



# Matrix Logic WirelessDMS Suite Introduction

March 2014



## Table of Contents

<b>MATRIX LOGIC WIRELESSDMS SUITE INTRODUCTION</b>	<b>1</b>
<b>INTRODUCTION</b>	<b>3</b>
<b>WIRELESSDMS DEVICE SERVER</b>	<b>4</b>
WIRELESSDMS IPHONE CLIENT	5
WIRELESSDMS IPAD CLIENT	6
WIRELESSDMS BLACKBERRY CLIENT	7
GUIDED SEARCHES™	10
GUIDED PROFILING™	11
<b>WIRELESSDMS MOBILESYNC</b>	<b>12</b>
<b>WIRELESSDMS EMAIL SERVICE</b>	<b>14</b>
<b>WIRELESSDMS MICROBROWSER MODULE</b>	<b>15</b>
<b>WIRELESSDMS SUITE ARCHITECTURE</b>	<b>16</b>
<b>FURTHER INFORMATION</b>	<b>17</b>

---

# Introduction

This document introduces the latest WirelessDMS product suite from Matrix Logic.

Matrix Logic's Wireless Document Management Suite (WDMS) extends the reach of your document repository. It allows you access to key information from a handheld or wireless device. Now you can access your documents without starting up your laptop! WDMS allows IS staff to deploy wireless document access to many different users of many different devices, from one suite of software.

Over recent years, many organizations have deployed smartphones, wireless-enabled mobile devices and BlackBerry type devices to their users to facilitate better communication in or out of the base office.

Matrix Logic Corporation has a suite of products called WirelessDMS to allow access to Open Text eDOCS DM from most of these devices.

Over the last 15 years, WirelessDMS has continued to evolve to bring extra features to the mobile user as the features of the wireless devices improve.

Today, devices like the iPad provide an excellent platform for more than simple document searching and review. This is a continuing trend that Matrix Logic will be following closely.

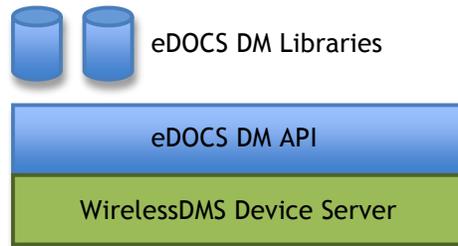
The explosion in the amount of devices in use in the Enterprise calls for some innovative solutions in software to access corporate data. Matrix Logic continues to provide this.



---

## Device Server

The Device Server module is a Web Services layer that runs between the document management system API (eDOCS DM API) and the WirelessDMS application running natively on the mobile device.



For example, an iPhone/iPod/iPad user runs the WDMS iOS application from the iTunes App Store on their device. This application connects over HTTPS to the WDMS Device Server's web services.

---

VPN: Using the VPN support on the iPhone/iPod/iPad, the device can connect to the WDMS Device Server that sits behind the corporate firewall, providing an enhanced layer of security.

---

The WDMS BlackBerryOS and BlackBerry 10 native clients connect via the BlackBerry BES server to the WDMS Device Server module. The transport is via the BlackBerry network, providing BlackBerry security.

The WDMS Android client connects via HTTPS or VPN.

Licensing is controlled from the WDMS Device Server.

WDMS Device Server requires Microsoft IIS and .NET Framework 3.5. It is a very lightweight component.

