOffice Mobile For Blackberry”](#) on [page 30](#) and [“Limitations with LiquidOffice Mobile For Blackberry”](#) on [page 32](#) for specific information about the field editing options and techniques.

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- Once the form has been reviewed, edited and/or signed, navigate to the applicable submit action (e.g. **Approve**, **Transfer**, **Reject**; see “**Form Menu**” on page 27).



- An additional page *may* appear allowing you to provide **Subject** and **Notes** for the form. Type any applicable **Subject** and **Notes** and select **Send** in the navigation menu.
- The form is then processed through LiquidOffice according to your selections.

TIP: If a mobile-enabled form is submitted, transferred, saved for later, withdrawn, removed, redirected, or rejected from the Web Desktop, the corresponding form on the Blackberry will be updated to reflect the change.