



User Guide – LINK 4.1 V1.4

This guide covers the basics of the LINK App from the end user perspective.

There is a separate guide for editing.

For additional guides and quick tips, please see our [Document Center](#).

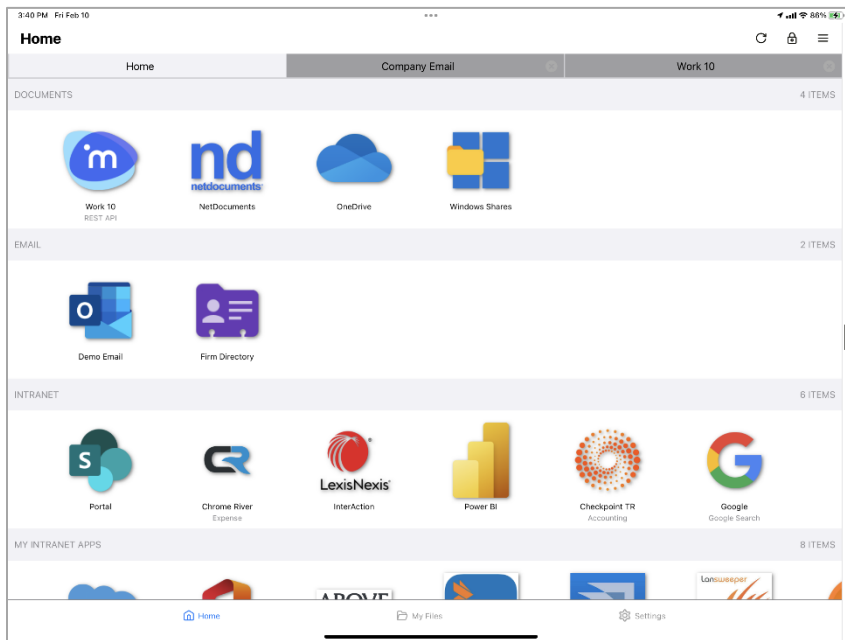
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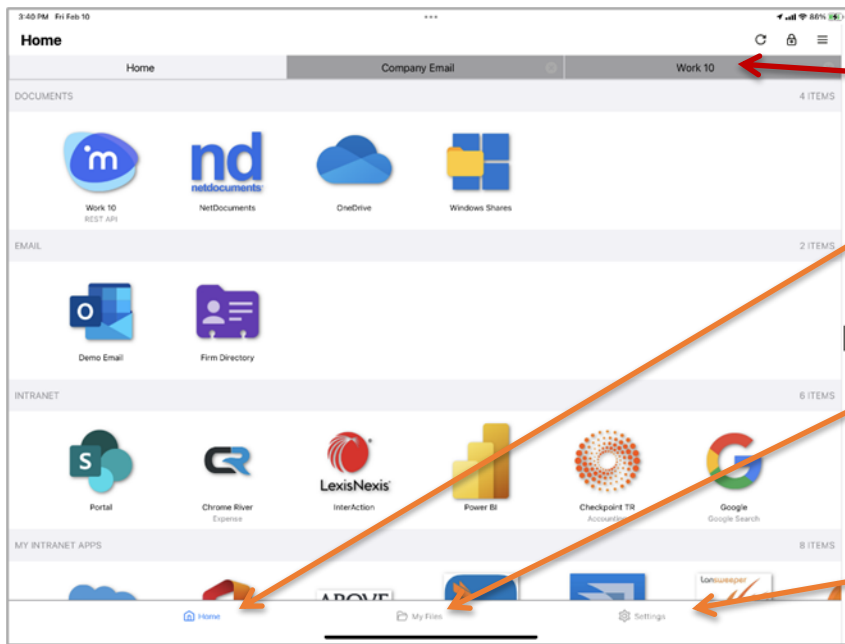
LINK Home Screen



This is your starting place, the LINK home screen.

Tap on a tile to use Outlook, Document Management, OneDrive, Windows files shares, My Files local storage, the firm portal, SharePoint, and web applications.

Home Screen Icon Legend



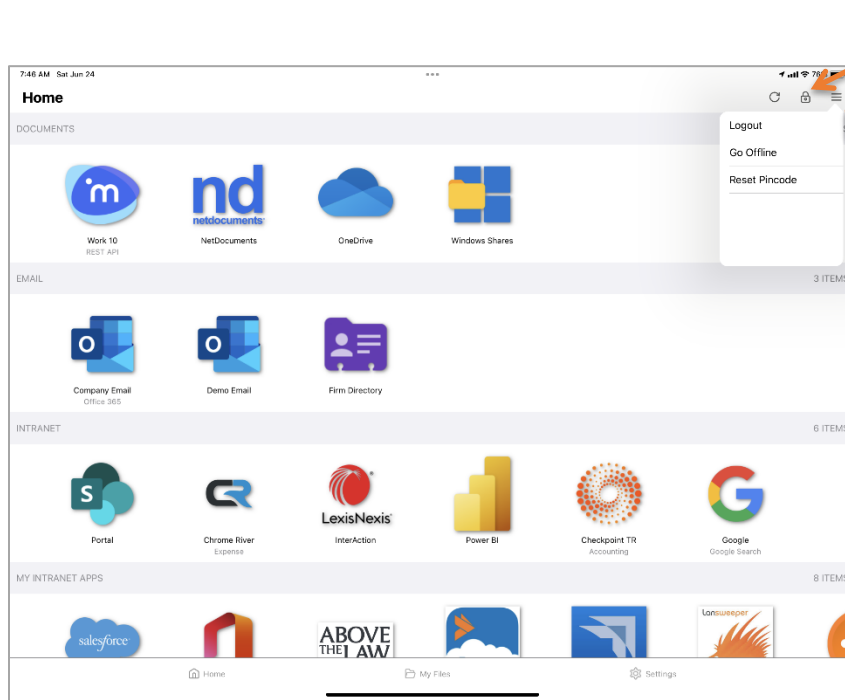
Tab Navigation
Use tabs to switch between open files and/or applications.

Home
Return to this Home screen

My Files
Local encrypted storage with offline and online access. Red badge indicates how many files are edited but not checked-in.

Settings
Set a default app, Grid or List Mode, clear browser cache, view app version, more

From the LINK home screen tap on a tile to use Document Management, Outlook, the firm portal and other resources.



Quick Lockout
Lock your device quickly. Use Touch ID or Face ID to re-authenticate.

Three-bar Menu:
 -Logout
 -Go Offline/Online
 -Reset LINK Pincode

Use the three-bar menu to:

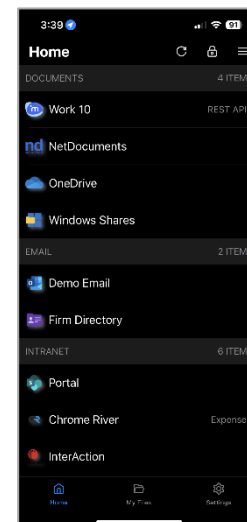
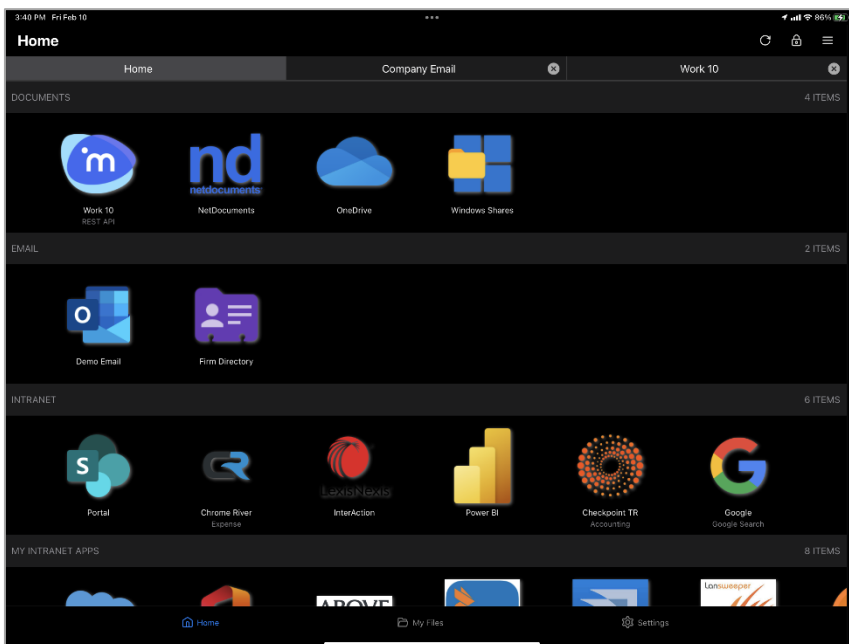
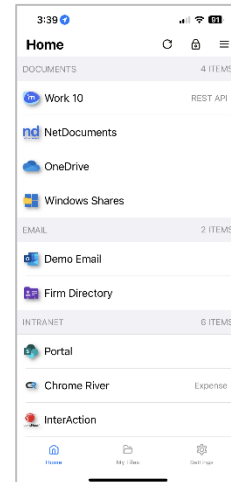
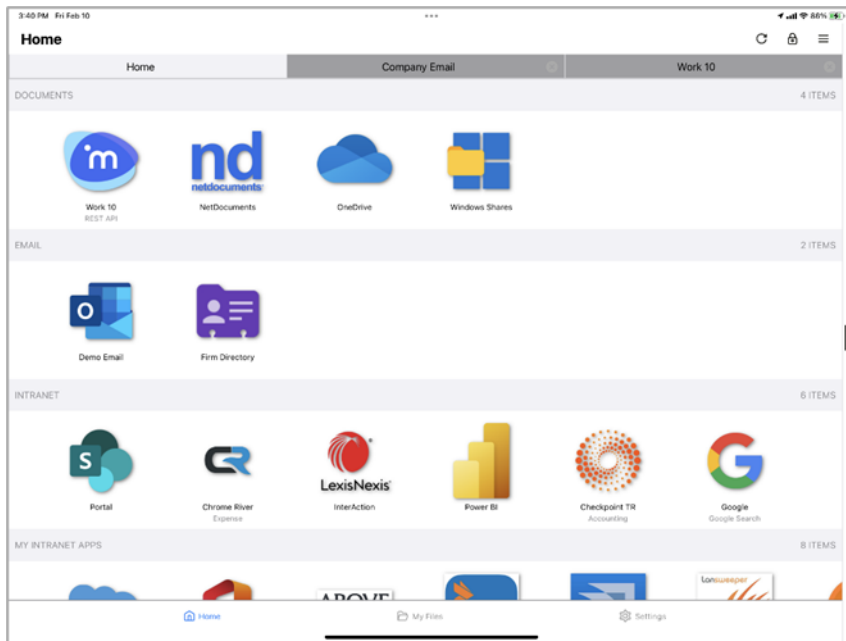
-Logout - your admin may ask you to do this occasionally if there is an update to the server software. This is a full logout which requires login with your Active Directory password or SSO. In contrast, the Quick Lockout uses Face ID or Touch ID to log back in.

-Go Online/Offline – will prompt you to login for Offline access.

-Reset your LINK Pincode. The LINK Pincode is rarely used. It is used when offline or as a last measure to log-in. Reset here or ask your LINK admin to reset from the LINK Controller console.

Grid View or List View and Light and Dark Modes

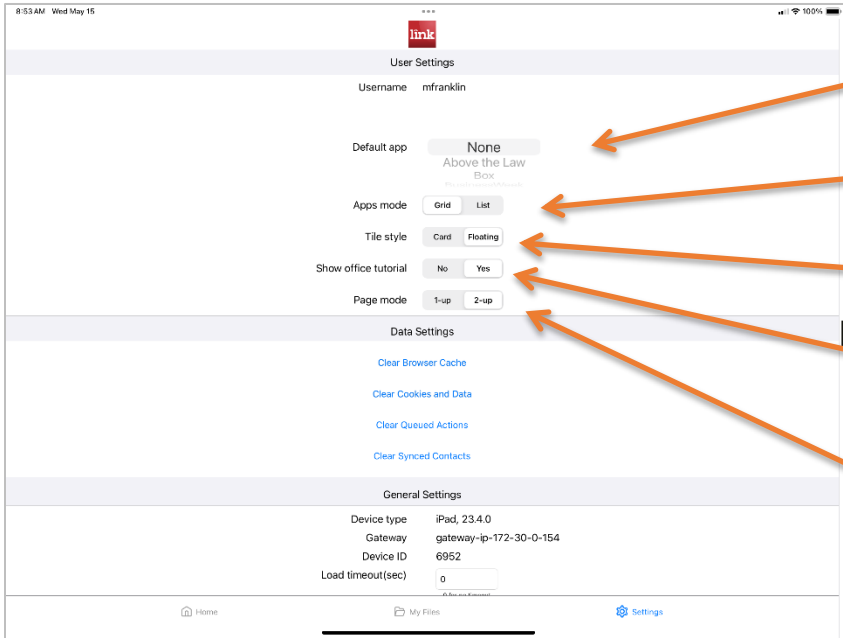
- I. The LINK Home Screen now supports Grid View (also known as the Tiles View) or List View. Change to Grid or List View from the LINK Home Screen Settings tab (see below).
- II. LINK supports the device OS Light and Dark mode in the device Settings (see below).



We suggest Grid View for tablets and List View for smartphones (to be able to thumb-scroll). It is strictly the preference of the user.

There are 4 total display options per device:
Grid Light, Grid Dark, List Light, List Dark

LINK Settings from the LINK Home Screen – Grid and List Setting



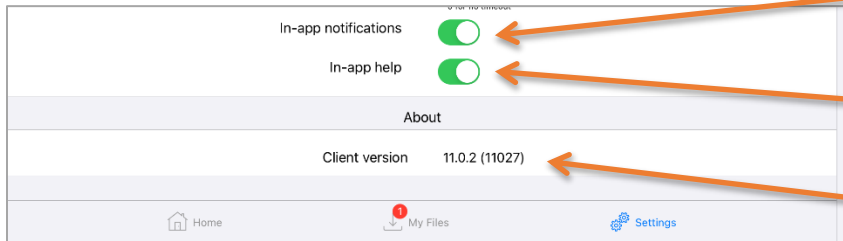
Default App
Set an app which LINK will open to automatically.

Apps mode
Select Grid (Tile) or List view

Tiles Style
Select Card or Floating style

Option to view Office Tutorial

Page mode
Display a file as 1-up or 2-up on iPads.
Note: this can also be changed in the PDF viewing settings.



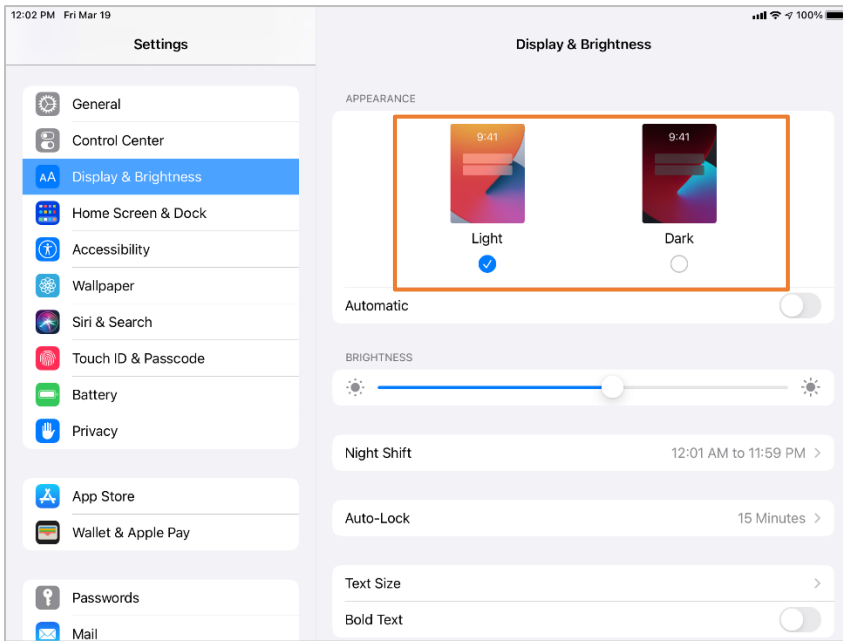
In-app notifications
Toggle on or off

In-app help
Toggle on or off

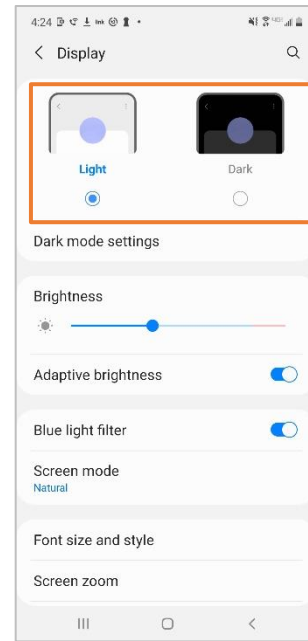
Client version
App version number

iOS and Android Light and Dark Mode Support

Light and Dark Mode are Set in the iOS “Display & Brightness” or Android “Display” Settings



iOS Setting



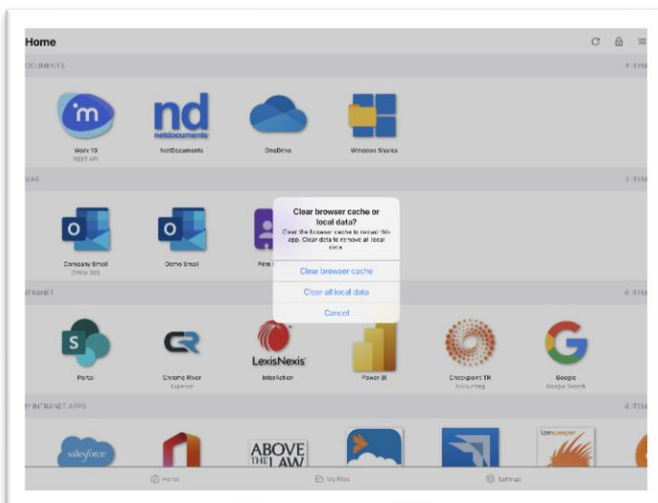
Android Settings

Quick Fix Tip

1. If an app is not rendering properly, “Clear browser cache.”
This takes seconds.
2. If an app is not syncing properly or if you are experiencing something which was not fixed by #1, then “Clear all local data.”
This reloads all of the data in the app from the server. Therefore, it could take minutes to reload.

Always try “Clear browser cache” first.

See the [Troubleshooting Guide](#) for more tips.