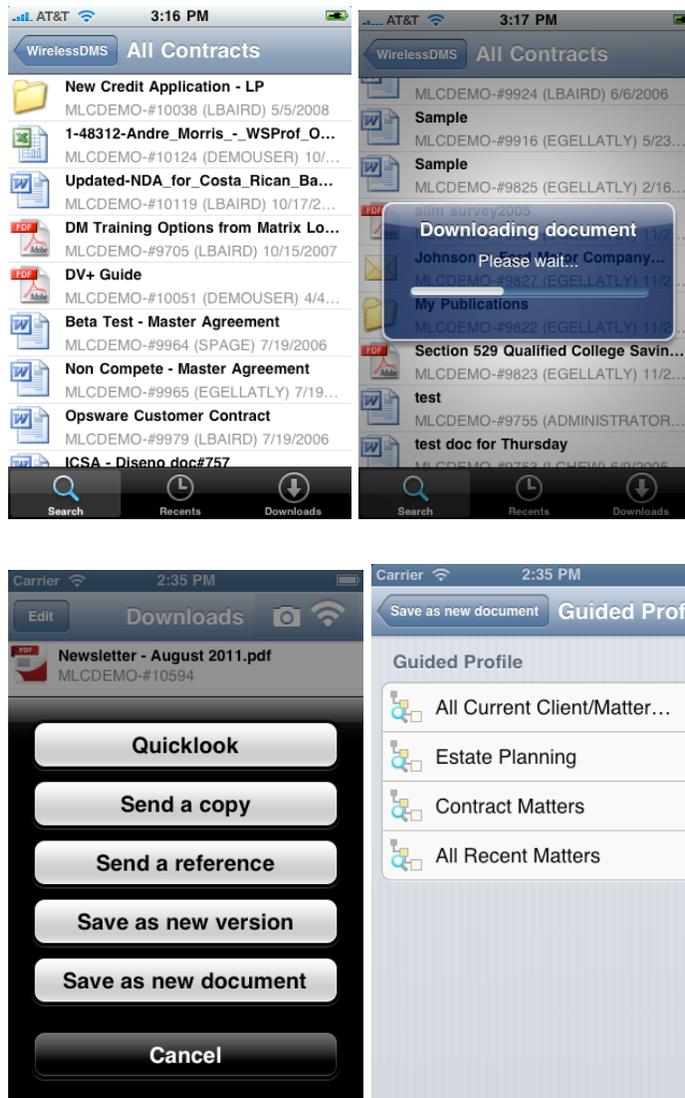
## WirelessDMS iOS Client on iPhone

This is available from the iTunes App Store as a Universal app.

This is an incredibly versatile WirelessDMS module, allowing search, view, email and download of documents for off-line viewing, cut & paste (text and graphics). This means you can take documents with you on an airplane trip for reference and review.

The iOS client now includes the ability to edit existing and save new documents. Integration with Photos allows you to save images to eDOCS.

All communication is via the WirelessDMS Device Server.



# WirelessDMS iOS Client on iPad

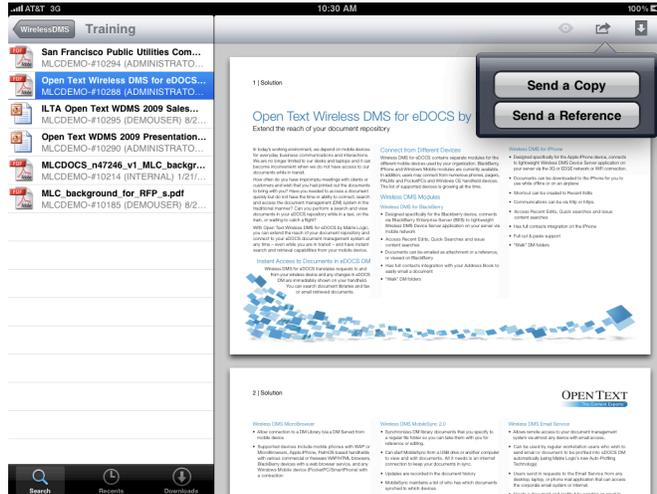
This is available from the iTunes App Store as a Universal app.

Since the iPad is used as more than a casual access tool, but for meeting notes, presentations, document reference and editing we have extended the features in WirelessDMS to bring a more comprehensive client to the iPad.

It supports the ability to open documents in other iOS applications, open DRFs directly on the device. In addition you can search, view, email and download of documents for off-line viewing, cut & paste (text and graphics). This means you can take documents with you on an airplane trip for reference, review and edit.

The iPad client includes the ability to edit existing and save new documents. Integration with Photos allows you to save images to eDOCS. You can search, mark up and save PDF documents from within the application.

All communication is via the WirelessDMS Device Server.



