



# goTRIM Pro

## Release Notes

*Version 3.0*

*Document Release Date: September 2019*

*Software Release Date: September 2019*



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Requests and enquiries concerning reproduction and rights should be addressed to:

Kapish Services Pty. Ltd.  
GPO Box 2676  
MELBOURNE VIC 3001  
t: +61 3 9017 4943  
e: [info@kapish.com.au](mailto:info@kapish.com.au)

## Table of Contents

<b>goTRIM Pro 3.0 Release Notes .....</b>	<b>4</b>
Overview of goTRIM Pro .....	4
goTRIM Pro 3.0.....	4
<b>New Features in goTRIM Pro 3.0 .....</b>	<b>5</b>
New Modern and Intuitive Design .....	5
Full Android Functionality .....	5
New Configuration Website for Administrators .....	5
New Notifications for Users .....	6
Latest Revision Notification.....	6
Document Preview .....	6
Status of Offline Records.....	6
Forced Check In .....	6
Removal of a Dataset Connection.....	6
Connection Status .....	6
Developed using the Content Manager Service API .....	7
Compatible with Micro Focus Content Manager 9.1 onwards .....	7
<b>Enhanced Features in goTRIM Pro 3.0 .....</b>	<b>8</b>
Enhanced Check In Options.....	8
Improved Security .....	8
<b>Features Removed from goTRIM Pro 3.0 .....</b>	<b>9</b>
<b>Technical Information .....</b>	<b>10</b>
Upgrading to goTRIM Pro 3.0.....	10
Licence Key .....	10
Software Compatibility Matrix.....	10
Removal of Support.....	10
<b>Support.....</b>	<b>11</b>

## **goTRIM Pro 3.0 Release Notes**

### **Overview of goTRIM Pro**

goTRIM Pro is the most advanced mobile Micro Focus Content Manager (CM) interface developed, enabling your staff to be as effective out of the office as they are in it. Integrating with your CM implementation, goTRIM Pro detects and displays a user's existing CM shortcuts including Recent Documents, Favourite Records and User Label selections (e.g. Due Trays).

The user-friendly interface allows for quick and easy record searching, providing multiple search options including the ability to browse via the Record Classification Scheme and direct access to user Favourites. It also provides users with the ability to edit Microsoft Office documents and annotate PDF files from the device.

Developed using the Content Manager Service API, goTRIM Pro follows standard CM authentication rules and enforces your existing business rules; ensuring user permissions and record security are maintained.

### **goTRIM Pro 3.0**

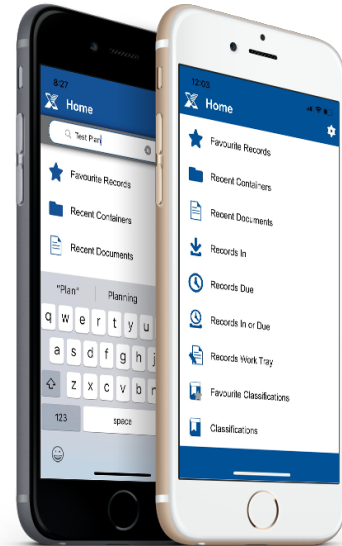
goTRIM Pro 3.0 is a complete re-write of the existing goTRIM application.

## New Features in goTRIM Pro 3.0

The new features available in goTRIM Pro 3.0 are available on both iOS and Android Devices where goTRIM Pro has been installed. The iPhone device has been used in this guide for demonstration purposes.

### New Modern and Intuitive Design

Completely redesigned to feel sleek and modern, goTRIM Pro focuses on simplicity combining form and function. The Top Level Folder Icons have been updated to reflect the new look and feel. Rest assured that as soon as you navigate away from the Home screen your Content Manager Icons will be displayed for the different Object Types.

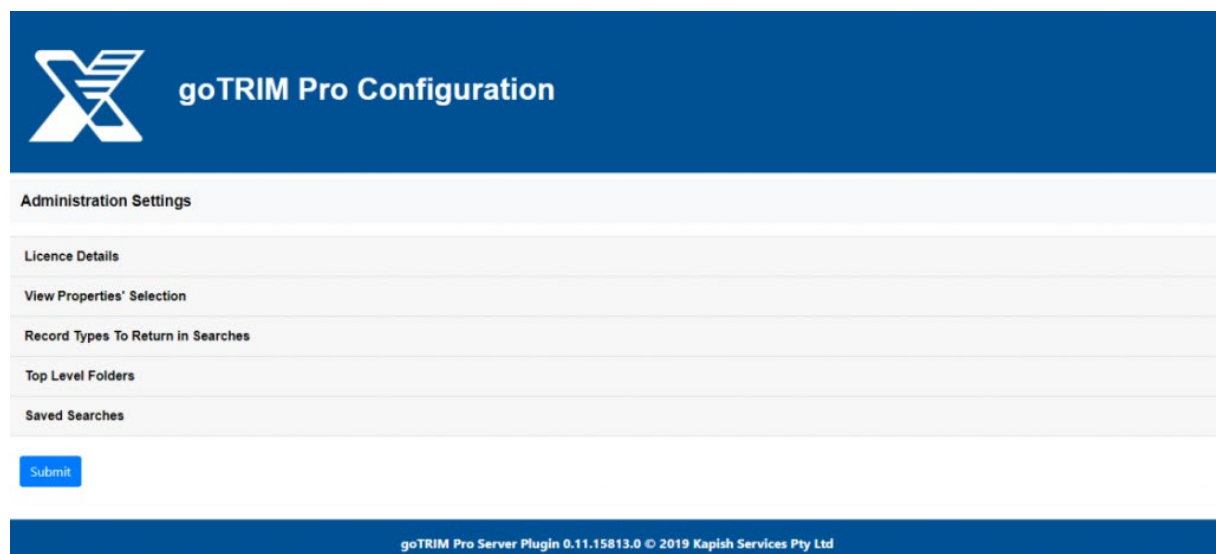


### Full Android Functionality

Never before has goTRIM Pro been able to provide the same level of features in Android until now. Being completely re-built on a new platform has opened up the feature rich options that were once only offered to iOS users including the ability to Edit Documents and Annotate PDF Files.

