



Notate for Blackberry Android

User Guide- Version 3.5

Shafer Systems LLC

Notate for Android User Guide

Overview: Notate is designed for the mobile professional and to meet the needs of business and enterprise data management regulatory compliance. Notate supports key MDM market leaders with both IOS and Android platform support. IT can securely control content with behind the firewall Exchange syncing and administrative application policies – data can be secured when stored, encrypted in-flight and managed on mobile devices through our MDM partnerships.

Notate allows users to easily and quickly capture all their important information. With a rich text editor notes can easily and quickly created. Notate supports adding photos and images to your notes, information is now centralized in one easy to use application and with Notates Exchange syncing information is available across all your devices.

System Requirements:

- Notate Platform Support:
 - Apple iOS 8 & 9
 - Android v 4.4 and above
 - Windows OS 7 & 8
 - Mac OS 10.9 and above

- Exchange Server 2007, 10 & 13

Exchange Outlook Note and Device Syncing

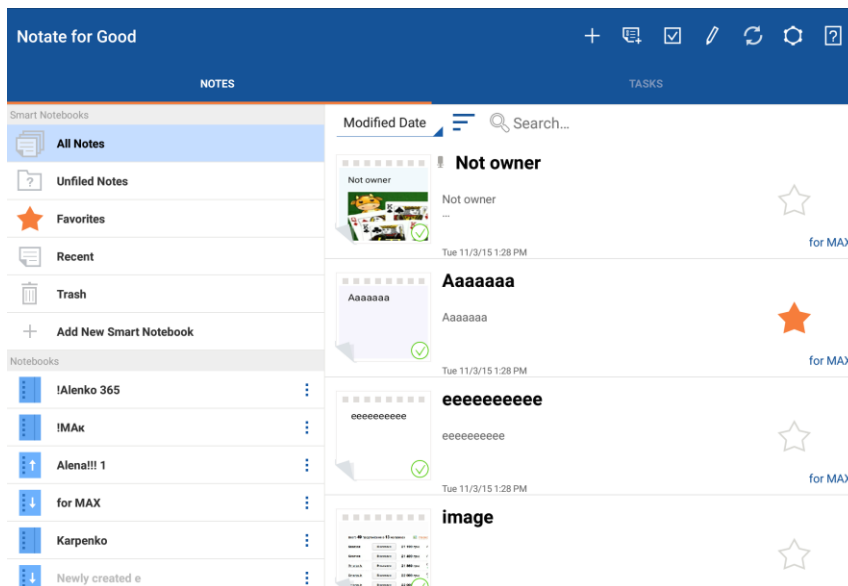
Notate supports note syncing with your Outlook account and other Notate enabled devices that have been authorized for use (IOS and Desktop). Your organizations Exchange URL should be auto-filled in the dialog box and to complete the Exchange set-up enter your email address and password. When authorization is complete your Outlook notes will automatically sync to your device. In some cases you may be requested to enter your domain user name and the Exchange Server EWS URL to complete the process.

Note: if your Exchange Server URL is not automatically “filled” contact your IT admin for the correct Exchange EWS settings.

Email Address	<input type="text" value="bill@exchange.com"/>
Password	<input type="password"/>
<input type="button" value="Connect"/>	



Important: After you have set-up syncing to your Outlook account, you will see a lighting bolt associated with your Notebook (green indicates that syncing has been completed). If you see a grey sync indicator, this means that your credentials are incorrect or communication has been lost between the device and Exchange. If you confirm your device has network communications the next step is to verify that your Outlook password has not changed, if so re-enter your Outlook user password into the exchange set-up dialog box to restore syncing communications.


Notate Home page



Getting Started with Notate

This user guide will provide you the information to start taking notes and organizing your information.

Create a new note: The first thing is to create a new note. To do this, tap on the “plus sign”  icon in the top right corner of the home page or the template icon  that provides pre-formatted notes as a starting point. To title the note, tap on the title field in the top middle of your blank note. The keyboard will automatically display. With existing notes anytime you want to bring up the device keyboard, just tap anyplace on the body of the note.

Closing or Saving a note: To close a note, tap on the back button in the top left hand  corner of the note. The note will be automatically saved and closed. To minimize possible loss of data, Notate will save your note in the background approximately every 20 seconds.

Across the top menu bar on the right these icons provide the following functions:



First are the undo and redo edit commands (arrows with half circles), the magnifying glass provides text searching within your notes, the microphone allows for the recording of audio into notes, the camera icon allows for inserting photo's into notes, the gallery icon provides access to the devices stored images, and trash can with a selected note and a tap will delete a note, and the final icon is the sharing icon for emailing and accessing other application services.