## WirelessDMS BlackBerry Client

One of the most popular additions to WirelessDMS is the native BlackBerryOS client.

This is a Java application that can be deployed to BlackBerryOS devices from the Enterprise BlackBerry BES server, Over the air download or desktop client.

Features in the latest version include searching, emailing and viewing of documents with full address book integration. The ability to open DRFs directly from email in WirelessDMS was recently added.

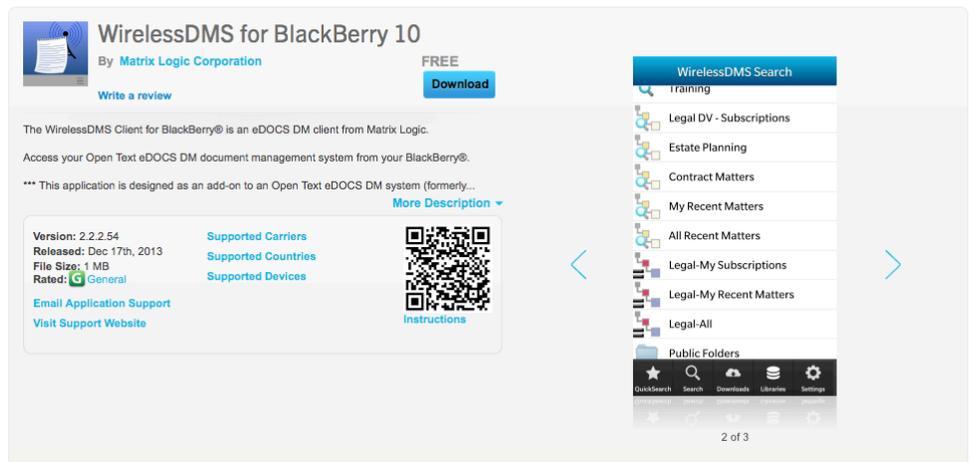
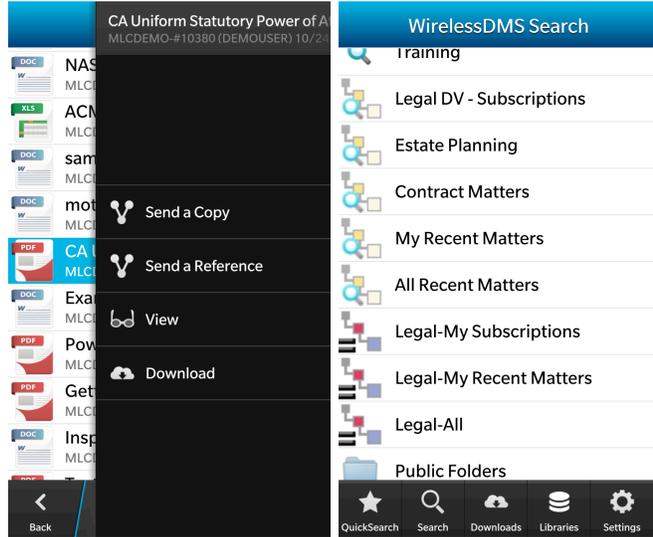
All communication is via the WirelessDMS Device Server.



## WirelessDMS BlackBerry 10 Client

WirelessDMS for BlackBerry 10 is a new DM client from Matrix Logic, specially for the BlackBerry 10. This application is loaded onto the BlackBerry device via BES or BlackBerry World and connects via BlackBerry Enterprise Server (BES) to a lightweight WirelessDMS Device Server application on your server via the mobile network.