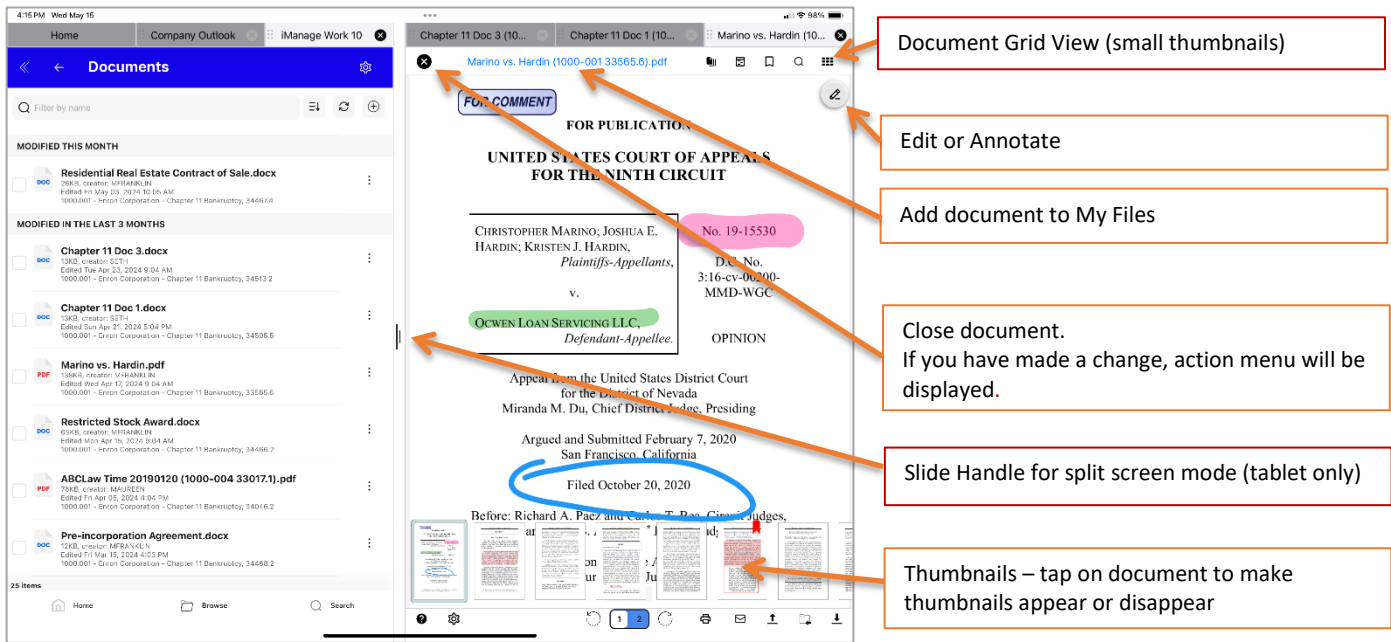
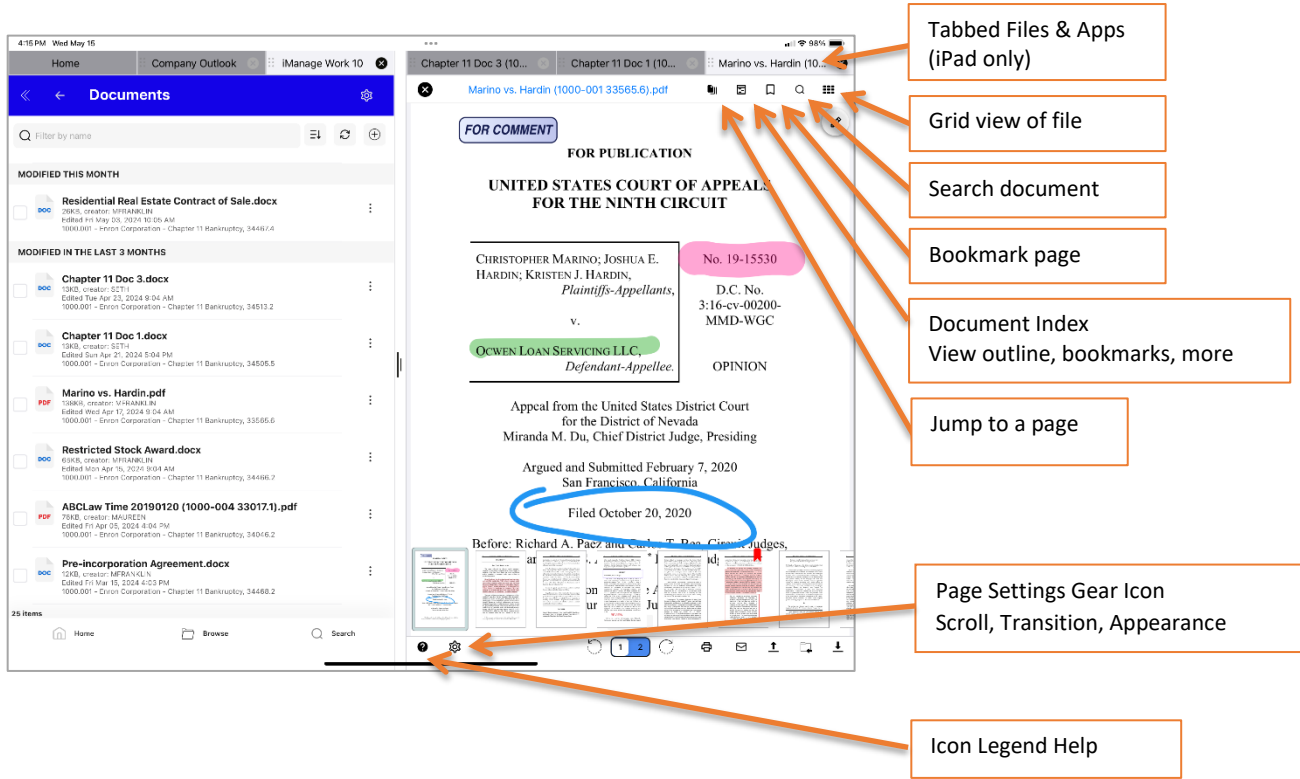


Press and hold on the tile icon for the appropriate app. Menu will appear.

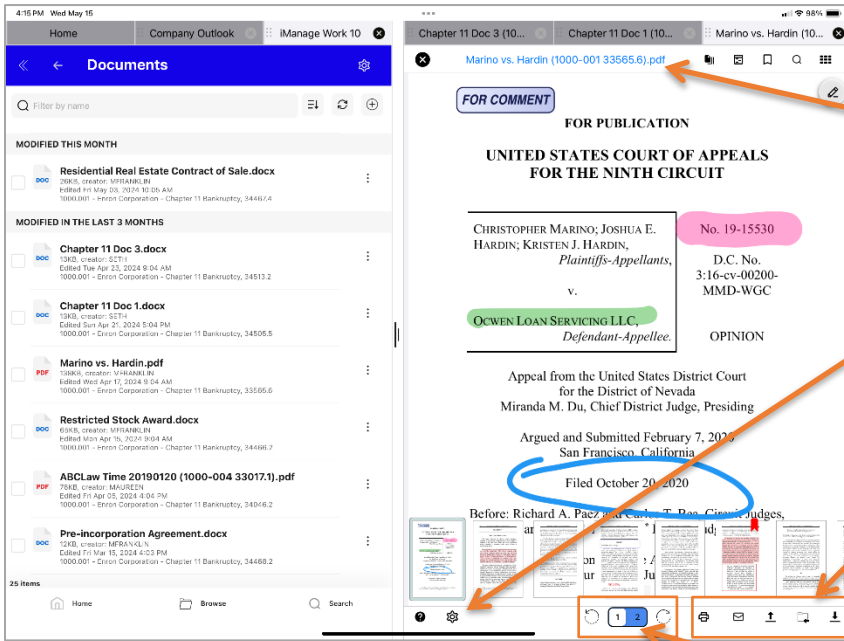
Select “Clear browser cache” or “Clear all local data.”

LINK Document Viewer Features

Wherever you open a document in LINK: DMS, another File Share, My Files, or as an attachment to email, the document will open in the LINK Document Viewer, as shown below.



PDF Page Settings and Action Icons

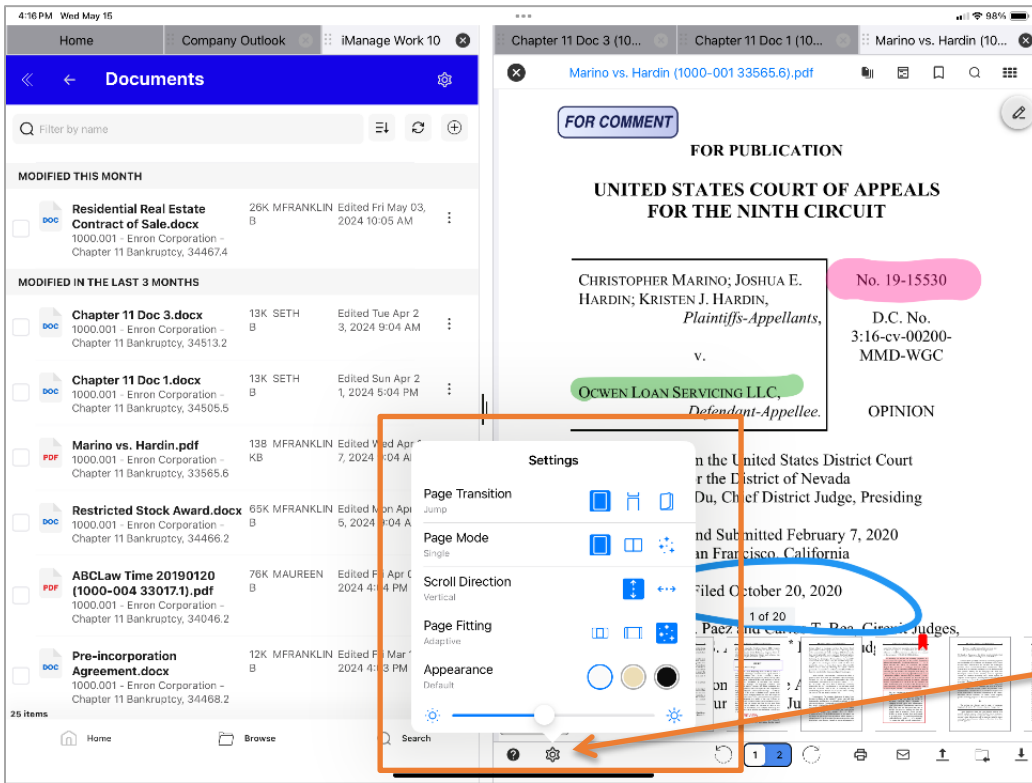


Add document to My Files
 Tap on this link to organize in My Files. You can add the document to a current folder or create a new folder.

Settings for Page View – detail below

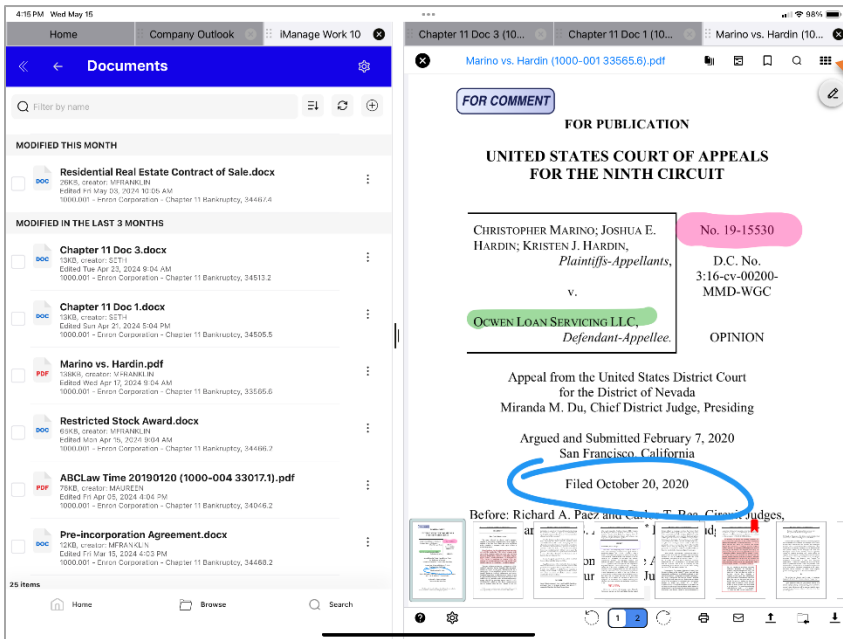
- Document action icons, left to right:
- AirPrint
 - Email
 - Import/Check-in to DMS / ECM
 - Save to a folder in My Files
 - Save to My Files

View pages side by side or one page at a time.



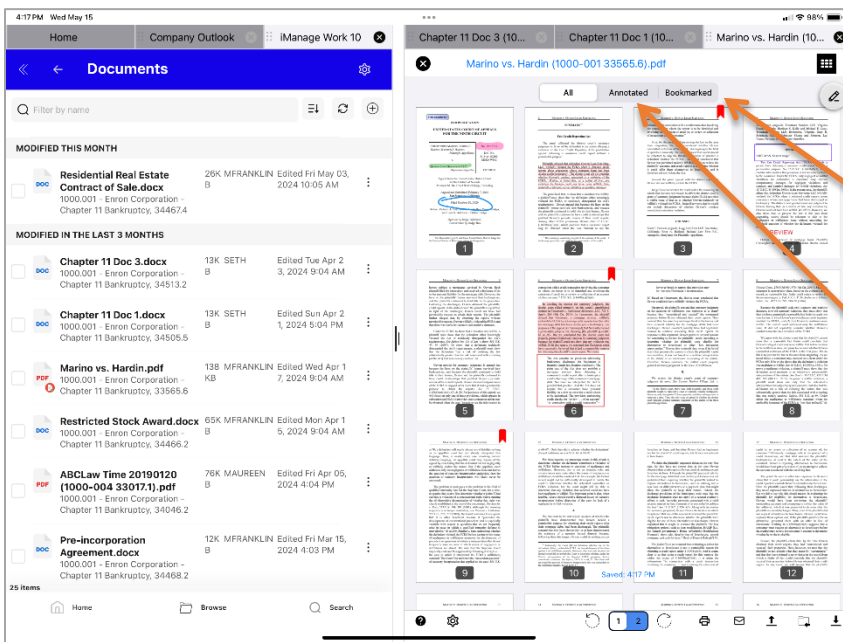
- Settings for Page View:
- Transition – how the page will move on screen
 - Mode - number of pages displayed
 - Scroll Direction
 - Fitting – zoom in or out
 - Appearance - Light or dark mode
 - Brightness Level

PDF Grid View and "Document Edit"



PDF Grid View / Return to Page View
Tap to go to Grid View.

Grid View



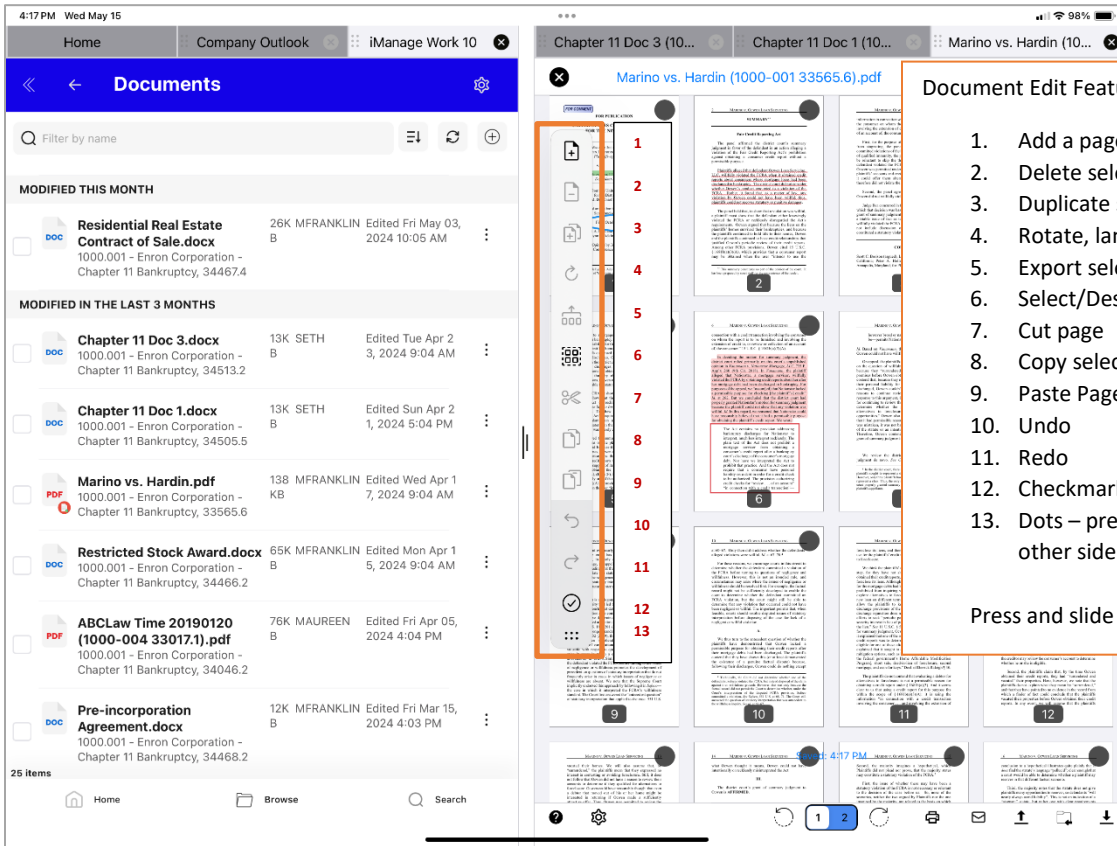
Document Edit Menu
When you are in Grid View, tap the Pencil to display the Document Edit Menu (shown below).

Display Bookmarked Pages Only

Display Annotated Pages Only

Document Edit Menu – Manage PDF Pages

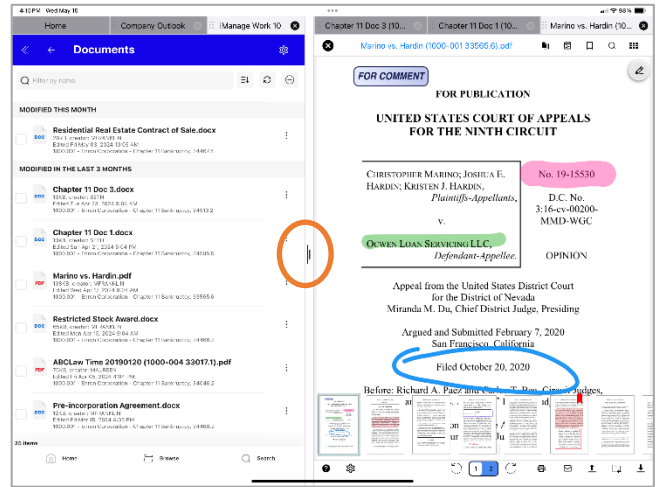
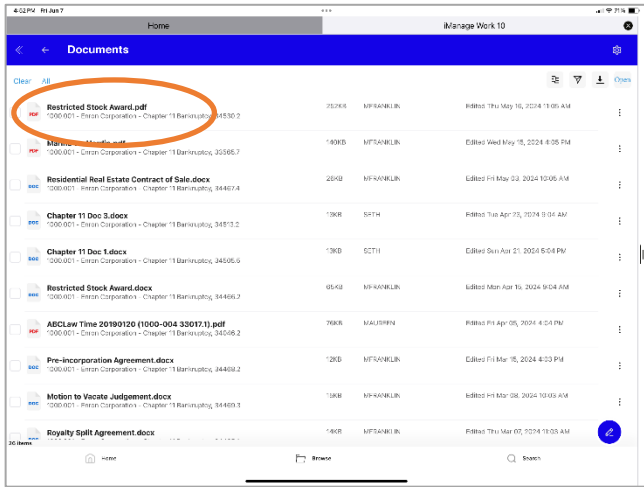
These features are known as “Document Edit.” Here you can add, subtract, move pages, and more.