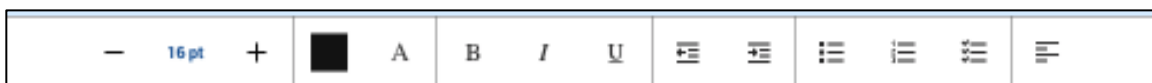
Text Editor: Notate supports a rich editor mode with many options available for text editing. Text formatting can be changed by selecting text with your cursor and clicking





the new format.

Text Edit tools

- Font size can be adjusted using the plus or minus sign.
- Font Color can be change using the color palette.
- Bold, italics & underline selection tools.
- Tabbing to the right or left for text
- List (bullets, numbers, and checkmarks)
- Alignment (left, center, right justified)

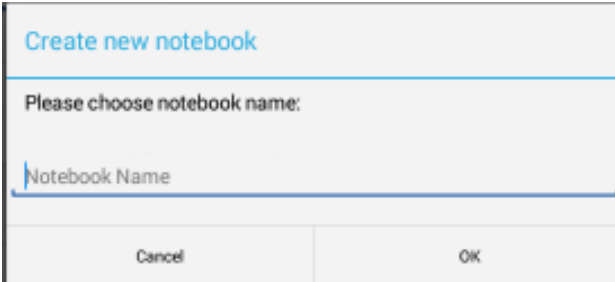



Deleting Notes

Notes are deleted by first selecting the note and tapping on the trashcan icon located in the upper right hand corner. This will move the note to the Trash notebook, but the note will remain stored on your local device. To delete the note permanently from your device, select the trash filter and tap “empty” icon  in the upper right hand corner in the Notate home page. Deleted notes in the trashcan can be restored by selecting the note and using the move note icon  to transfer the note to an active notebook.

Organizing your Notes

Creating new notebooks: To organize your notes into categories, Notate allows you create new notebooks that work like folders, notes can be added and moved in and out of various notebooks. To create a new notebook, tap the pencil icon in the upper right hand corner, select add new notebook, a dialog box will be displayed that will allow you to create the title of the new notebook.



Renaming notebooks: To rename the title of a notebook, tap the pencil icon  in the upper right hand corner, then press the pencil to the right side of the notebook that you are changing the title-a dialog box will display for changing the title – press Done when complete.


Deleting notebooks: To delete an existing notebook, tap the pencil icon in the upper right hand corner, then press the trash can next to the notebook you wish to delete. You will receive a confirmation message-press (OK) to continue with the deletion of the notebook. Caution, when a notebook is deleted all notes within the notebook are also deleted from your device.

Setting up Smart Notebooks: Smart notebooks are user created notebooks that allow for notes to be categorized automatically based on pre-defined search criteria. Any number of Smart notebooks can be created with text search filters or based on different types of attachments. To create a new Smart notebook, tap on the Add New Smart Notebook to bring up the dialog box to name and define your Smart notebook filters.

Create new smart notebook

SMART NOTEBOOK NAME

SORT BY

Title 

CONTAINS

Keyword

BY TYPE

Favorites

BY ATTACHMENT

Audio

Image

Video



Document

BY SHARING TYPE

Shared by you

CANCEL CREATE

When completed filling out your filters, tap on Create in the dialog box.

Favorite STAR setting: Notes that are used often or have special significance  can have a favorite tag (STAR) setting applied. All notes that are tagged with the STAR will appear in the Favorites notebook. To tag a note as Favorite - press on the STAR icon to the right of every note, the STAR icon will turn to a gold  color. To de-select a note from Favorites just re-press on the gold STAR icon.

Unfiled Notes: Under the All Notes notebook there exists an Unfiled Notes notebook. This notebook identifies any notes that have not been assigned a Notebook or exist in the root folder of the users Outlook client.


Note Text Search: Outlook support text searching for notes; this includes the titles, descriptions and the text body. To invoke the text search command - tap on the search bar and enter the text lookup word. To clear the search, tap on the “X” on the far right side of the search field.