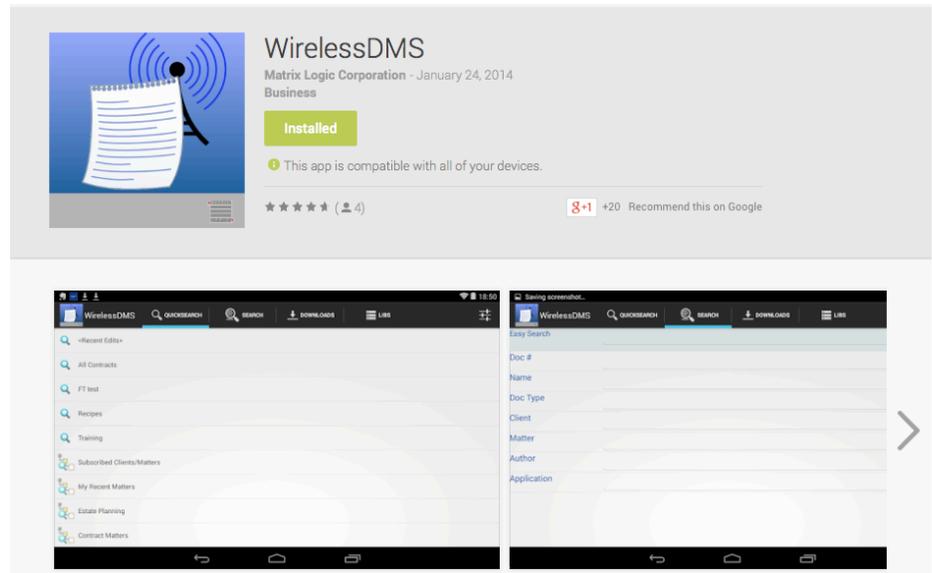
All communication is via the WirelessDMS Device Server.



## WirelessDMS Android Client

WirelessDMS for Android 2.x is a new DM client from Matrix Logic, specially for newer Android devices. This application is loaded onto the Android device via Google Play and connects via HTTPS or VPN to a lightweight WirelessDMS Device Server application on your server via the mobile network.

All communication is via the WirelessDMS Device Server.



## Guided Searches™

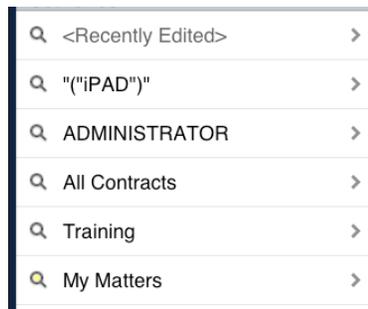
Guided Searches are a new feature in WirelessDMS native OS clients for the iPhone, iPad, BlackBerry.

Guided Searches are a new way of allowing users to find documents by metadata browsing with only a few taps while also keeping network traffic to a minimum for performance and cost reasons.

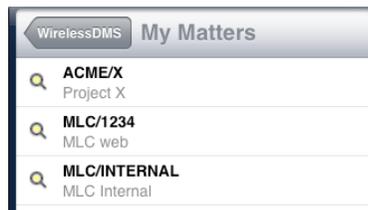
Using this feature, a DM administrator can provide users with searches like “My Matters” or “Recent Projects” using SQL queries to display relevant items only to the user (if desired). Since the administrator has full control of the query, the Guided Searches can even be populated with data from other database tables, views or even other systems (e.g. time tracking).

Each Guided Search is configured in the Guided Searches tab on the Device Server.

On the client, the user will see the Guided Searches underneath their Quick Searches and Recent Edits, identified with a special yellow search icon.



Selecting the Guided Search, shows metadata *for that user*:



Selecting the particular metadata will run a document search with that criteria and show a list of documents:



## Guided Profiling™

Following on from the Guided Search feature is Guided Profiling. This feature, first for iPad and now for iPhone and Mac OS X, allows incredibly rapid profiling and upload of new documents from the device into a DM library with just a few taps.