- ### Document Edit Features
1. Add a page
 2. Delete selected page(s)
 3. Duplicate selected page; paste to right
 4. Rotate, landscape or portrait
 5. Export selected pages
 6. Select/Deselect all pages
 7. Cut page
 8. Copy selected page(s)
 9. Paste Page(s) (paste cut, copied pages)
 10. Undo
 11. Redo
 12. Checkmark – Close menu
 13. Dots – press and drag to move menu to other side
- Press and slide to move a page.

Multi-tasking with Split Screen Mode

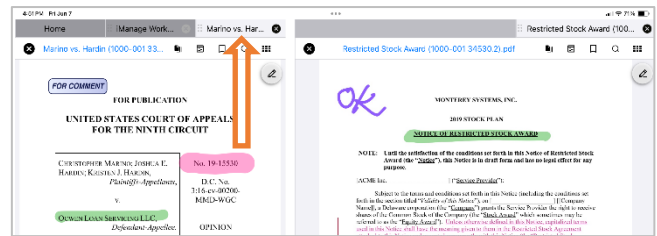
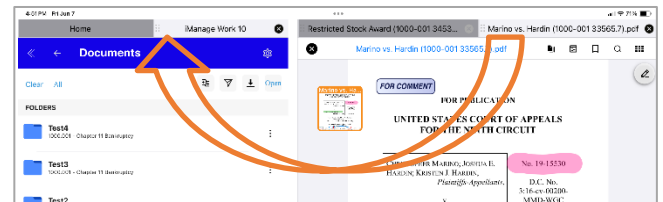
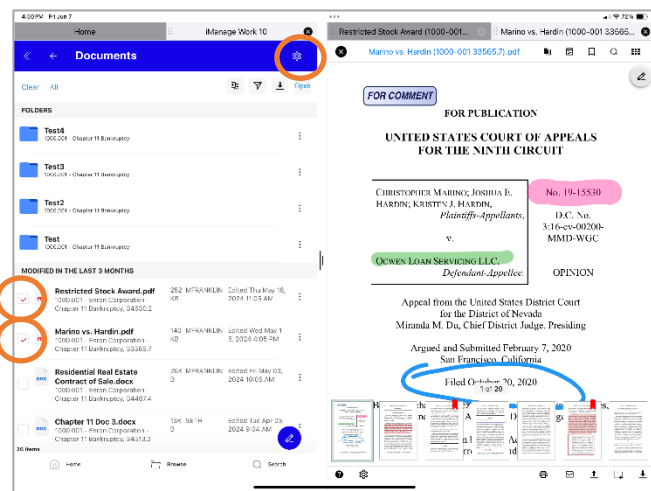
Use Split Screen Mode and Multi-tab View in DMS or Other File Share



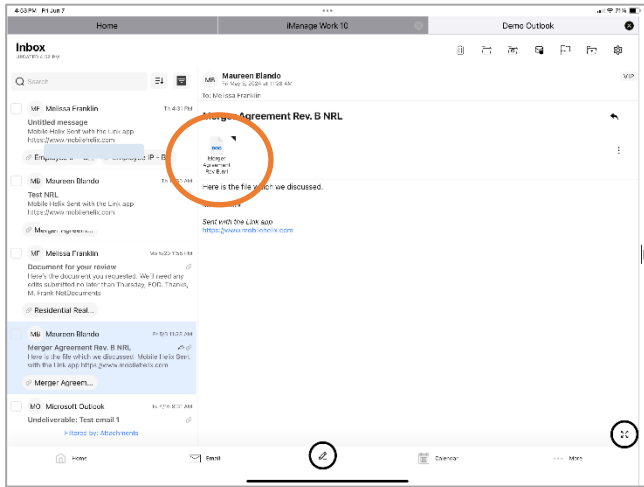
From a folder, tap on two or more files to open in multi-tab view.

Split screen is currently supported for iPad only.

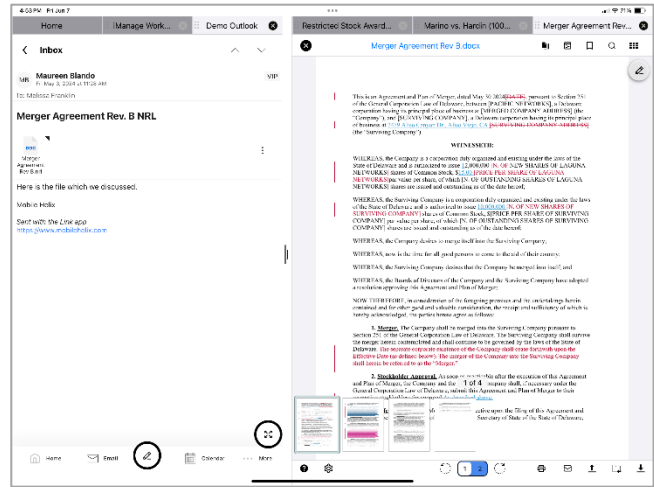
Adjust split screen ratio by pressing and dragging slider handle.



Use Split Screen in Email

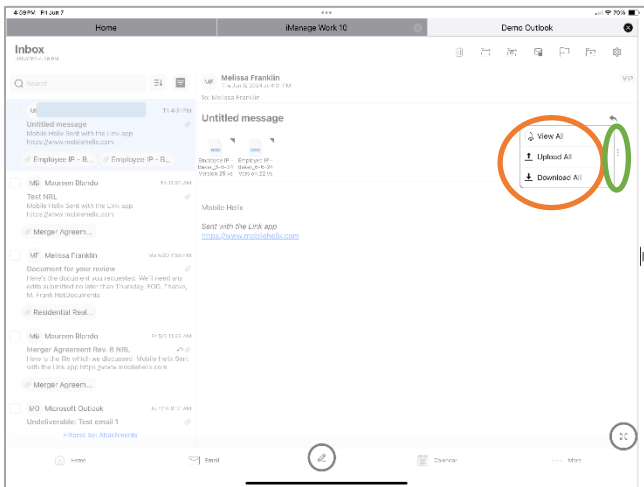


Tap on attachment to open it.



File will open on the right side.

For iPads only.



When there is more than one attachment:

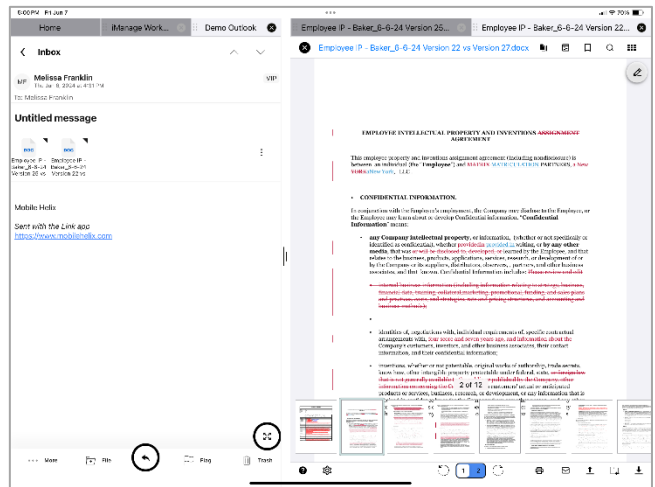
-Tap the Ellipsis menu (green)

-Select:

View All – to open all files

Upload All – to import to DMS

Download All – to save all to My Files

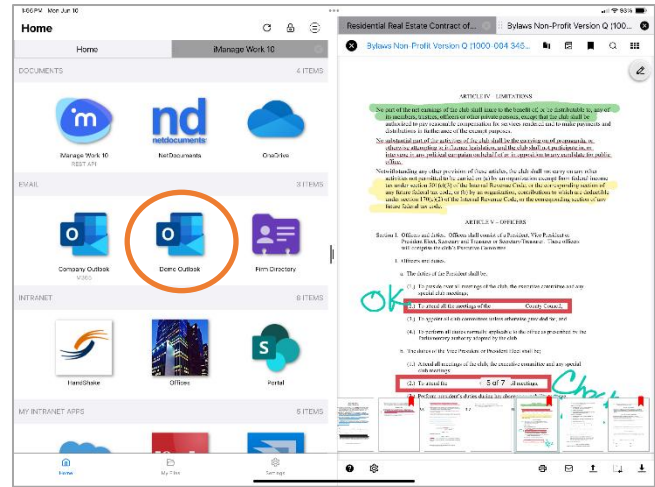
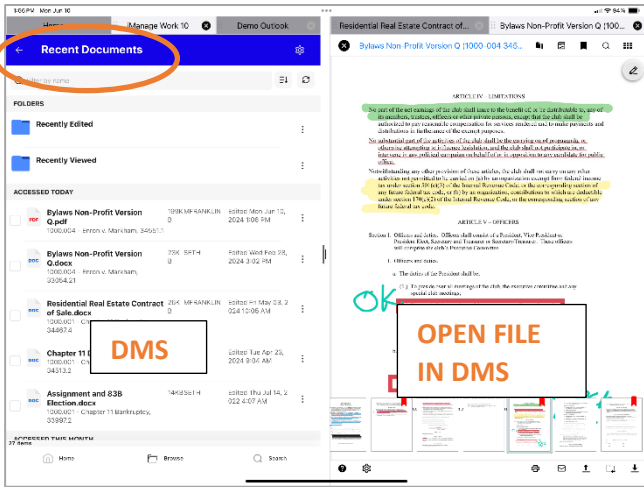


The files will open in tabs on the right.

You may press to drag and drop files and applications from one side to the other.

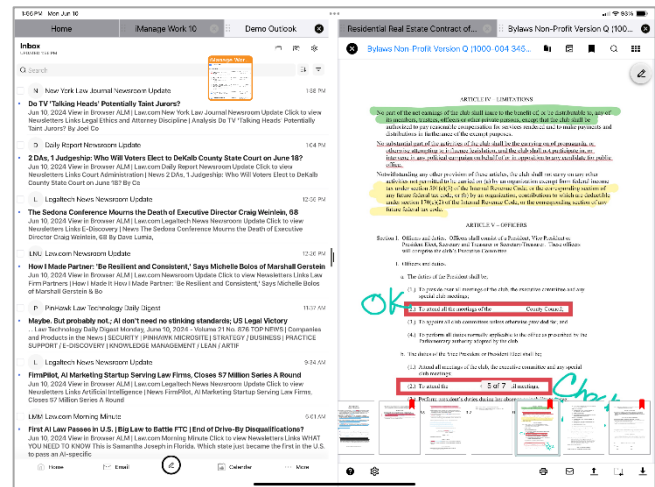
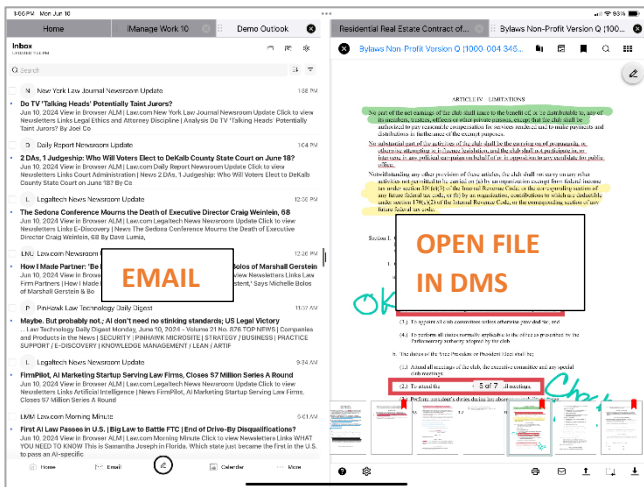
Use the Home Tab to Navigate to Another App in LINK – iPad Only

Use the “Home” tab to go back to the LINK home screen and navigate to another application or resource.



Tap the “Home” tab to go to the LINK home screen.

Now from the Home Screen on the left, tap the Outlook Email tile.



Email is open on the left.

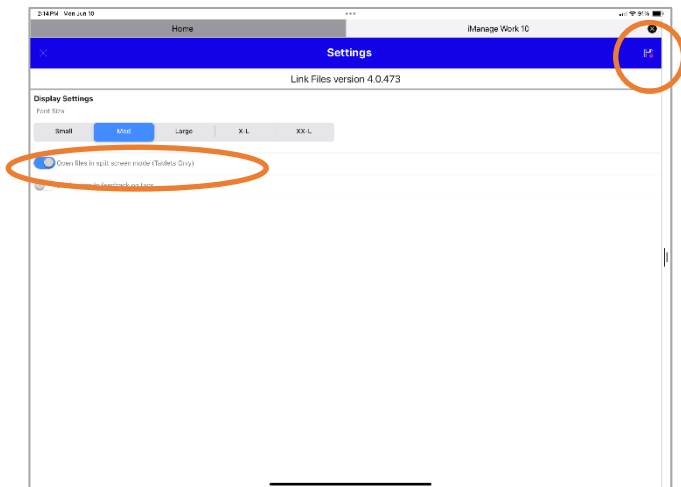
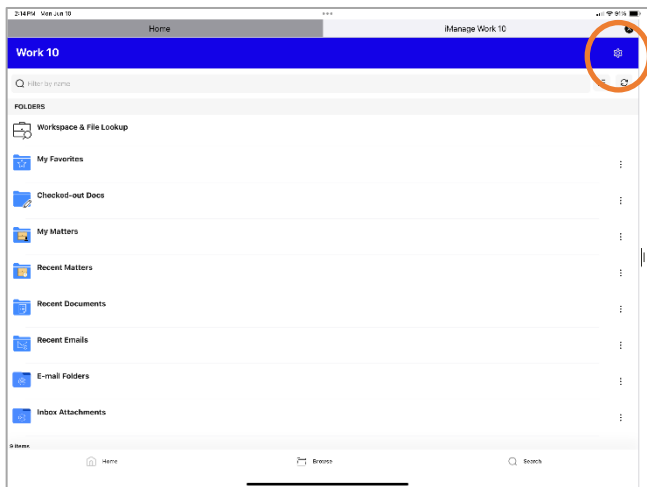
DMS is also open in a tab on the left.

You may press to drag and drop a tab to the other side.

Turn Split Screen Mode Off and On

Split Screen mode is **on** by default. Toggle Split Screen to be **off** by default.

The Split Screen handle is always present on the right to use when needed.

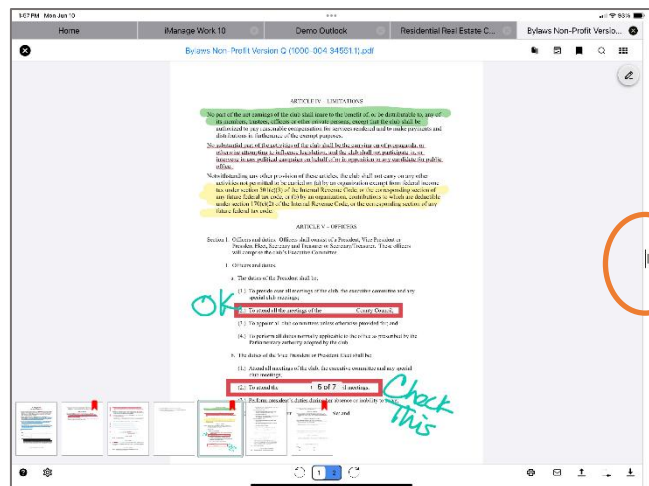
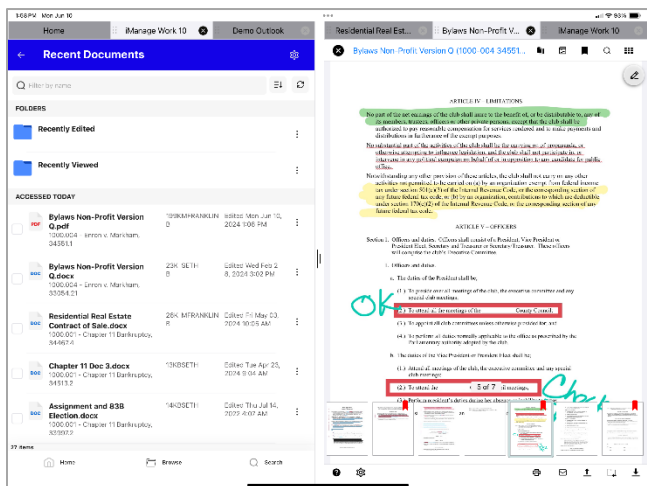


From the DMS folder view, tap the Gear icon.

Toggle “Open files in split screen mode” to off or on.

Save, tap Diskette in the upper right.

Note: Split Screen mode is **on** by default



Split Screen mode is on.

Split Screen mode is off.

Files and apps appear on two screens.

Only one file or app is displayed, however, multiple files may be open in the multiple tabs at the top.

Files and apps may be dragged and dropped to the other side.

View two pages: Tap the Gear icon > Page Mode > Double

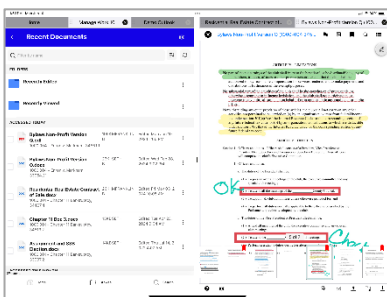
Tips for Using Split Screen

Split screen: Slide all the way to the right

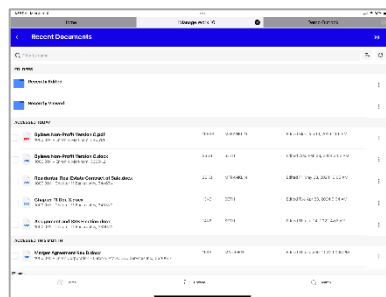
When you slide the split screen handle all the way to the right, the tabs on the right are not closed or lost. Think of it as those tabs moving off the screen to the right.

When you slide the split screen handle back to the left, those tabs will reappear.

Also, because sliding to left from the far-right position clones the open tab on the left, you will also have a new tab on the right which is a clone of the screen on the right.

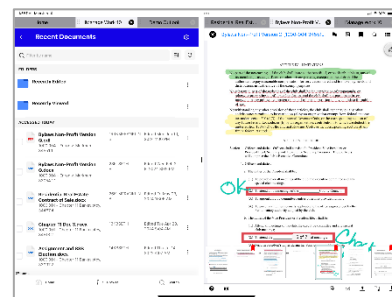


Two files are open on the right side.



Slide split screen handle all the way to the right.

Think of those two files as being off the screen to the right.