### New Configuration Website for Administrators

goTRIM Pro now has a shiny new configuration website dedicated for Administrators. Setting up goTRIM Pro for your Organisation is now streamlined and can be accessed from any computer inside of your network.



## New Notifications for Users

As part of the re-design we looked at the User Experience and the types of notifications Users received when inside of the App. We have made it easier for our Users by providing them with the most up-to-date information on their Records. The new notifications are listed below:

### Latest Revision Notification




As a User you will now receive a notification if you are not viewing the Latest Revision of the Document that is in your Offline Records.

### Document Preview

If a User has checked out, edited and saved a document, then went back to goTRIM Pro to preview the Document they will receive a notification to say that this preview doesn't include any changes they have made locally. Gone are the days of confusion as to why you are not seeing the latest changes made to your Document. Simply Check In the document and the preview will update to show the Latest Revision.

### Status of Offline Records

Now when viewing Documents in the Offline Records area of goTRIM Pro. Users will now see a status next to the title to explain what state the document is in.

-  **Downloaded** - On the device in read-only mode at the time of downloading, but not checked out.
-  **Checked out** - Checked Out specifically to this user on this device, so that the user can use the device to modify the record.
-  **Modified** - Both Checked Out, and in a state where the user has already modified the document with changes that might need to be checked back in.

### Forced Check In

As a User if you have a document checked out and an Administrator does a forced check in, the next time you go to Edit or Check In the document from within goTRIM Pro, you will receive a prompt advising that the record is no longer checked out to you. This happens before you have made any edits and risk losing work.

### Removal of a Dataset Connection

Now when removing a Dataset connection Users will receive a warning message advising that Offline Records will be deleted and Checked Out Records will be returned without changes. At this time the User will have the option to proceed removing the dataset connection or cancel.

### Connection Status

If for some reason goTRIM Pro cannot connect to a Network or to Content Manager a status message will now be displayed at the bottom of the App.

## **Developed using the Content Manager Service API**

Using the latest technology available, goTRIM Pro has been developed using the Content Manager Service API. With a more direct connection to Content Manager the app is more responsive than ever before.




## **Compatible with Micro Focus Content Manager 9.1 onwards**

goTRIM Pro is compatible with Micro Focus 9.1 onwards.

## Enhanced Features in goTRIM Pro 3.0

### Enhanced Check In Options

Checking In a Document? With goTRIM Pro you now have the same 3 Check In options provided in Content Manager available to you in the palm of your hand.

-  **Make a New Revision** - adds the returning document to the record and saves the older revision as a previous revision.
-  **Replace Current Revision** - returns the document and replaces the current revision.
-  **Discard any Modifications Made** - returns the document and discards any changes you made to the document.

### Improved Security

Security is important, and we have ensured that this latest release delivers further security enhancements with the re-write.

If Users are locked out of the app if they enter their pin incorrectly 3 times. The User will then need to revalidate themselves by entering their network credentials. Should the User get their network credentials incorrectly 3 times then they would be completely locked out for 1 hour. Subsequently should they want to update or remove their pin, they would need to enter the existing pin correctly to access these options. In addition there is now an idle timeout (auto lock) feature that will activate when a pin has been set to auto lock the app if the device has been inactive for 5 mins.

As with previous releases the storage of User Credentials are encrypted within goTRIM Pro.

When a connection to a Content Manager Dataset has been removed then all Offline Records are also removed as part of this process to ensure no access to a previous Users Records can be accessed.



## Features Removed from goTRIM Pro 3.0

There have not been any features removed from goTRIM Pro 3.0.

## Technical Information

### Upgrading to goTRIM Pro 3.0

The goTRIM Pro installer will not remove the old goTRIM server as goTRIM Pro 3.0 uses a different method of connection (Content Manager ServiceAPI). It is possible to have both goTRIM and goTRIM Pro running side by side.

The goTRIM Administration tool used with previous versions of goTRIM can be uninstalled as it is no longer required with the new goTRIM Pro 3.0.

### Licence Key

If upgrading from goTRIM Pro 2.x, a **NEW** Internal CM location **KapishgoTRIMProLicense** will be created automatically as part of the installation process. Settings from the previous License key **DO NOT** need to be entered into the new license key.

### Software Compatibility Matrix

Please see the goTRIM Pro 3.0 Software Compatibility Matrix for the recommended Operating System/s and Content Manager versions for use with the goTRIM Pro Server module.




**Existing Kapish customers** can download the relevant goTRIM Pro modules from <http://kapish.com.au>. The goTRIM Pro Application can be downloaded from the **Apple App Store** and the **Google Play Store**.

### Removal of Support

goTRIM Pro 3.0 is supported when running Content Manager 9.1 onwards. goTRIM Pro 3.0 is not supported where an earlier version of Content Manager is being used.

## Support

If you encounter any problems or need assistance installing or configuring goTRIM Pro please contact our helpdesk via one of the following methods:

-  **Website:** If you have the login details for Kapish Desk, go to <https://kapish.desk.com/login> and enter your email address and password. Once you have logged in you will be able to log and track support issues and enhancement requests logged with our helpdesk. This is the preferred method of contact.
-  **Phone:** +61 3 9017 4943 or 1300 KAPISH (within Australia)
-  **Email:** [support@kapish.com.au](mailto:support@kapish.com.au)