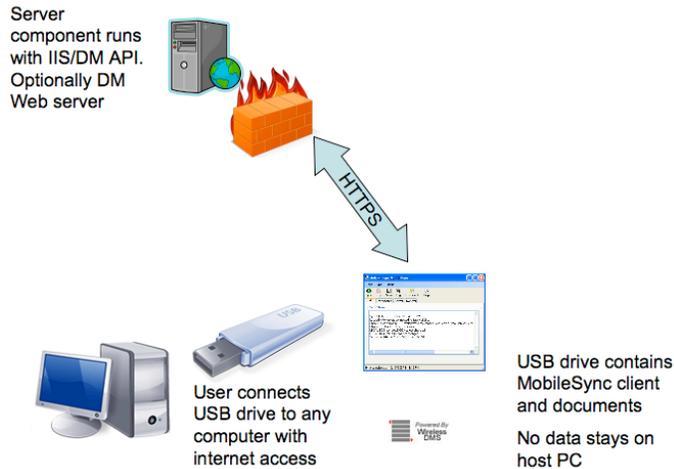
We turn the sometimes-tedious process of filling out a profile form into a “few taps and you are done”.

The image displays two screenshots of a mobile application interface. The top screenshot is a dialog box titled "Save as new Document". It has a "Cancel" button on the left and a "Done" button on the right. Below the title bar, there is a text input field labeled "Name (including extension)" containing the text "SMITH Power of Attorney amended.doc". Below that is a "Location" field with a button labeled "Tap for Guided Profile". The bottom screenshot is titled "Guided Profile" and has a "Save as new Document" button on the left. It contains a list of three items, each with a magnifying glass icon and a right-pointing arrow: "All Current Client/Matter Doctypes", "Estate Planning", and "Contract Matters".

This feature is similar to the Guided Searches feature introduced previously in that the administrator provides a series of search queries that provide a list of metadata for the user to choose from. Obviously, the user doesn't get to choose quite as much information as they would on a full eDOCS DM Profile in Windows Explorer DM Extensions, but they are also working on a mobile device.

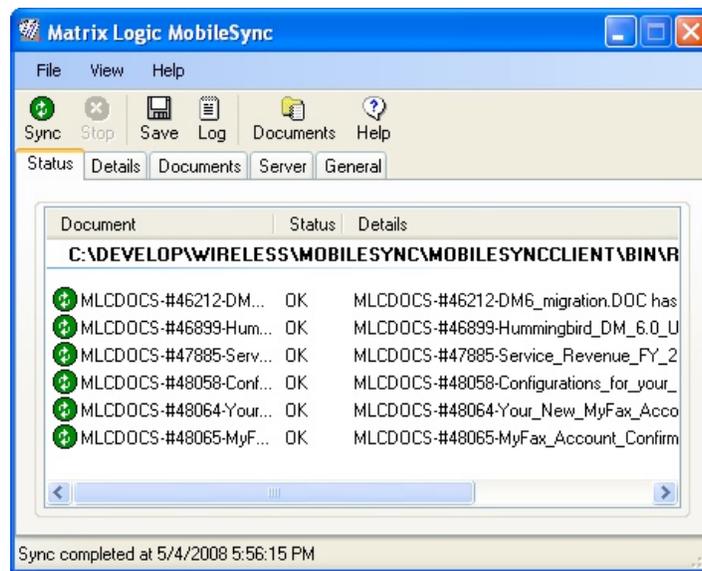
## WirelessDMS MobileSync

The MobileSync module is for the Windows user who may not even have a connection most of the time. MobileSync allows a user to synchronize a collection of documents over HTTP/HTTPS when they are connected. This is a bi-directional sync. Documents may be created or modified when disconnected. When a connection can be made, MobileSync will check in edits/new documents and download updates.



MobileSync requires NO application integration on the remote PC. It is a simple, small application that can even run from a USB thumbdrive, so you don't even need to take a laptop with you!

MobileSync consists of a small client application, a single file 'exe', and a MobileSync Server component that runs on Microsoft IIS, alongside DM Webtop if you already have it.



This module is also ideal for the user accessing Enterprise documents from a non-managed machine, perhaps their home office, an internet café or hotel business center. In many of these cases it is desirable to keep ALL data on a USB drive without leaving 'breadcrumbs' on the PC in use. MobileSync achieves this.