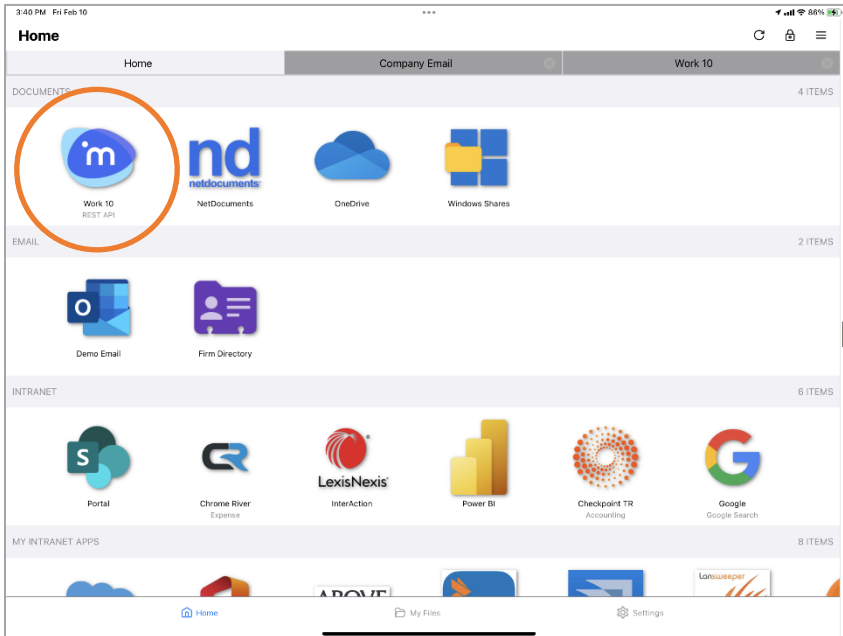
Slide handle back to mid-screen.

Now the two files reappear on the right.

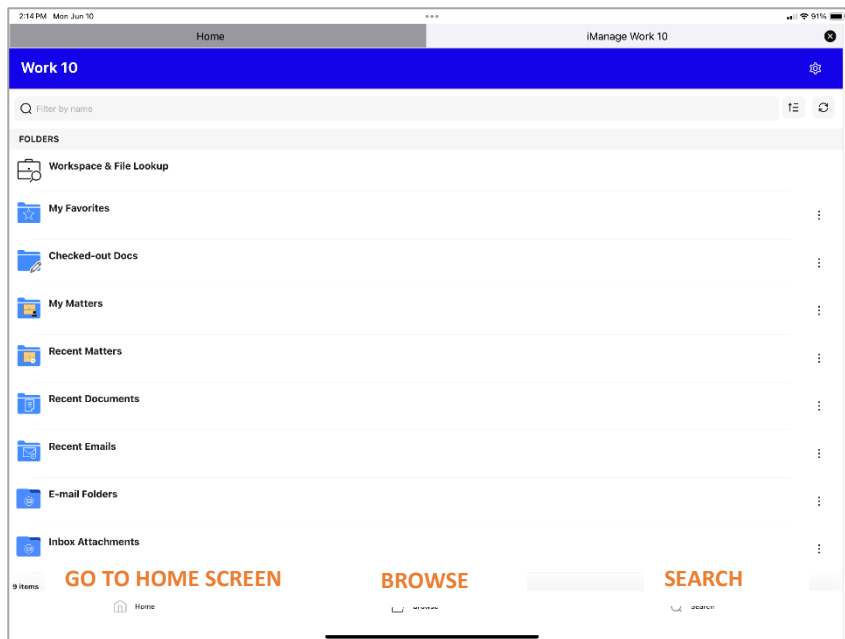
Also, since sliding to the left from the far-right clones the open tab on the left, there will be a new tab open on the right which is a clone of the open tab on the left.

Document Management

Find a File in DMS



Tap on the DMS tile.



Top Level Folders in DMS

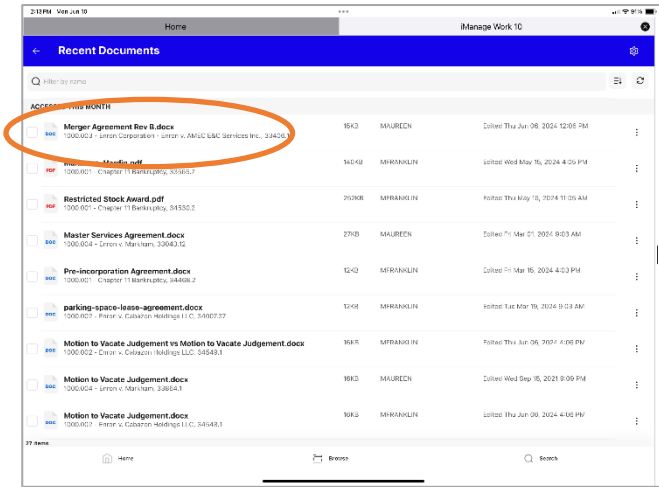
Three ways to find a file:

- I. Browse to any file by tapping on successive folders.
- II. Search – Tap Search Glass icon to go to Search.
- III. Use “Workspace & File Lookup” (more info below)

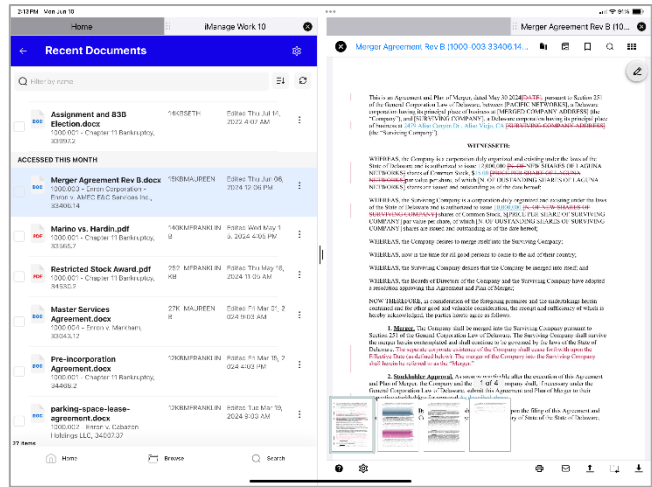
Unique Folders in LINK

- E-mail Folders: Attachments to emails in Outlook folders
- Inbox Attachments: Attachments to emails in the Outlook inbox

Open a File in DMS



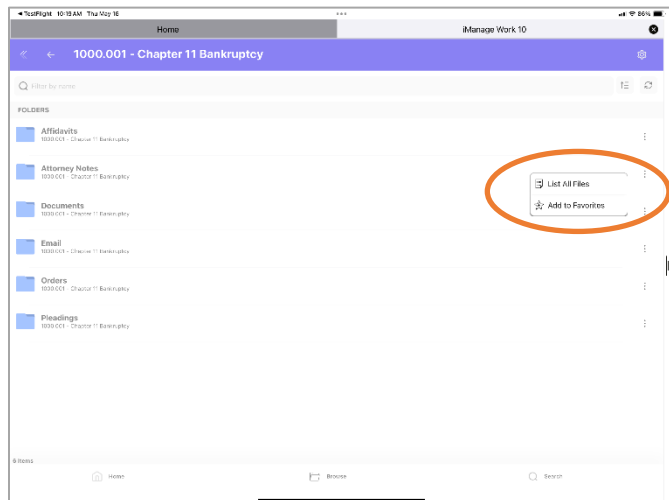
Tap on a file name to open the file.



File is displayed, including any redlines.

List All Files in a Workspace or Folder

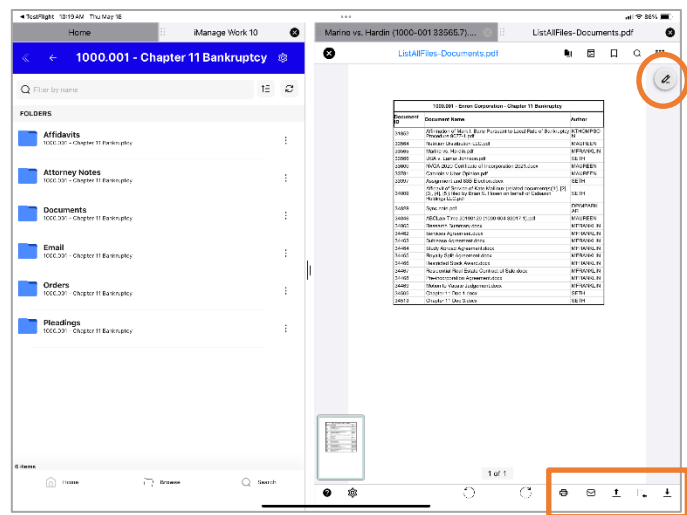
You can list all files in a Client/Matter Workspace or in any folder. You can also save the folder to your favorites for quick access. If you select “List All Files” you have the option to annotate the list, then Air Print, Email, Upload and to DMS, or Save to My Files (highlighted below). If you select “Add to Favorites” the folder will appear in the My Favorites folder on the main page of your DMS.



Tap the Ellipsis menu of the folder.

From the displayed list, tap the Pencil icon to annotate.

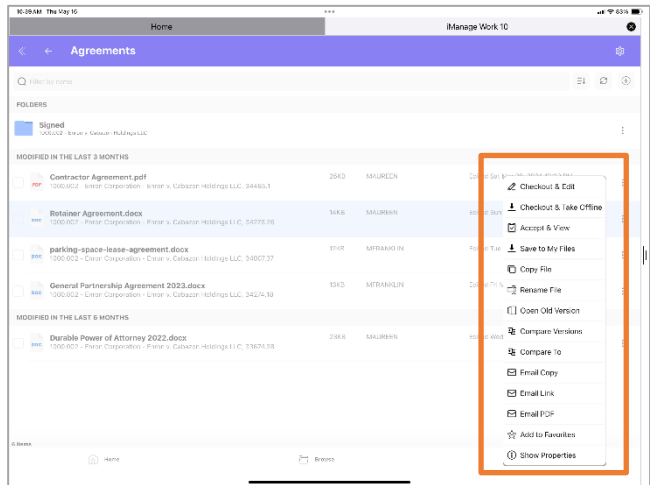
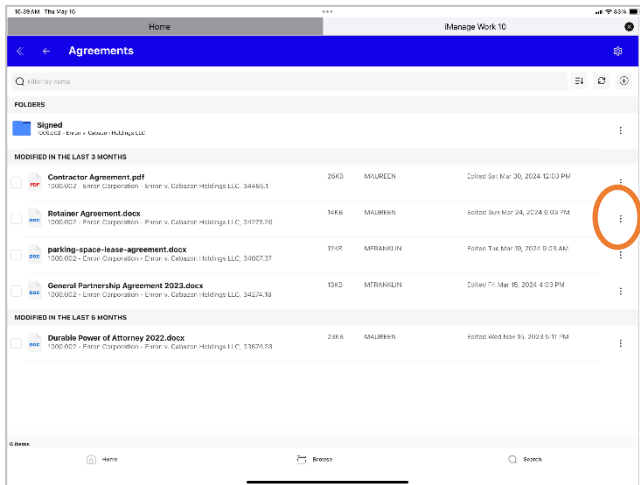
Tap “List All Files” or “Add to Favorites”



Then, tap the page to make the action icons appear below.

Or tap the X in the upper right for the actions menu.

Document Ellipsis Menu



Tap on the Ellipsis icon to display menu.

Document actions are displayed.

Options from the Ellipsis Menu – may vary per firm

- Checkout & Edit
- Checkout & Take Offline
- Accept & View (as a clean copy)
- Save to My Files (encrypted storage in LINK)
- Copy File
- Rename File
- Open Old Version
- Compare Versions
- Compare To
- Email Copy
- Email Link
- Email PDF
- Add to Favorites
- Show Properties
- Optional feature: Open in Another App – With this law-firm configurable option you can open a file in a 3rd-party app outside of LINK. The firm IT/Security department must review security ramifications before enabling this option in the LINK Controller. For help write to: support@mobilehelix.com

Folder Page Icon Legend

The screenshot shows the 'Documents' folder page. Callout boxes point to the following icons and their functions:

- Filter by file name:** Type in a few letters (points to the search icon).
- Settings:** Font size, open files in Split Screen Mode, more (points to the gear icon).
- Create and add to this folder at new Note, Photo, more:** (points to the plus icon).
- Refresh page:** (points to the circular arrow icon).
- Sort by Last Modified, Name, Type, etc.:** (points to the list view icon).
- Back to previous screen:** (points to the left arrow icon).
- Go to top folder level in DMS:** (points to the home icon).

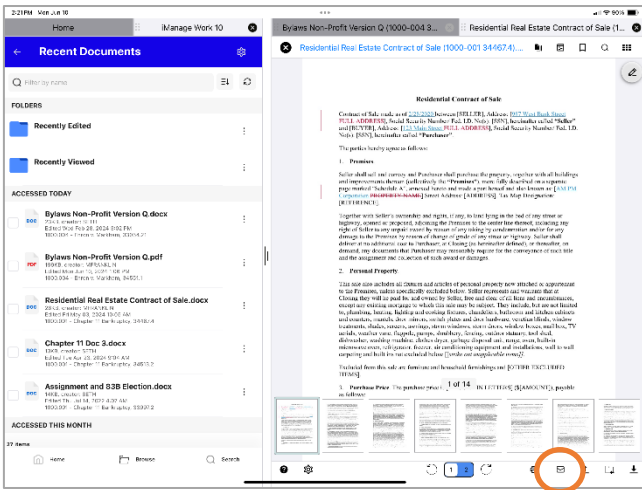
The screenshot shows the 'Agreements' folder page. Callout boxes highlight the following features:

- Multiple File Actions:** A callout box circles the 'Clear', 'Compare', 'Email', 'Download', and 'Open' icons at the top of the list.
- File Selection:** A callout box circles the radio buttons on the left side of the file list, used for selecting multiple files for actions.

Multiple File Actions

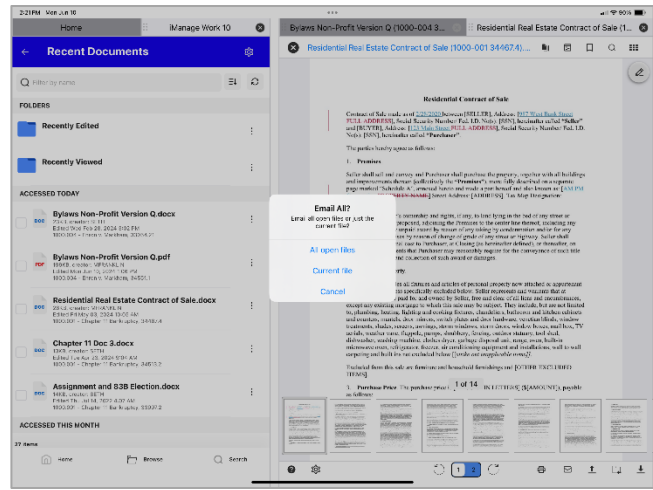
1. Check two or more radio buttons on the left.
2. Choose an action:
 - a. Compare two files
 - b. Email all
 - c. Download all to My Files encrypted storage in LINK
 - d. Open – open all marked files multi-tabbed view on a tablet

Email a File from the Document Viewer



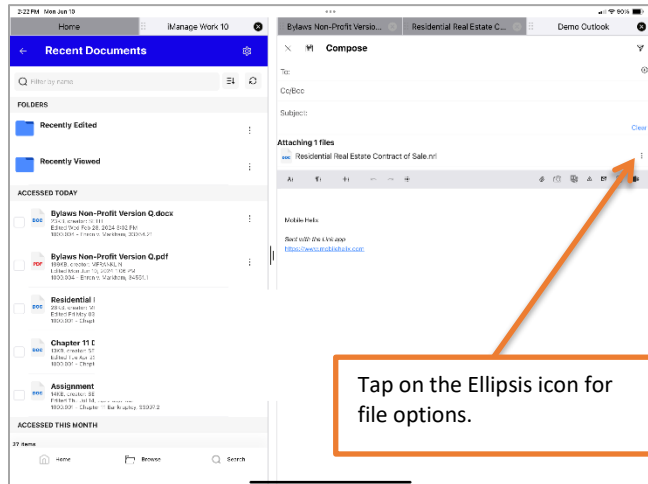
View the open document.

Tap the Envelope icon.

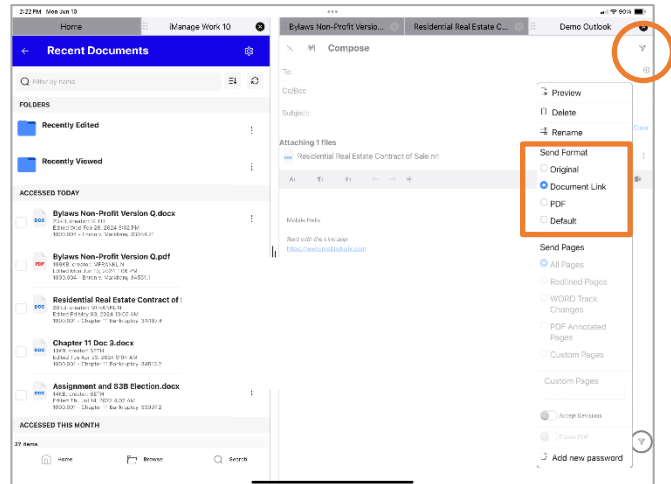


Select "All open files" or "Current file."

Next, select "This page" or "Full document."



Tap on the Ellipsis icon for file options.



To view file options, tap on the Ellipsis menu.

You may Preview, Delete, Rename, more.

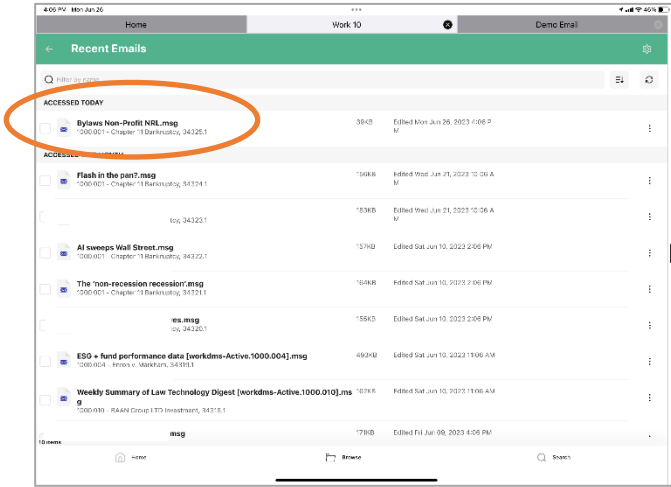
You may select to send the attachment as: "Original" (e.g., .docx), "Document Link" (.url) or PDF.

Finish composing the email.

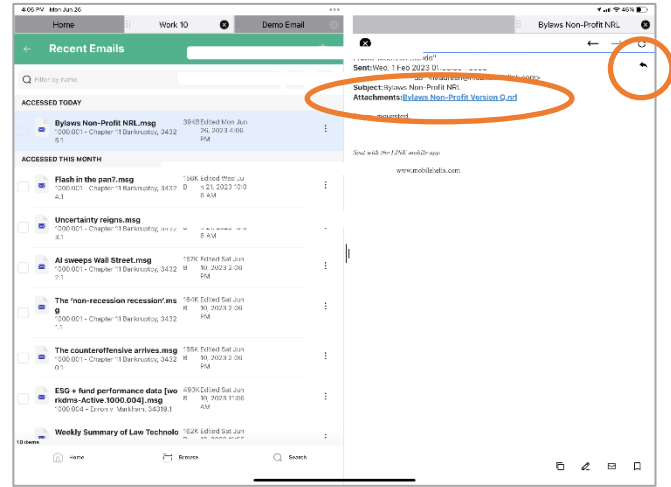
Tap the Paper Airplane icon to send.

Reference: [Compose & Send an Email.](#)

.MSG Files in DMS



To open a .MSG file, tap on it.