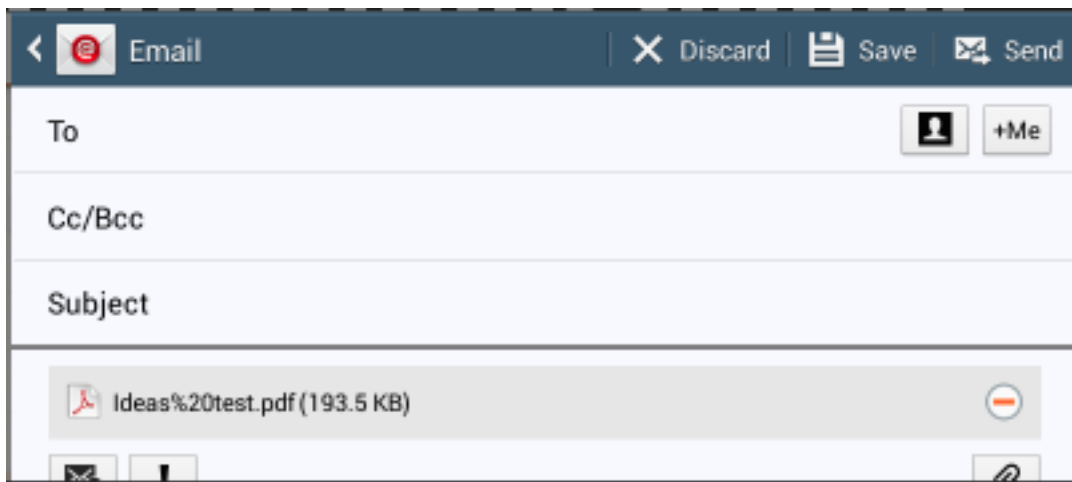
Sort note by title and dates: After a notebook has been selected, notes can be sorted by created date, modified date or title. Also Ascending and Descending options are available.

Sharing notes

When using any of the Notate sharing options your note will automatically be converted to the PDF format. This will allow handwriting and images to be displayed and shared in the note.


Emailing notes: To email a note, first select the note with a long press on the note till it is highlighted. Next tap the Android sharing icon  in the upper right hand corner. The menu of sharing options will appear with email usually on the top, select email – Notate will convert the note to the PDF format and bring up the email dialog box as shown below.

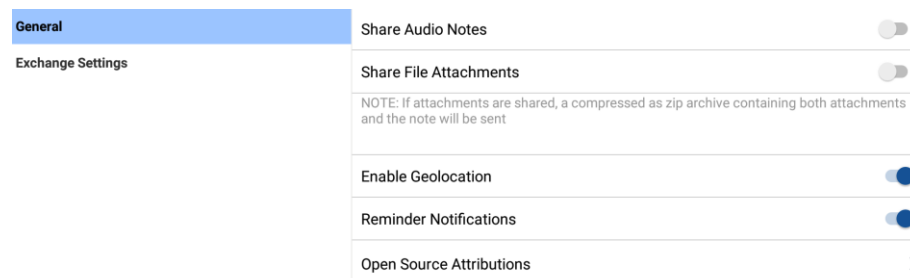
Note: This screen may vary on the device email client being used.



Within the Android sharing icon additional application services may or may not be available based on your organizations policy settings.

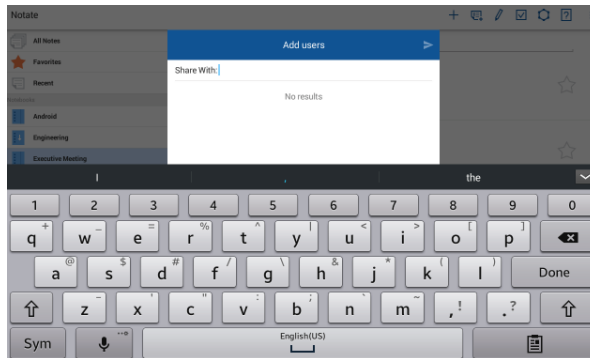
Sharing of audio recordings and file attachments:

Additional sharing options are available in the settings menu. Tap on the Settings  "gear" icon, and then select "General". The following screen will appear that allows you to turn on sharing for both audio recordings and file attachments. With this setting enabled your recordings and file attachments will be packaged into a Zip file for shared use in either email or through the Android connector.





Shared Notebooks (IT Admin Policy Controlled)

To set up a Notebook for sharing press and hold the notebook on the right hand side of the notebook near the 3 vertical dots. The Share button will appear right below. Press the share button to bring up the “Add Users” dialog box. This dialog box allows you to select team members based on their email address. The email address field will auto-fill from the Exchange global address book.



Each invited team member will receive an invite notification. Once accepted, the Shared Notebook will automatically show up as a shared notebook for this team member. Users can be added and deleted as needed by the Notate user who created the shared notebook. All notebook users have complete editing capabilities of individual notes.