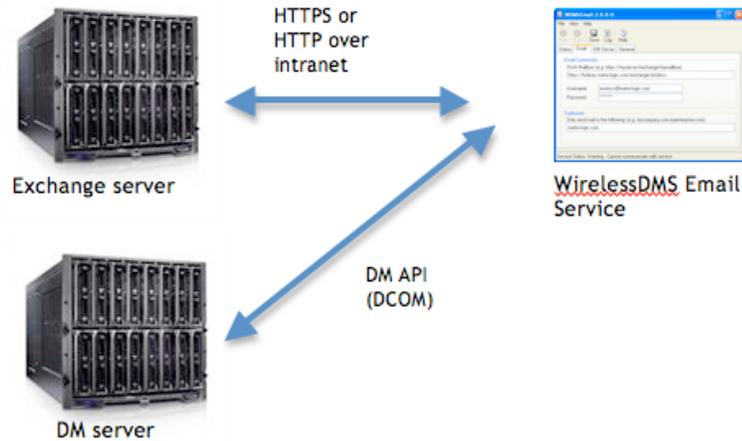
---

## WirelessDMS Email Service

The WDMS Email Service is a Windows Service that monitors a dedicated email account on your Exchange 2003/2007 server.

Email communication is via the Exchange web services API/ WebDAV, so MAPI and Outlook are NOT required. This makes for a much more robust, easy to configure solution. Usually, if you have Outlook Web Access in place, you are ready to go.

eDOCS DM communication is strictly through the eDOCS DM API.



Wireless Email Service waits for incoming email requests from users on mobile devices, or even desktop machines.

Typical requests to the WDMS Email Service are:

- Resolve a DRF document reference from an email attachment
- Create new documents in the DM system from an incoming email attachment.
- Search for a document.
- Retrieve a document and attach it to an email.

Some of the requests are from user emails, and some are inter-module requests from our native WDMS Device Modules (e.g. iPhone, BlackBerry).

This module uses the Matrix Logic AutoProfiling Service to enable users to create new documents without profiling them. The service intelligently profiles the incoming document on behalf of the user.

WDMS Email Server audits all user requests. Only requests from enabled users will be accepted. Responses will only be sent to authorized hosts as configured by the system administrator (e.g. [\\*@\\*](#), [\\*@acme.com](#), [\\*@mycompany.com](#))

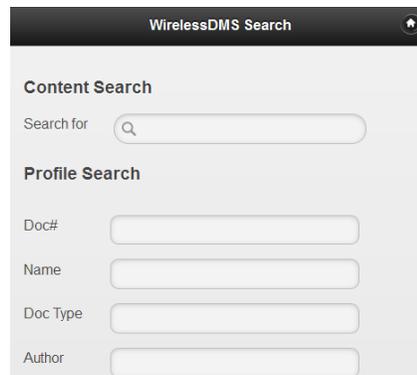
---

## WirelessDMS Microbrowser Module

One of the original modules of the WirelessDMS Suite, the WAP/Microbrowser module provides browser access from hundreds of different mobile devices, even desktop browsers. It now has enhanced support with version 2.0 for a wider range of smart devices such as Android, iOS and BlackBerry.

This module identifies the connected device and serves the appropriate features and format for that device, from the most basic late-1990's WAP browsers to the latest generation of rich browsers for iPhone, Palm Pre and Android. This assures that mobile users only see options appropriate for their device, and most importantly, network traffic is kept as minimal as possible for performance and cost reasons.

This is the ideal module for customers with multiple *different mobile device platforms* deployed.



The screenshot shows a mobile browser interface titled "WirelessDMS Search". It features two main sections: "Content Search" and "Profile Search". The "Content Search" section has a "Search for" input field with a magnifying glass icon. The "Profile Search" section includes four input fields labeled "Doc#", "Name", "Doc Type", and "Author".