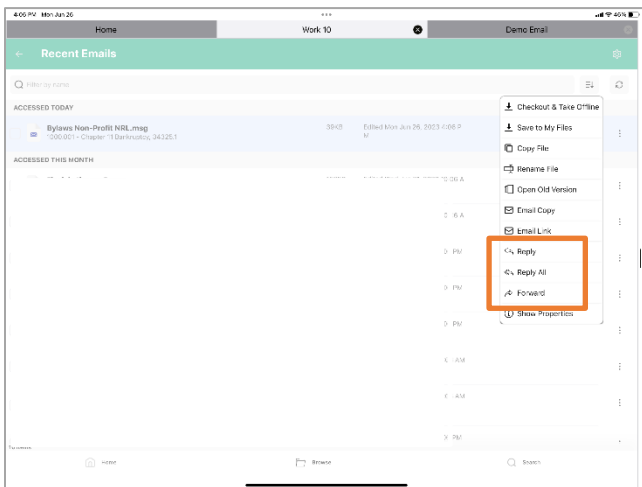


If the original email had an attachment, the .MSG file will also have a document embedded.

Tap on the blue hyperlink to view the attachment.

Use arrow to Reply, Reply All, or Forward

Reply, Reply All, & Forward an .MSG from the Ellipsis Menu

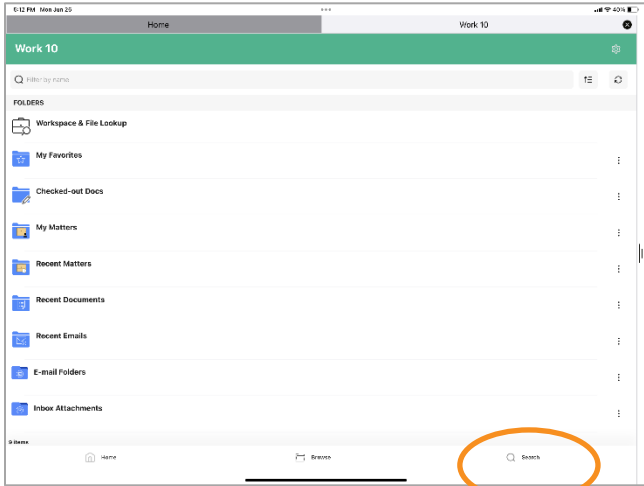


To Reply, Reply All, or Forward a .MSG file:

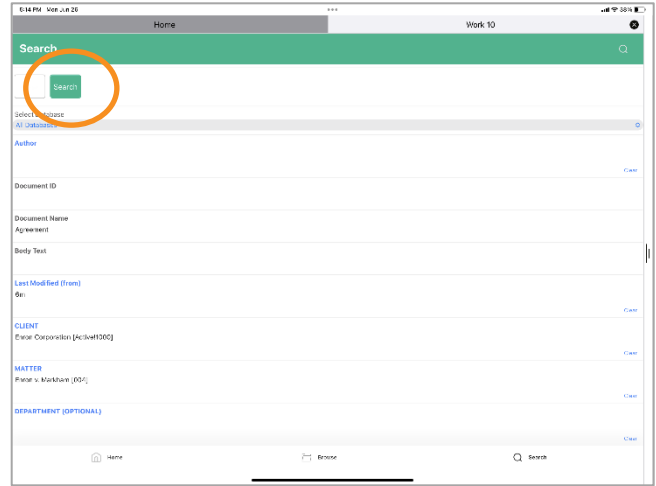
1. From the open .msg file use the arrow icons (upper right).
2. From the Folder (list) view, tap on the Ellipsis menu and select the desired option.

Search for a Document in DMS

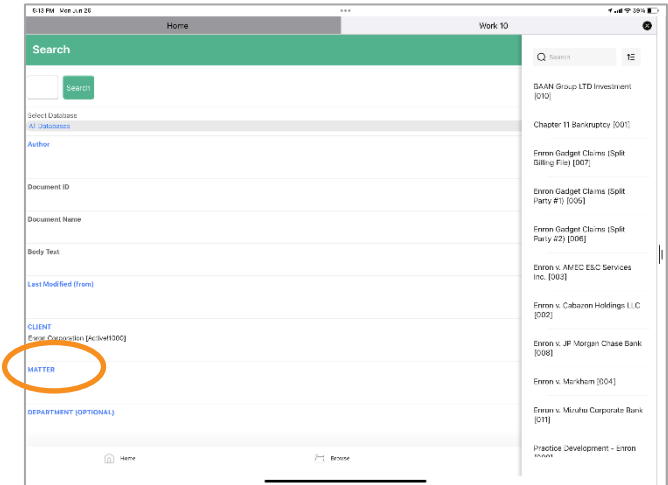
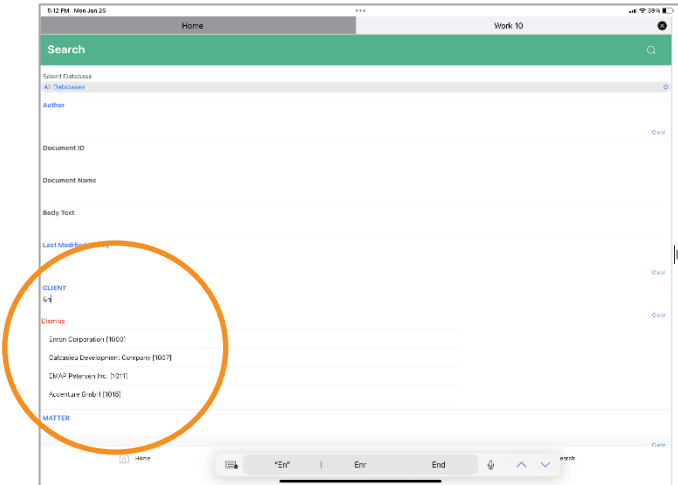
LINK uses the DMS search APIs. Therefore, you will get the same search engine as you have in DMS on your PC.



Tap on the Search Glass icon.



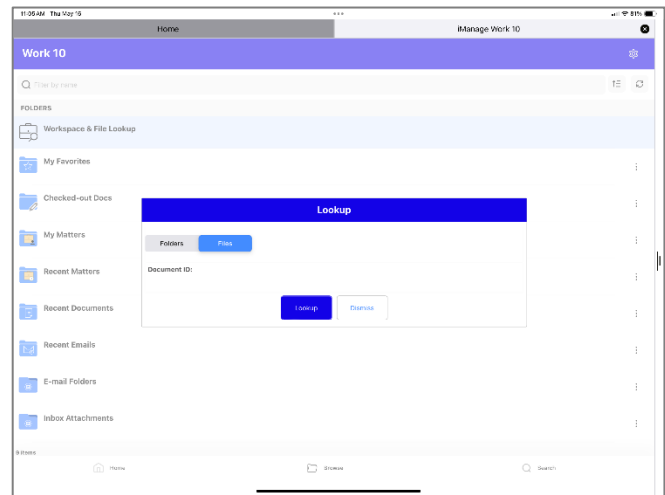
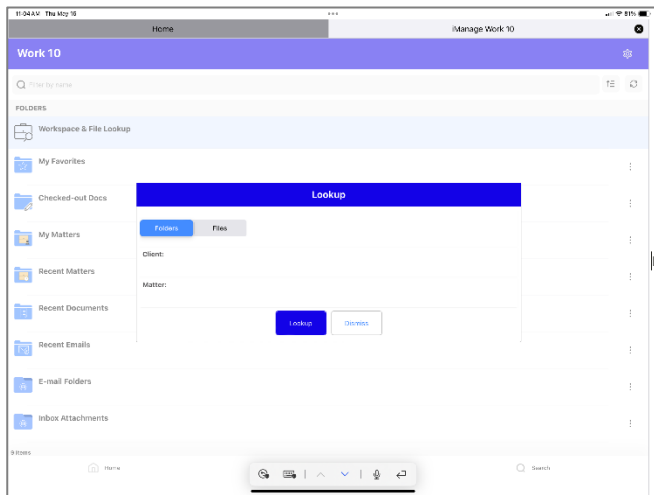
Enter your search criteria, then tap “Run Search” or Enter.



SEARCH TIPS:

- Where there is a field in blue font, you have two choices:
 - Type a few letters in the field, here “En” in “Client.” Options will be displayed in a drop-down menu.
 - Tap on the blue lettering, here “Client.” A list will be displayed on the right.
- Recent Searches – Your recent searches are saved. Tap “Recent” to display a list of Recent searches.
- Quick Lookup – You can also use [Lookup](#) from the DMS Folder screen to go directly to a Client/Matter or to a Doc ID.

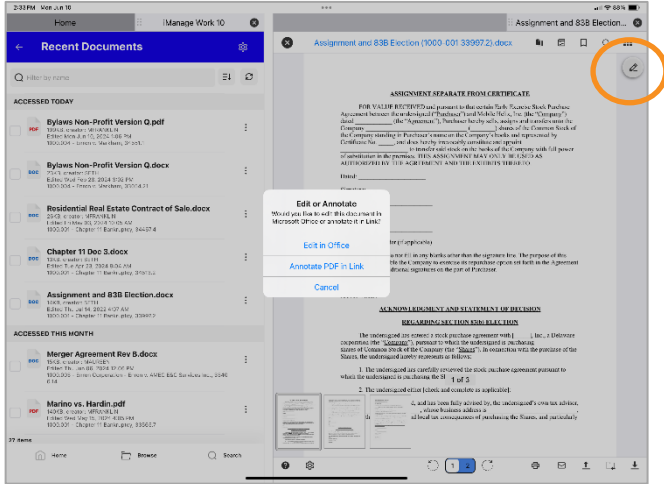
Workspace & File Lookup in DMS



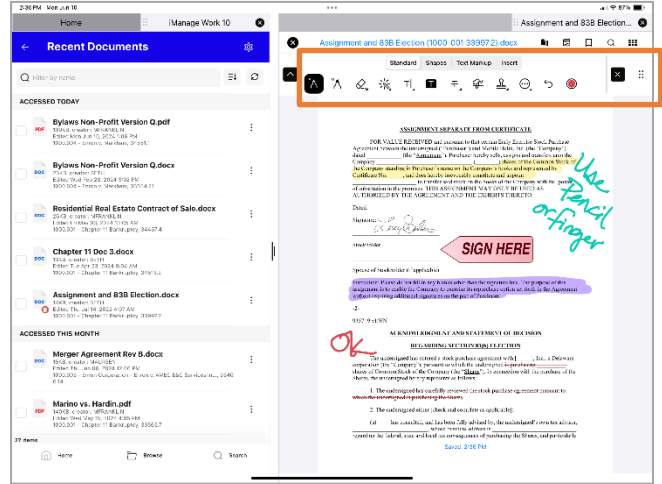
Quick lookup for:

- Client/Matter: Type a few letters of Client and then Matter. Select from drop-down menu. Tap Lookup.
- File: Tap "Files," enter Doc ID. Tap Lookup.

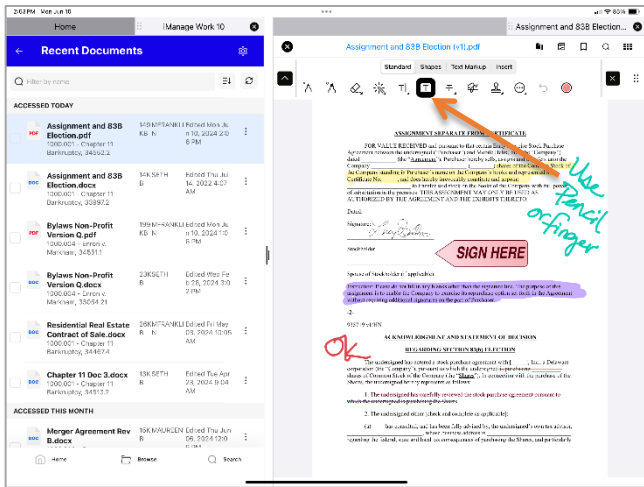
Annotate a Document



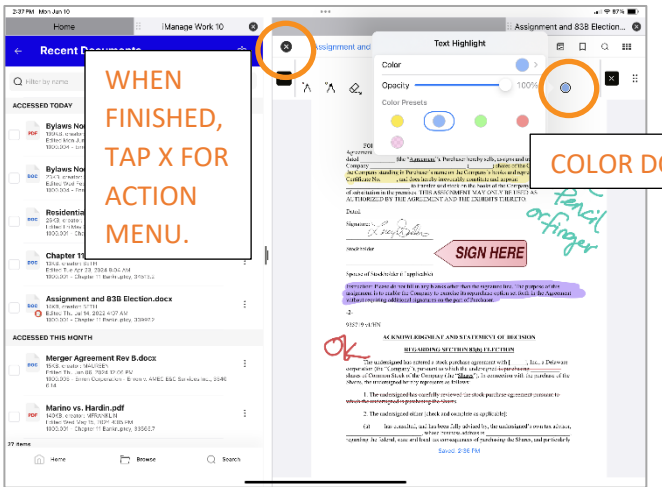
From an open document, tap the Pencil icon in the upper right. Select "Annotate PDF in Link."



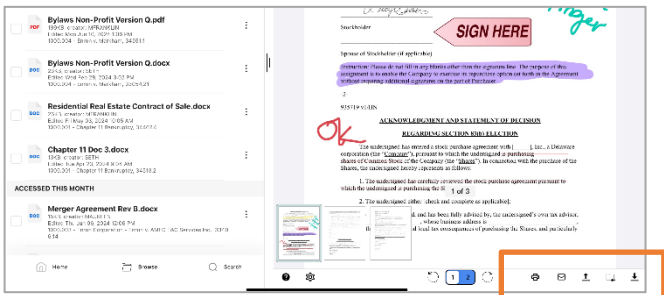
Annotation Toolbar is displayed across the top. Tap on a tool to use it. See [Annotation Toolbar Legend](#) below.



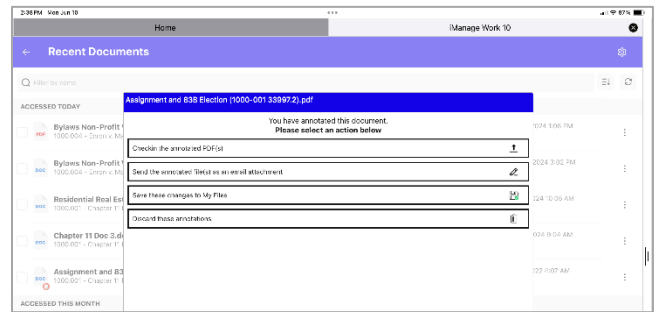
Select a tool. Here, the Text Highlighter.



Press on the color dot to change color, thickness, opacity.



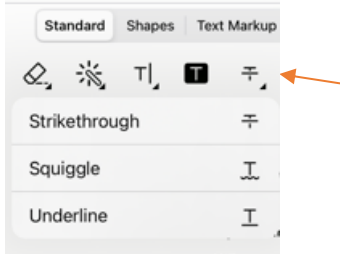
After annotation, select an action from the icons below: Air Print, Email, Upload to DMS, Save to a Folder in My Files, or Download/Save to My Files. Tap document to display icons.



Or, maybe easier, from the open, annotated file, tap the X in the upper left, beside the Gear, shown above. Action Menu is displayed.

Annotation Toolbar Legend

You may use the Apple Pencil or your finger to annotate in LINK.

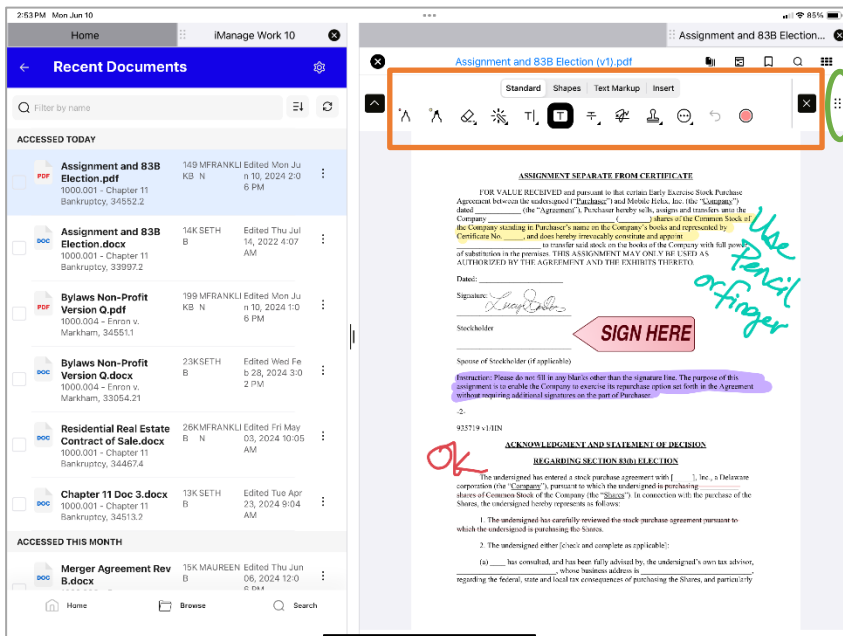


The small triangle at the lower right of a tool indicates that there are more related tools.

Press on the tool with the small triangle to see additional tools.

Here, press on the ≡ to display the Strikethrough, Squiggle, Underline tools.

To start the annotation: [From any open file in LINK, tap the Pencil icon.](#)



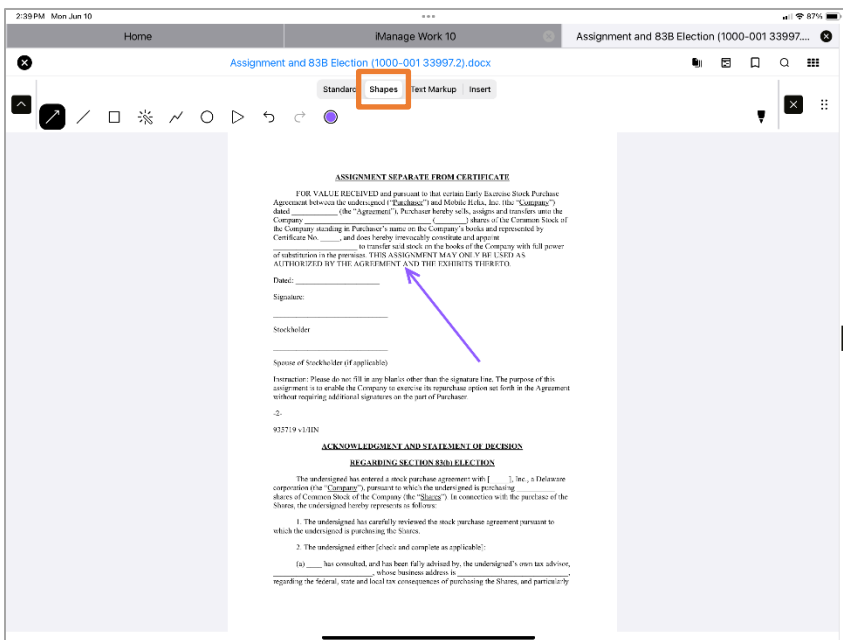
This is the Annotation Toolbar.

You can reposition it on the page, by pressing on the “handle” (in green) and positioning.