On the Notate home screen shared notebooks are identified with a blue background icon. Shared notebooks that show an arrow up indicates that you are the owner of this

Shared notebook.  Shared notebooks that have the arrow pointing down show the notebook is shared to you by another team member. 

Settings

Accessing the settings menu in Notate provides the capability to set-up your exchange syncing and in the “General” menu selection turns Geo tagging on/off, file sharing of audio recordings and attachments and provide Notates disclosure of Open Source Attributions.

To set-up Exchange, enter your email address and password and tap the connect button. Exchange syncing with your Outlook notes will begin immediately if your device has network communications.

Email Address

Password

Getting Started with Notate Task

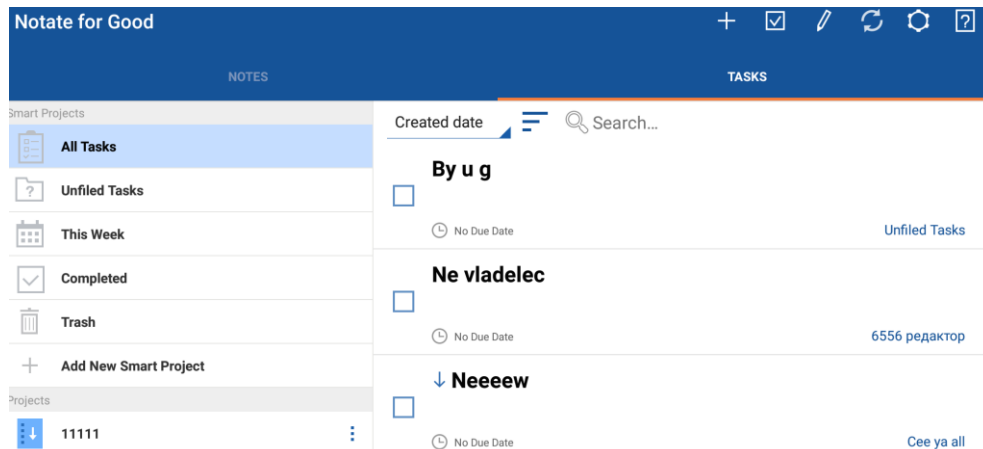
In addition to syncing all of your notes with Exchange and Outlook, Notate also supports syncing of Task on Exchange with viewing and editing in Outlook. The Notate task manager feature can be enabled in the application policy settings in the Good Dynamics administrator console.

Tasks can be organized in Projects and Smart Projects with custom filters and text searching is also available. All tasks are synced with Exchange and can be accessed from mobile devices with Notate installed.

To access the Notate Task manager just tap on the Task Button on the top of the Notate home page.



Notate Task Home Page



Creating a New Task

To create a new task tap on the “plus” sign in the upper right hand corner of the top menu bar. The task dialog box will appear. The task can be assigned a title and below additional space is available for a description at the bottom of the dialog box. The priority of the task can be set, with a Due Date and Reminders easily added. When the Due Date, Reminder, or Start Date is tapped a Calendar will automatically be displayed.

To close a task tap the “arrow” button in the upper left hand corner of the screen.

To mark a task completed check the completion box in the upper right hand corner.

New Task

Due Date
None

Start Date
None

Reminder

None
▾
None
▾

Priority

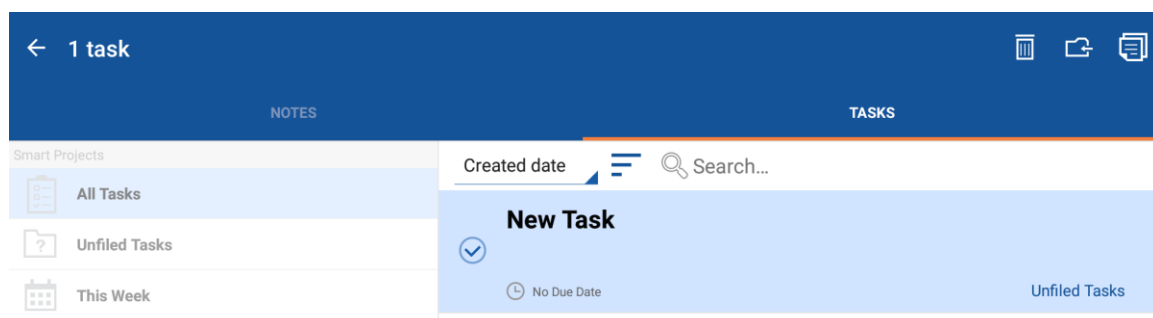
Normal
▾

#

Notate uses the Android notification process to provide user notification (reminders) of upcoming task due dates.