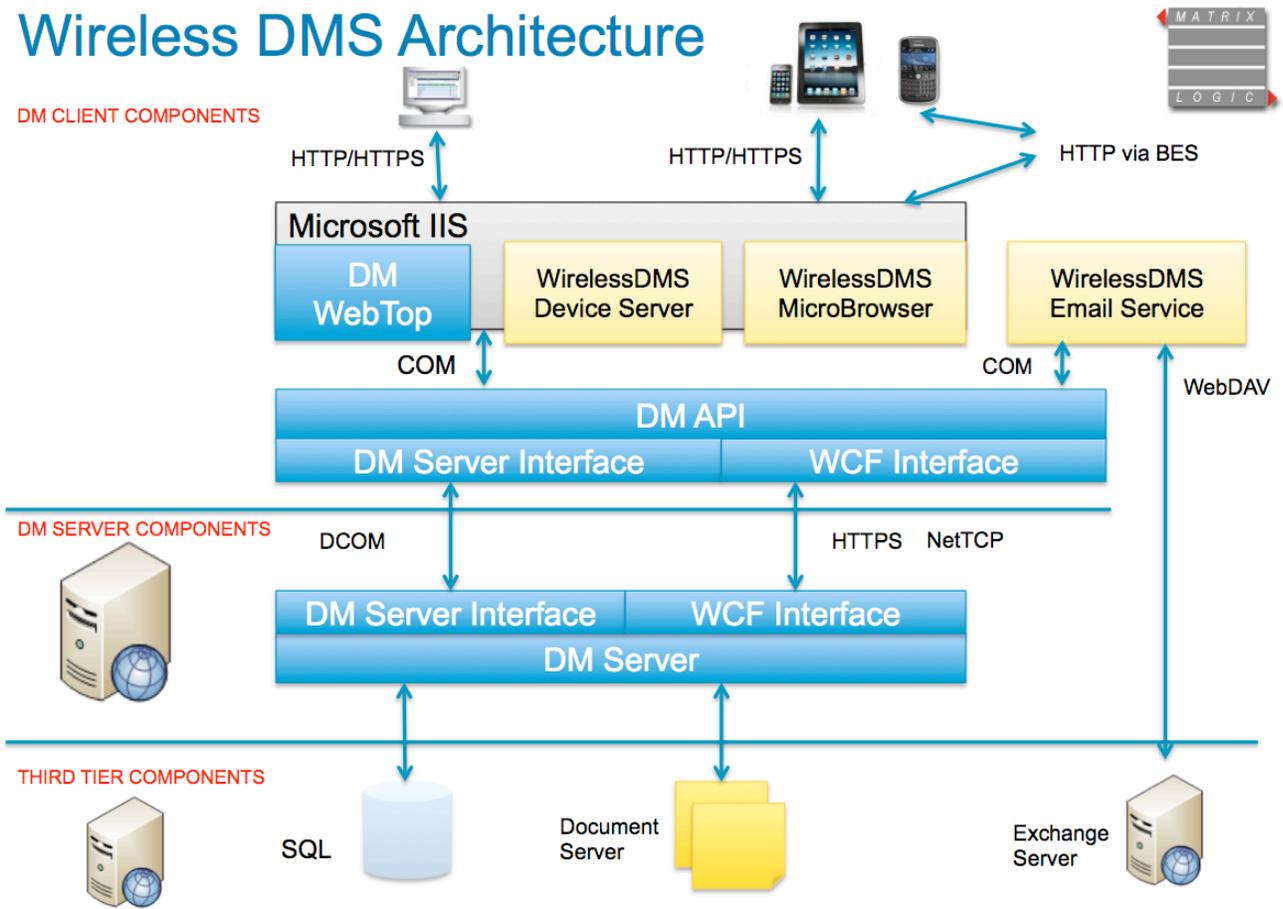
The Microbrowser module runs on Windows IIS and the Microsoft.NET Framework. Communication to the eDOCS DM system is via DM API. Requirements are similar to that of DM Webtop/CyberDOCS, except that it is lighter weight on server demands.

The WDMs Microbrowser module supports profile and content searching, view, download and email of documents (depending on device).



# WirelessDMS Suite Architecture

## Wireless DMS Architecture



---

## Further Information

For more information, contact your reseller or Matrix Logic Corporation.

<http://www.matrix-logic.com/wirelessdms>

Matrix Logic Corporation

+1 415 893 9897 tel

+1 415 893 9887 fax

[sales@matrix-logic.com](mailto:sales@matrix-logic.com)