The Toolbar has tabs for additional tools: Standard, Shapes, Text Markup, and Insert (for signature and stamps/date)

Tool Icons in the Standard Tab (shown) include:

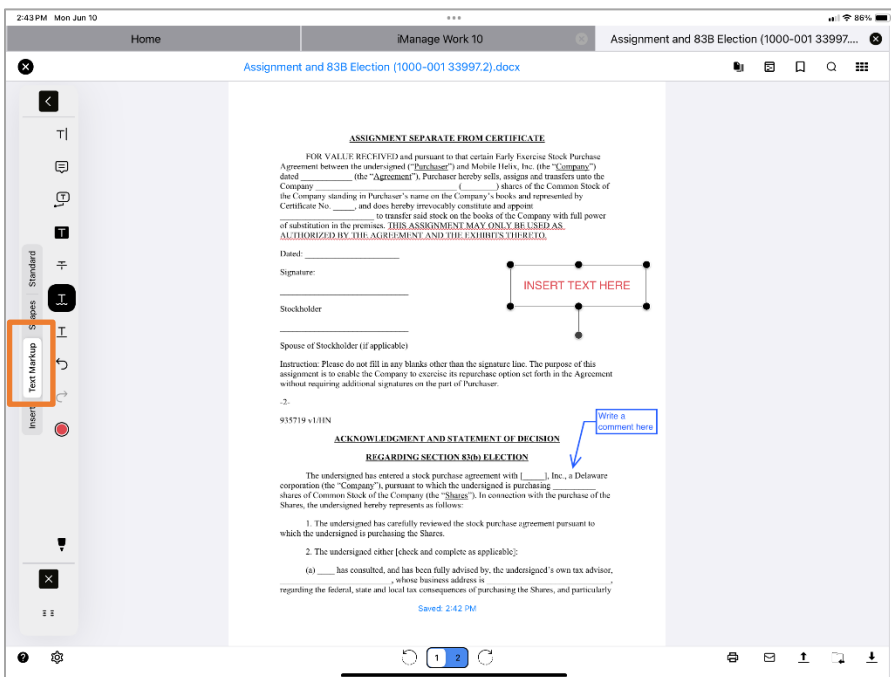
- Pen point: Write with Pencil or Finger
- Marker: Freehand highlighter
- Eraser
- Wand: draw a box
- “T|”: Add text; tap the T, tap the document, type text (or dictate)
- T: Text highlighter
- ≡ : Press on ≡ ; Underline, Squiggly Underline, Strikethrough
- Ellipsis in Circle: “More,” incl Undo and Redo, Signature (J), Stamps (date/time), Redaction
- Color dot: change feature color
- X in square: Close annotation menu



Shapes Tab

Includes:

- Arrow
- Wand – to draw a crisp rectangle
- Various shapes



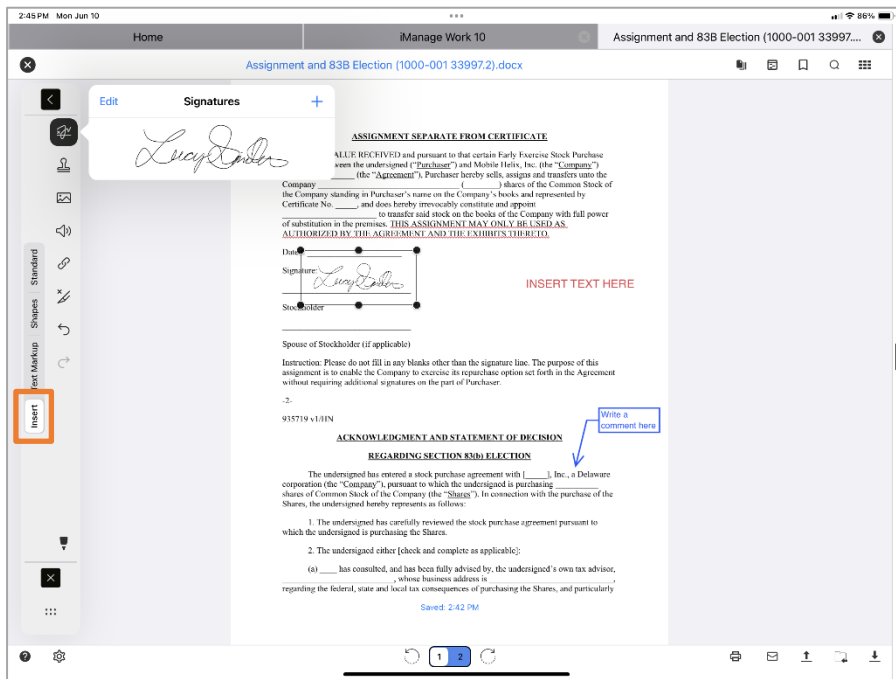
Text Markup Tab

Includes:

- Insert Text
- Comment

Note: As shown, you can move the annotation menu to another position, as preferred (left, right, or top).

Annotation (continued)



Insert Tab

Includes:

-Signature – Tap your signature, then tap the document and position.

To add your signature, tap the +, then sign, tap Save, tap Done.

-Stamps – Tap the Stamp icon.

Stamps includes time and date stamps. Tap the stamp, tap the document and position.

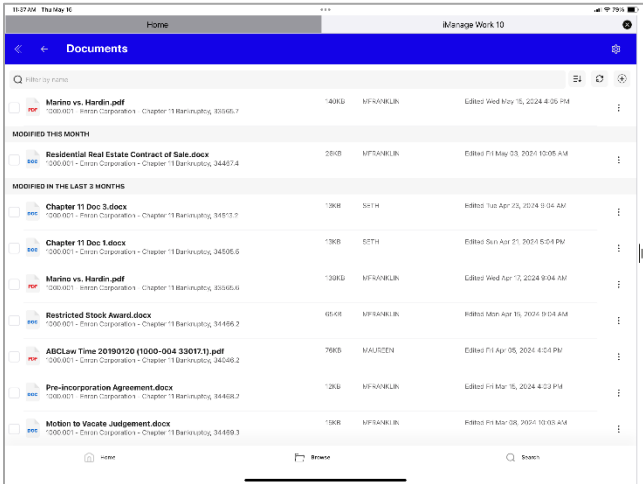
-Redaction Knife – See the how-to below.

For more information, see [Annotation Toolbar Legend for LINK Notes and Document Annotation](#) in the Document Center.

Linking an Annotated File (now a PDF) to the Original Word File

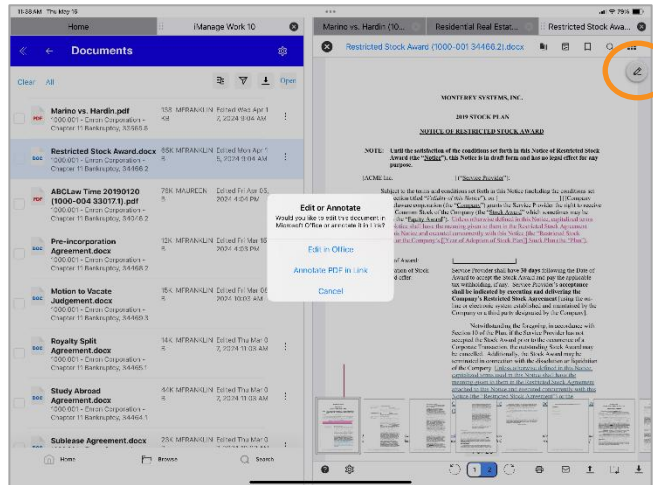
This workflow applies when you annotate a Word document and want to save it to DMS. An annotated Word file will now be a PDF and cannot be checked-in with the Word file Doc ID. It will be checked in as a PDF with a new Doc ID.

Note: If you go to the new PDF in iManage Work > Properties > Related Documents, the original Word file will be listed.



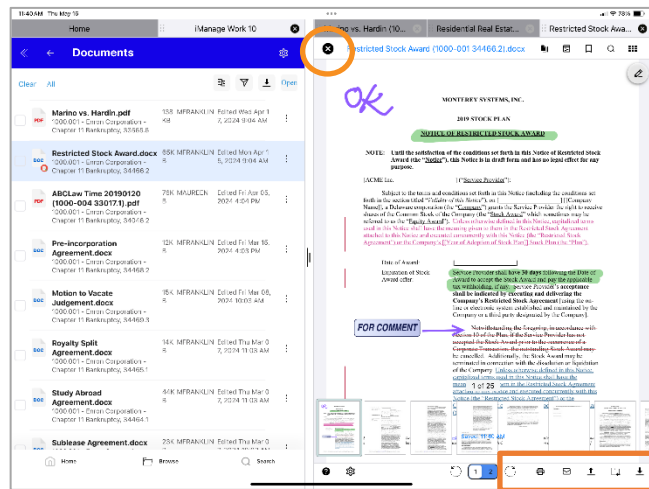
Select a document in DMS to annotate.

Tap to open the document.



Tap the Pencil icon.

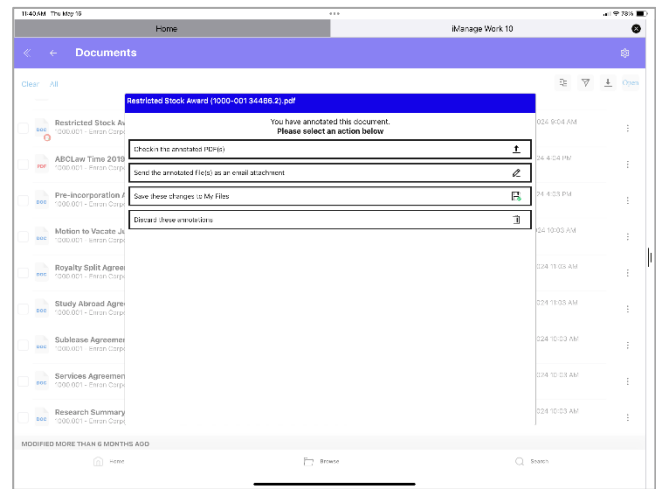
Select "Annotate PDF in Link."



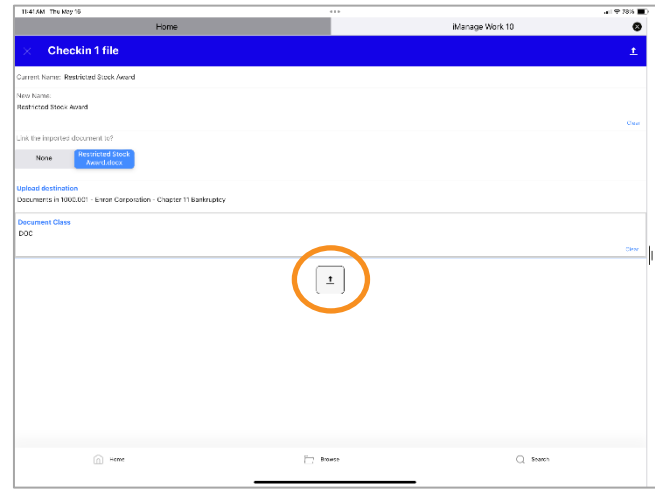
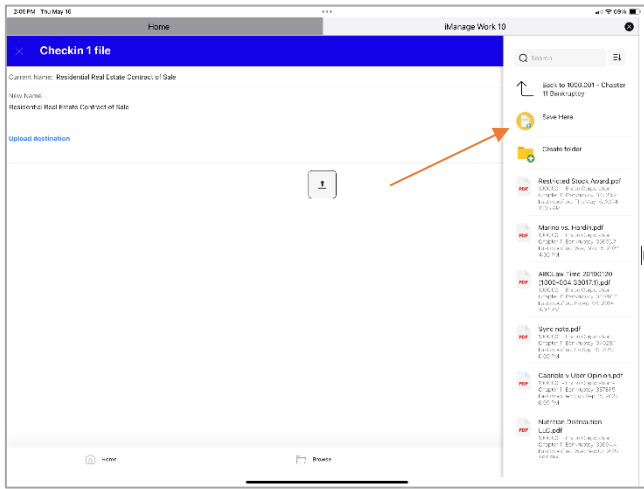
Annotate the document. See more on Annotation [HERE](#).

To import to DMS:

1. Tap the X in the upper left of the pane and use the Action Menu to check-in.
2. Or tap in the white space outside the document to display the action icons (Print, Email, etc.).



From the Action Menu, tap the first option, "Check-in Annotated PDF."



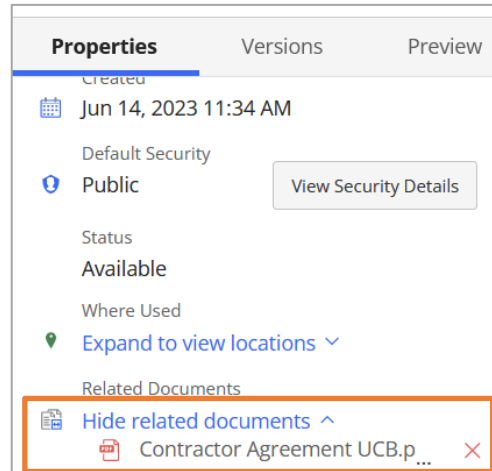
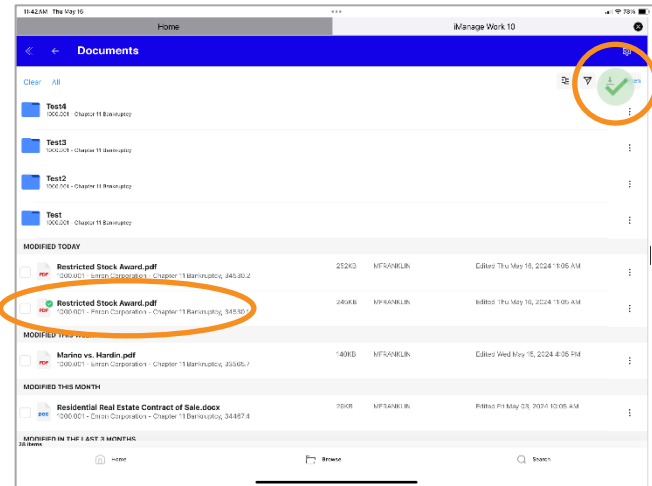
Here, you may modify the file name in “New Name.”

Change Document Class or Department by tapping on the blue text and selecting from menu.

Tap the Up Arrow icon to Check-in to DMS.

-Navigate to the destination folder.

-Tap “Save Here.”



The new file is checked in to DMS (green checkmark).

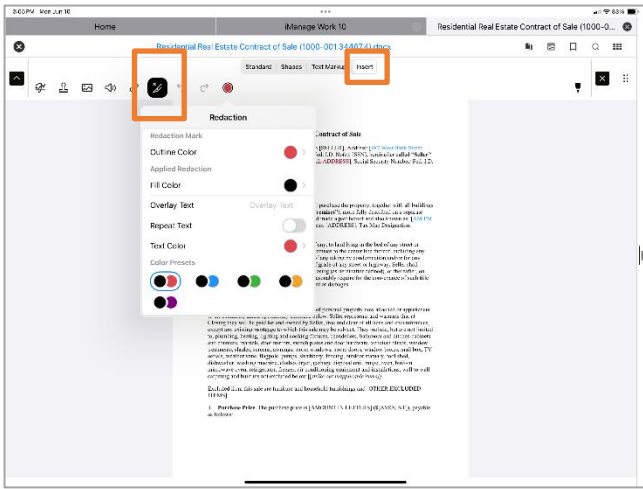
It is now a PDF.

It has a new Doc ID.

Related document in iManage Work

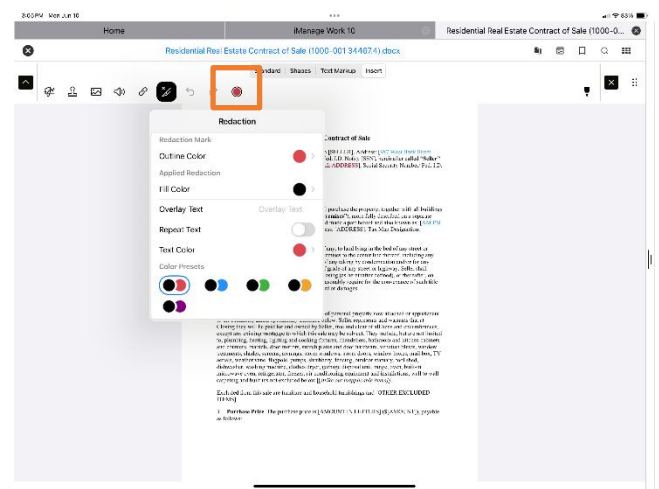
In Work, go to either version, the Word file or the Annotated PDF. You will find the other file referenced in Properties > Related Documents

How to Redact a Word or PDF File



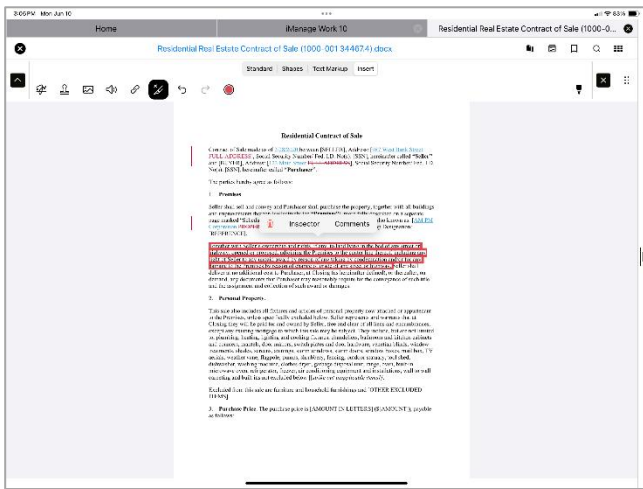
From the open doc, tap the Pencil icon to open the Annotation Toolbar.

Tap the “Insert” tab, then tap the Redaction Knife icon.



To change the colors used in Redaction, tap the color dot.

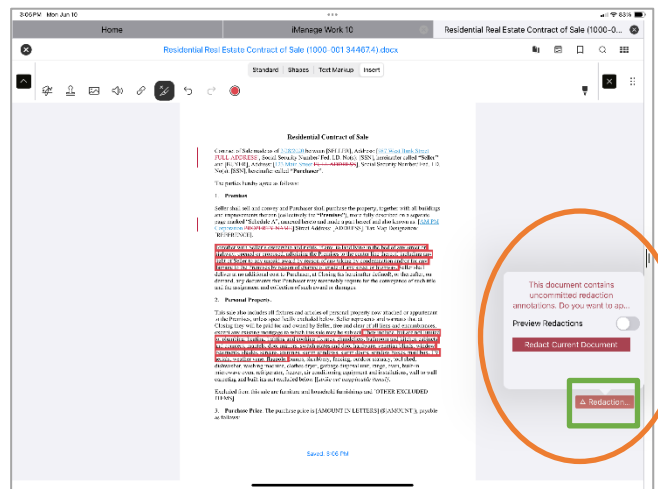
This shows that the Outline color (draft color) is red and the Fill Color (final redaction color) is black.



Make one or more redactions on the page.

If you want to change the redactions, tap on the redaction. From the local menu, tap the Trash Can.

Continue redacting.