Managing Tasks

Editing and updating task is easily accomplished by tapping on the Task to bring up the dialog edit box. By making a long press on a specific task it will change to a blue highlight that will allow you to delete the task or move the task by using the icons in the upper right hand corner.



Sorting Tasks

Sorting and arranging task can be accomplished with a tap on the arrow above the task previews. Task can be sorted by Due date, Modified date, Completed date, Created Date, Priority, Title, and Custom. When selecting Custom sort, individual task can be arranged in the order by tapping on the 3 dots on the right hand side of task. The Task can be moved into any specific order.

Menu items Description

- All Task: Provides a list of any task that has been created, is still open or completed.
- Unfiled Task: List of any task that has not been assigned to a specific project.
- This Week: Displays all tasks that have a due date in the current week or has a past due date.
- Completed: List of all tasks that have been completed.
- Trash: Listing of all tasks that have been deleted.

Searching for Task


In the middle of the Notate task home page there exists text search field. The text search will search and display any matches in either the task title or description fields.


New Smart Project


The Smart Project folder allows for the set-up specific filters to manage projects and task assignments. To create a Smart Project filter tap on the New Smart Project menu button. The following dialog screen will display. The Smart Project filter can be named, and provides a set of filters for selecting specific task items.

Add New Smart Project

SMART PROJECT NAME

SORT BY
 Priority 

BY PROJECT
 All Tasks 

BY DATE
 None 

CONTAINS

BY PRIORITY
 Low
 Normal
 High

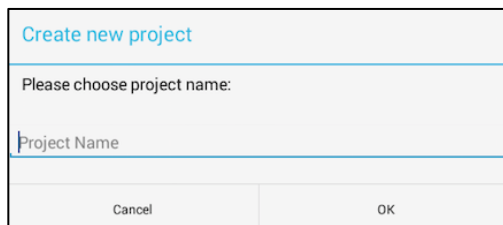
BY STATUS
 Incomplete
 Complete

BY REMINDER
 Has reminder
 No reminder

CANCEL CREATE

Creating a New Project

Task can be organized by Projects; any numbers of projects are supported. To create a new project first tap on the pencil icon in the upper right hand corner of the Notate home page. This will display the Add New Project menu setting. Tap on the menu setting to display the dialog box for creating a New Project or renaming existing projects. When this project is selected all new Task created will automatically be organized within this project.



Deleting Projects

Individual projects can be deleted from the menu list by tapping on the pencil first and then tapping on the individual trash can to the right of specific project.

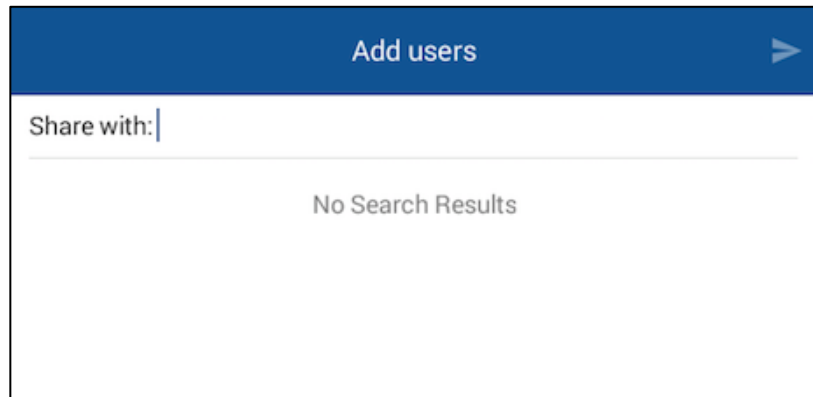
Creating Shared Projects

Notate supports team sharing of projects by user email addresses. All users must be in the same exchange domain. To share a project tap on the 3 vertical dots to the right of the project, the share menu item will appear.



Next tap on the share menu, this will display the following dialog box that will allow for sharing with other team members. To share the project, type in the email addresses of users, the address will auto-fill based on the email address on Exchange. Select the user and then tap on the right hand arrow to add them to the Project. All of the users will receive a Share project invitation that will have to be accepted for them to view/edit/add

task to the project.



Shared project are identified with an arrow in the blue background of the project. The Up arrow meaning this project was shared by the Notate device owner, and a down arrow indicates the Shared project was created by someone else on the team.

Contact Information:

Support: <http://support.shafersystems.com>