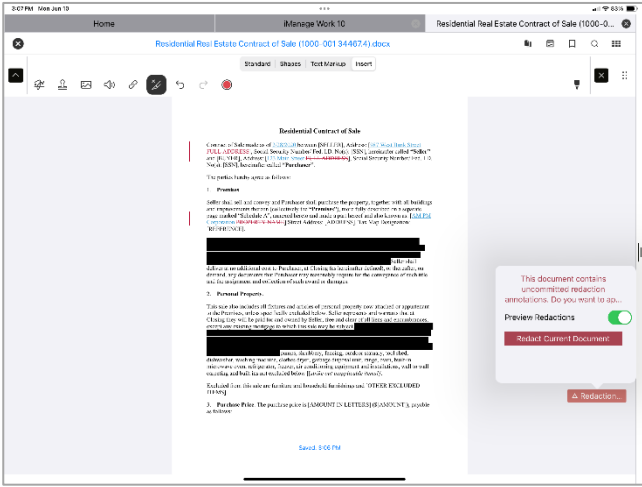


To preview the redactions (blacked out): Tap the Redaction button (highlighted in green). Then, toggle the “Preview Reactions” on.

If you want to change the redactions, toggle “Preview Redactions” off.

Then press on the redaction and tap the Trash Can.

Continue redacting.

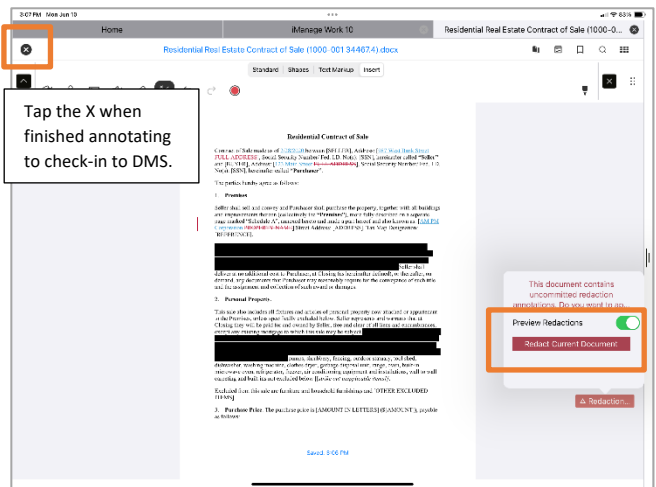


Here, the “Preview Redactions” toggle is on, therefore, redactions are blackened out.

If you want to change the redactions, toggle “Preview Redactions” off.

Then press on the redaction and tap the Trash Can.

Continue redacting.



When the redactions are as you would like them, tap “Redact Current Document.”

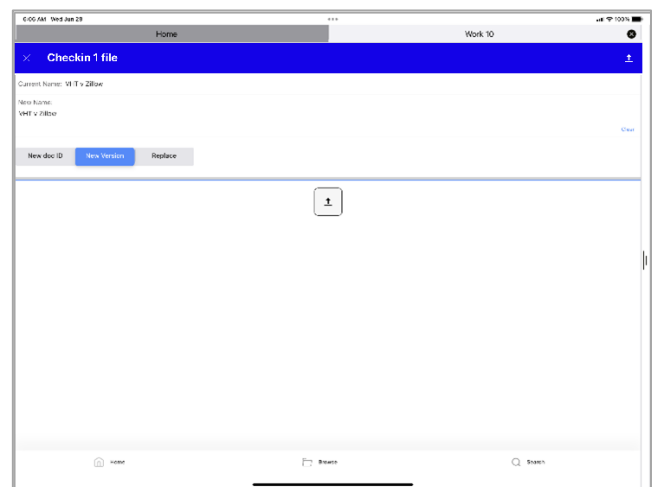
Note: To finally save the redactions to DMS, you must check-in the document.



-Check the redacted file into DMS.

-Tap the X in the upper left of the document. Illustrated in prior screen.

-Tap the first option, “Checkin the annotated PDF(s).”

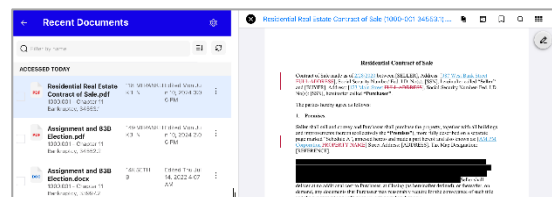


-Select Check-in option. Here selected is “New Version” which means same Doc ID with a New Version number.

- Tap the upload button.

- Now, go to your folder view and tap on the file to verify your redactions.

-You can find the file in the “Recent Documents” folder.

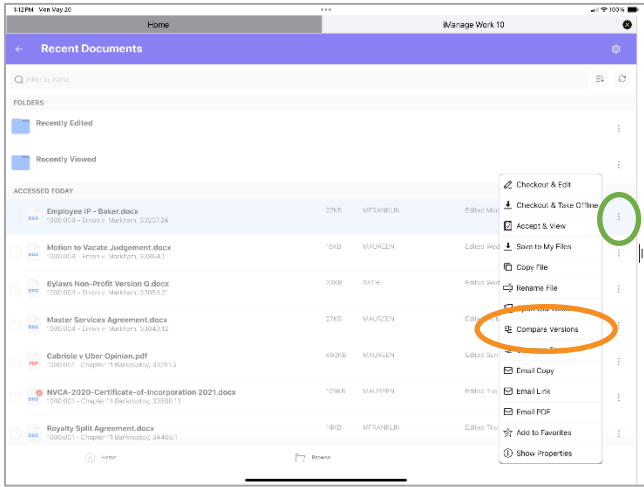


Compare Documents in LINK

LINK offers both “Tracked Changes” and “Inline text.” Select per each comparison.

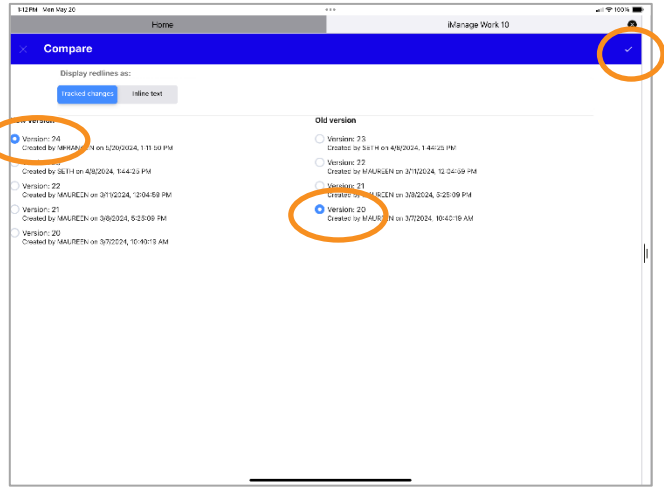
There are several ways to compare documents in LINK.

1. Compare two versions of the same document



Tap the Ellipsis menu on the right of the file name. (green highlight)

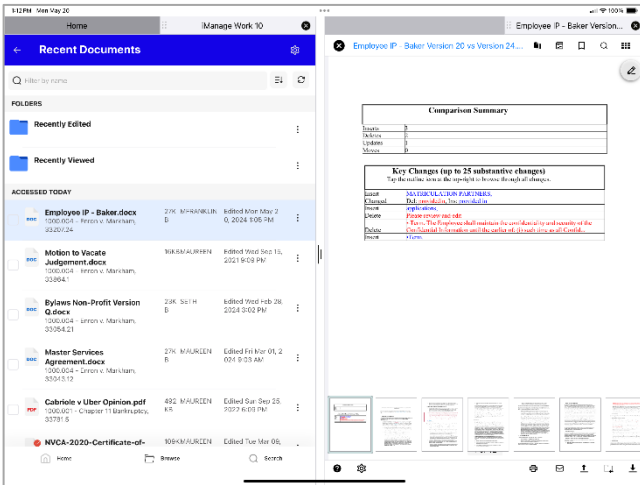
Tap “Compare Versions.” (orange highlight)



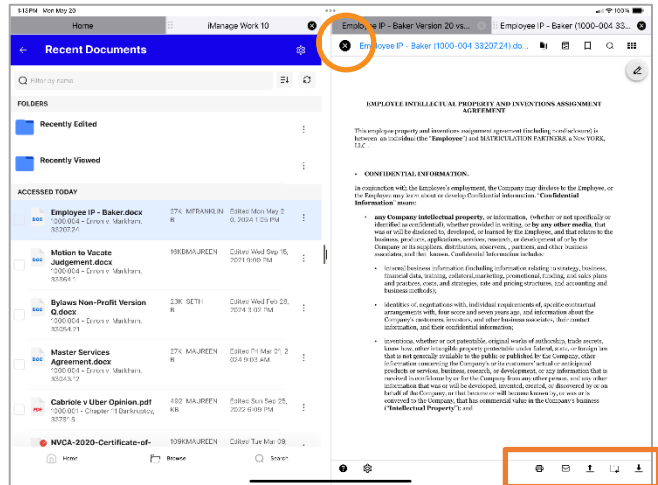
Select “Tracked changes” or Inline text.

Select the two versions to compare.

Tap the Checkmark to run the comparison.



A comparison summary page is presented on the first page, showing the top 25 changes.

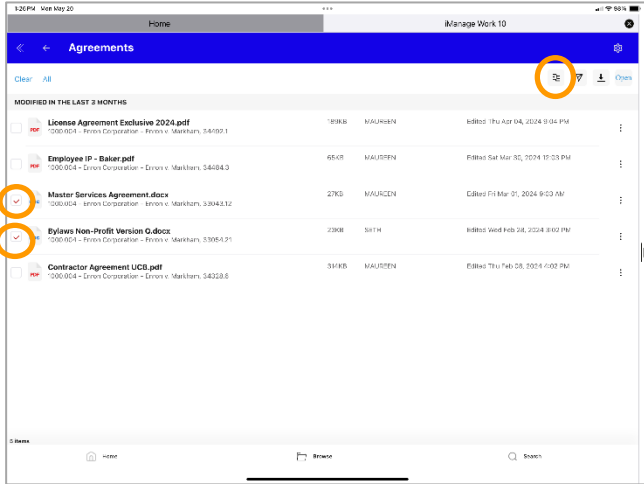


Comparison is displayed.

Take actions to Print, Email, save to DMS, file to a folder in My Files, or save to My Files, using the icons.

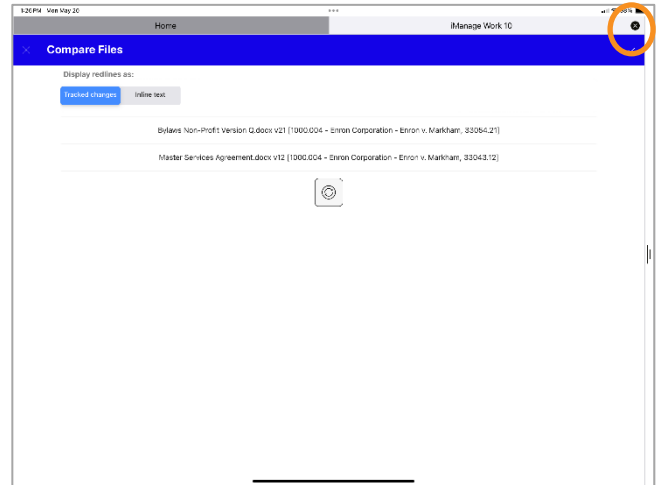
Tap the X in the upper left to close.

2. Compare two Word documents in the same folder



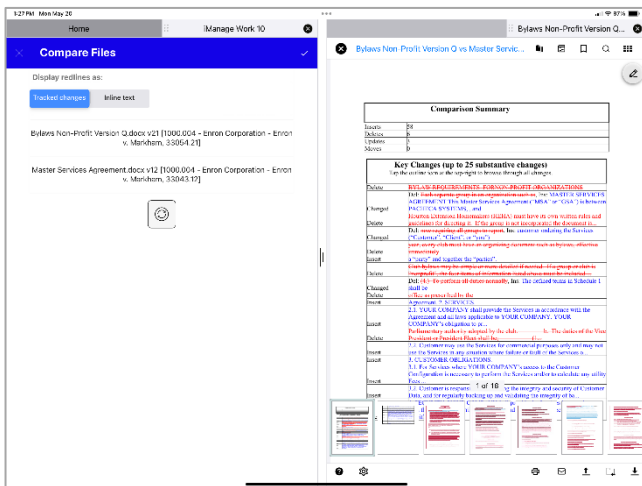
Tap the radio buttons to the left of the two documents.

Tap the Comparison icon in the upper right.



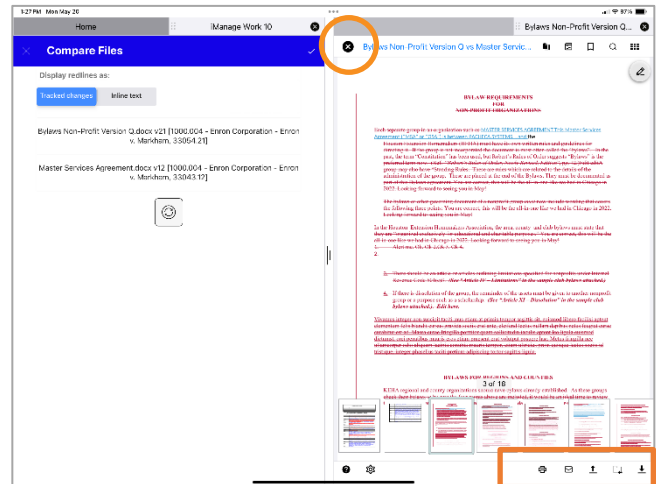
Tap the Checkmark to run the comparison.

To run a reverse comparison: Tap the Rotate icon.



The comparison summary is displayed.

The next page is the comparison.



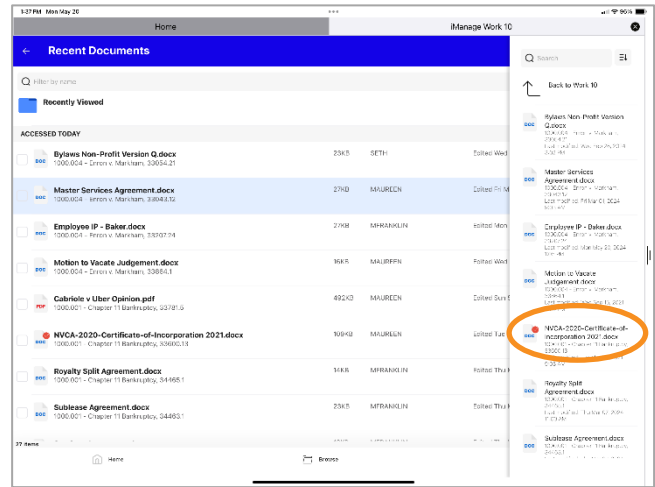
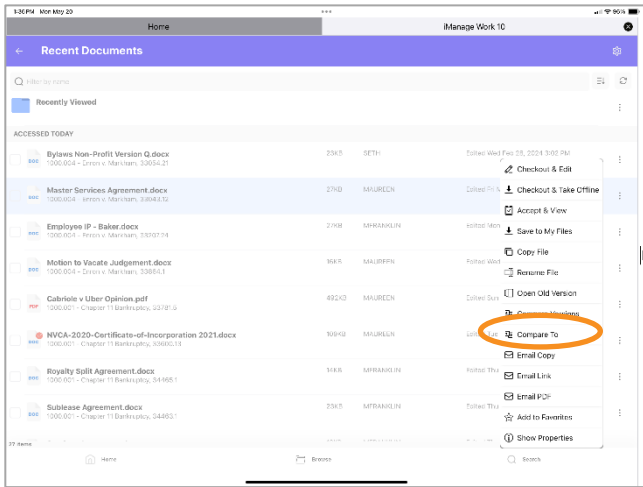
Comparison is displayed.

Take actions:

Use the icons in the lower right: Print, Email, save to DMS, file to a folder in My Files, or save to My Files, using the icons.

Tap the X in the upper left to close.

3. Compare any two Word documents in DMS

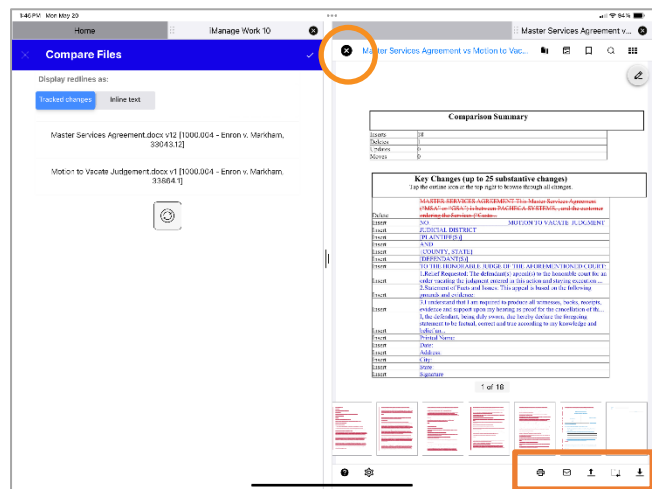
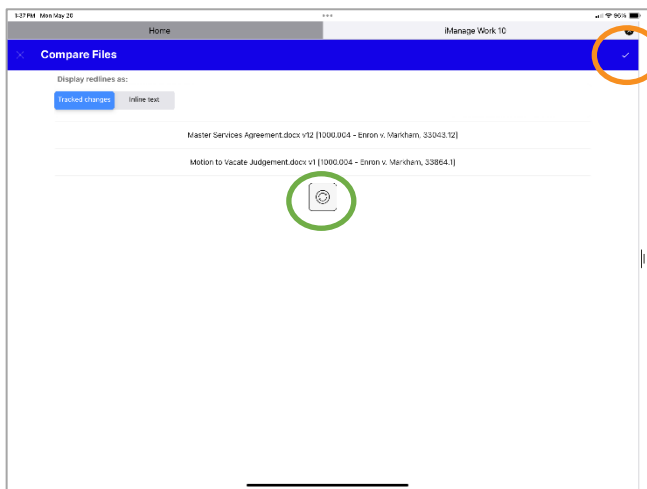


Tap the Ellipsis menu to the right.

Tap Compare To.

From the overlay, search or navigate to the second document. Tap that document.

Tap that document.



To run the comparison, tap the checkmark. (orange)

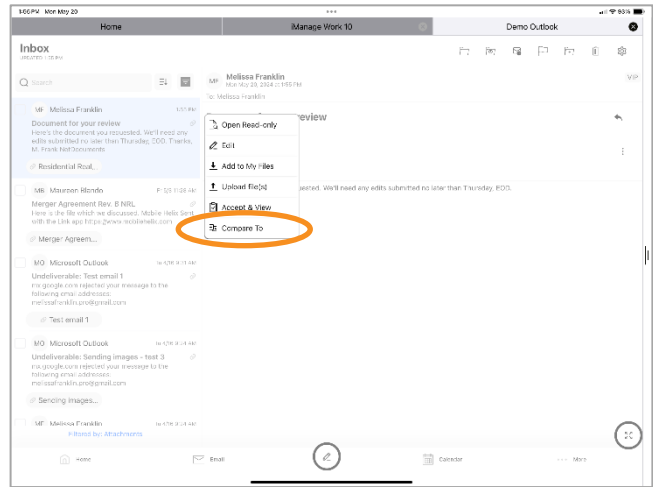
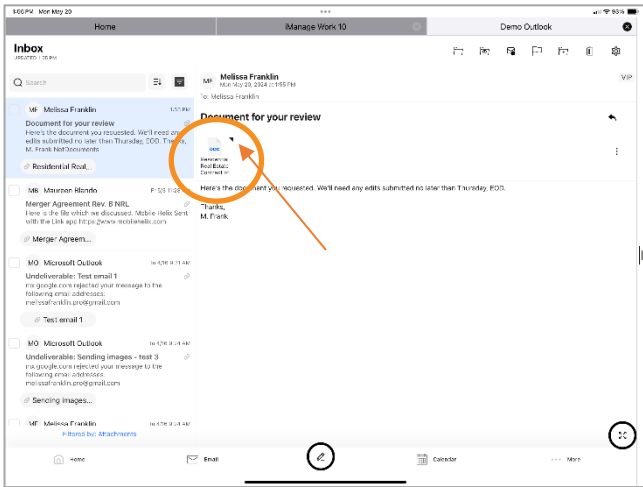
To run a reverse comparison, tap the rotating arrows. (green)

The comparison summary is displayed.

Take actions to Print, Email, save to DMS, file to a folder in My Files, or save to My Files, using the icons.

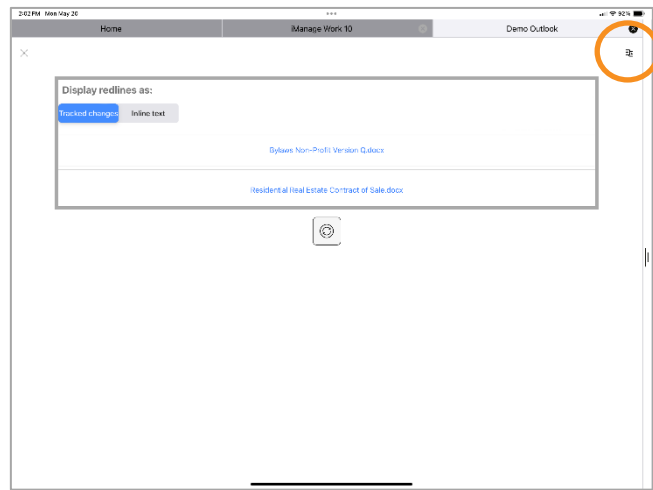
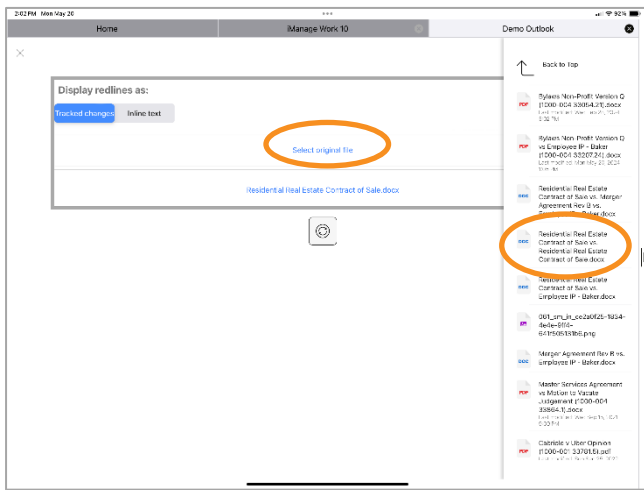
Tap the X in the upper left to close.

4. Compare an Email attachment to a document in DMS



Press on the small triangle for more options.

Tap "Compare To."



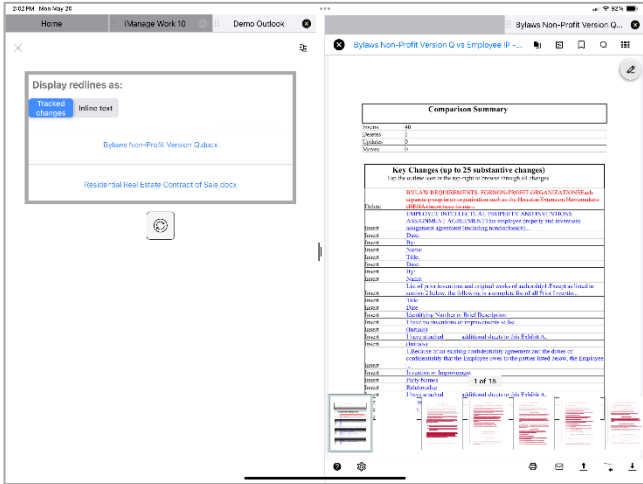
Tap "Select Original File."

Search or navigate to the target file.

Tap on the target file.

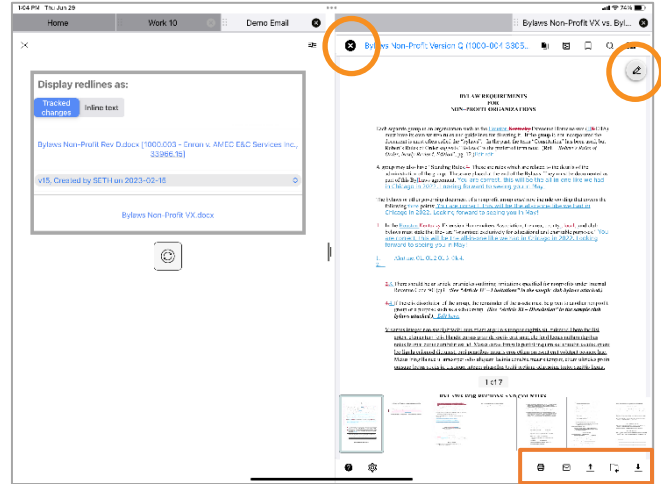
You can reverse the files by tapping the Rotate icon.

Tap the Compare icon to run the search.



The comparison summary is displayed.

The next page is the comparison.



The comparison is displayed.

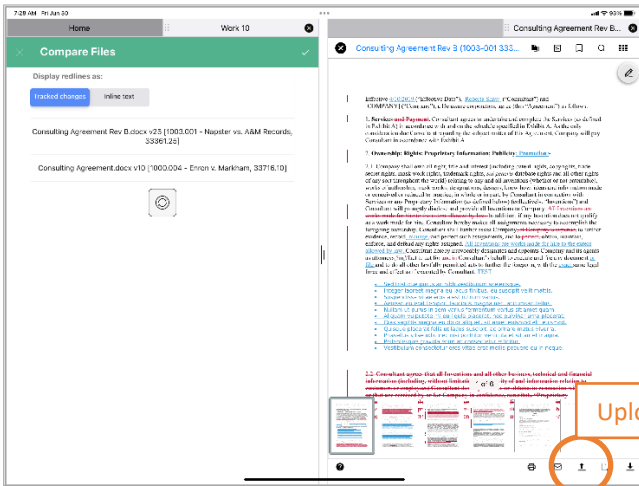
You may annotate by tapping the Pencil icon.

Take action:

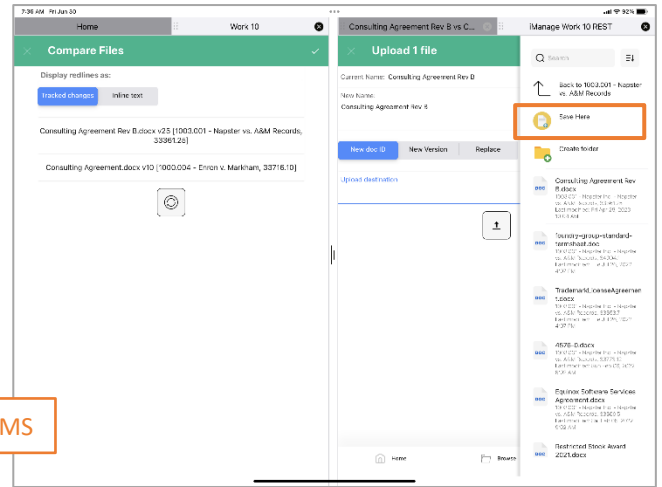
Use the icons in the lower right: Print, Email, save to DMS, file to a folder in My Files, or save to My Files, using the icons.

Tap the X in the upper left to close.

How to Check-in the Comparison Copy to DMS and LINK to the Original



Upload to DMS

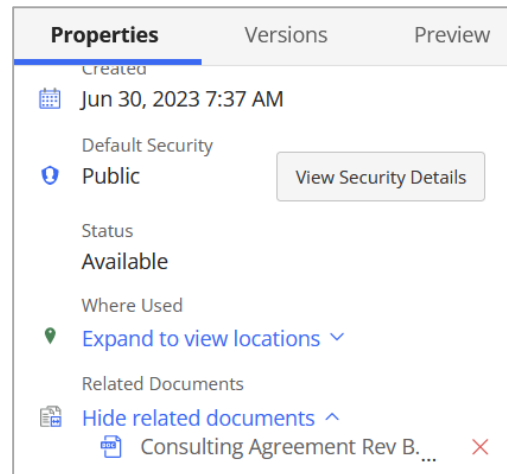
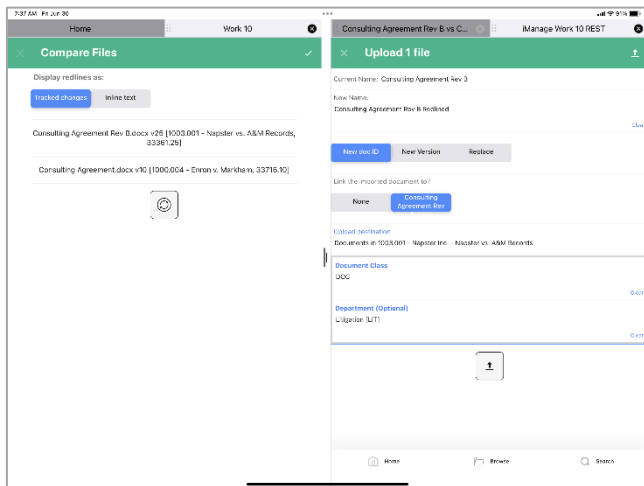


The redlined comparison of two versions is displayed.

To check the redlined comparison in to DMS, tap the Upload icon.

From the overlay on the right, navigate to the folder where you want to check-in the comparison version.

Tap “Save Here.”



On the Upload screen you may:

1. Recommended: Change New Name, e.g., append “Redlined,” as shown.
2. To link the Original Doc ID, select “New doc ID.”
3. Select “Link the imported document to.” This will display the Original document file name.
4. You may change the Class and Dept by tapping on the blue text and selecting new ones.
5. Tap the upload button.

Related Document in iManage Work

In iManage Work on your PC, go to the Comparison file, Doc ID (ex. 34329).

You will find the Original (33361) file referenced in:

Properties > Related Documents.

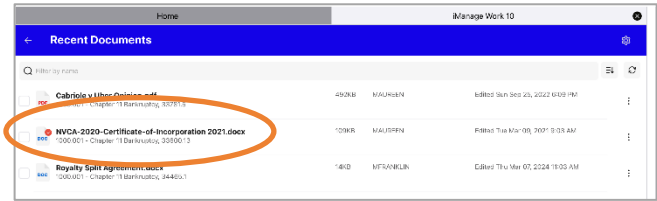
(You may also do the reverse, go to the Original (33361) and locate the Comparison file (34329) in Properties > Related Documents.

Key to a Checked-out File in DMS

If a file is checked-out to you, a green check mark will appear on the file icon.

If a file is checked-out to another person, a red check mark will appear on the file icon.

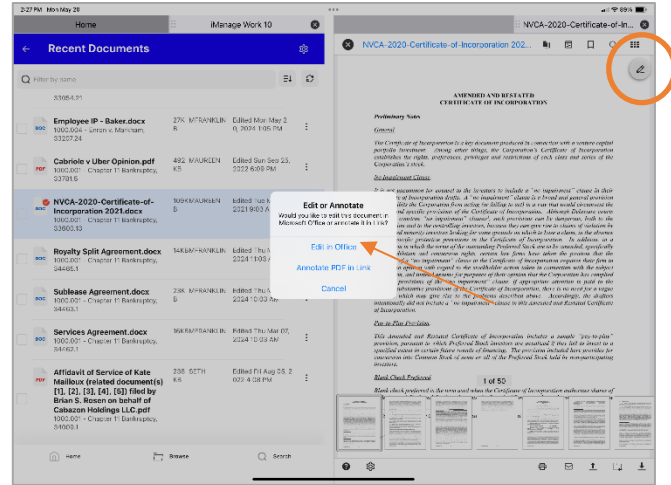
If you try to edit a file checked out to someone else, a warning will be displayed, see below.



Top: Green check – checked out to you.

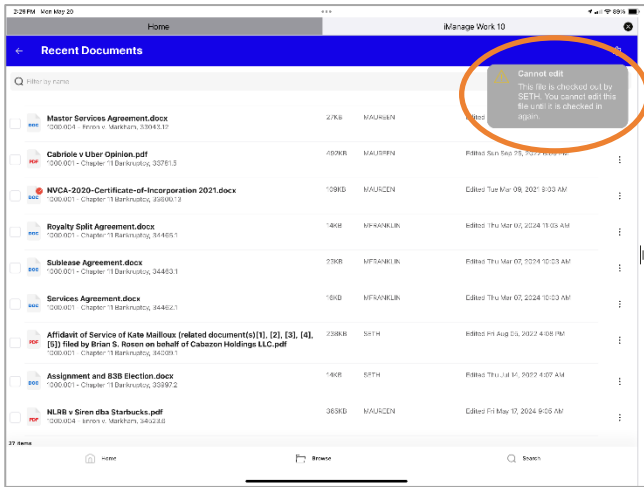
Bottom: Red check - checked out to someone else.

Tap File Name to open and edit.



From the open file, tap the Pencil icon.

Then, tap “Edit in Office.”

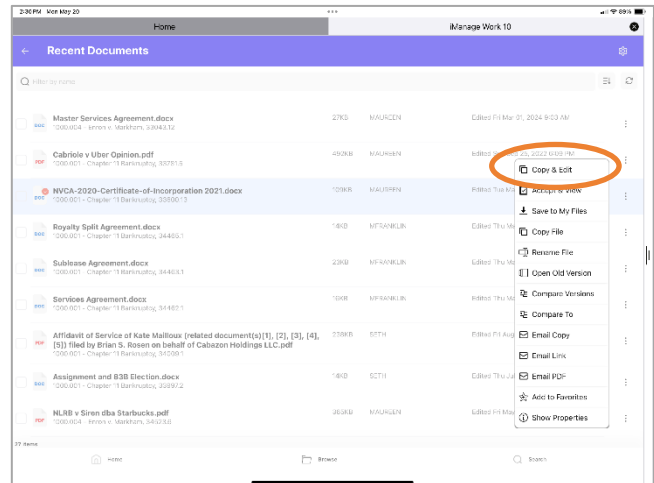


Warning message will appear:

“Cannot edit. This file is check out by <NAME>. You cannot edit this file until it is checked in again.”

Note: If you still want to edit a copy of this check-out file, go to the Ellipsis Menu to the right of the file name and select “Copy and Edit.”

You will check-in as new document with a new Doc ID. Then proceed to edit the new Doc ID.



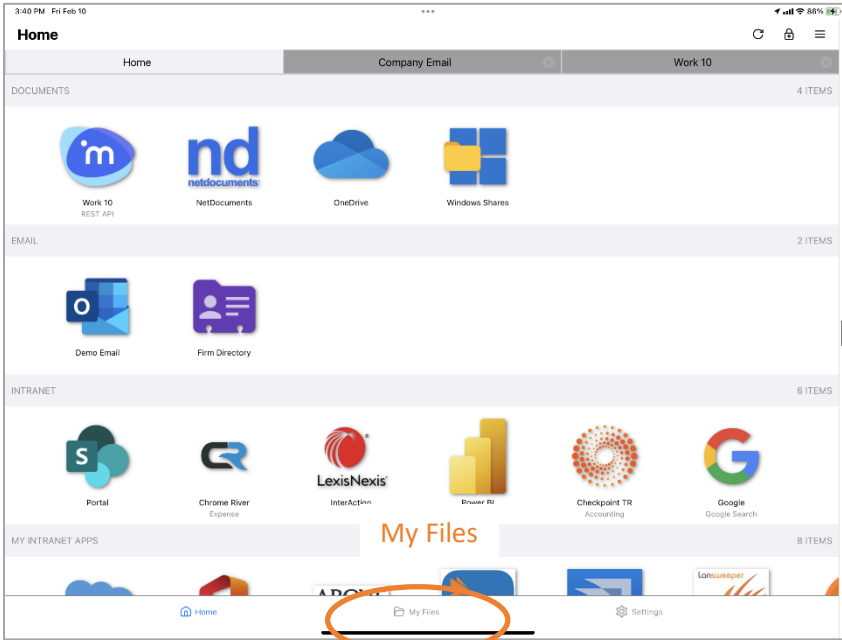
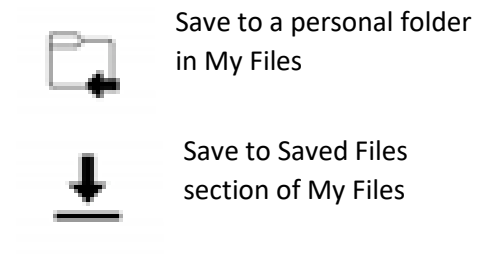
Note: LINK will not let you check-out a file which is already checked-out from the Ellipsis menu.

See above, there is no option for “Checkout & Edit” or ‘Checkout & Take Offline’ when there is a red check mark.

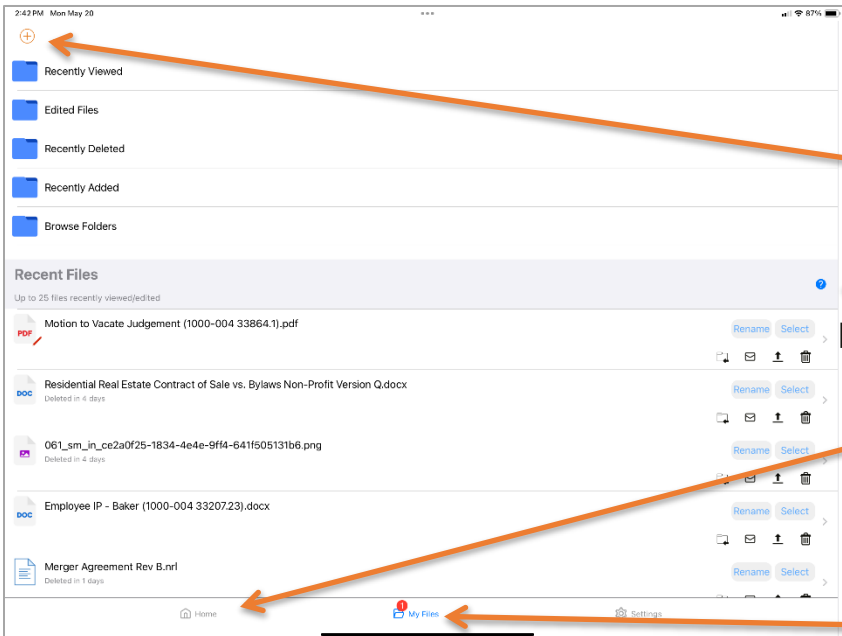
My Files

“My Files” is the local, encrypted location for documents. You may view files in My Files when on-line and off-line.

There are two My Files Action Icons in the lower right of any open file.



Tap My Files.



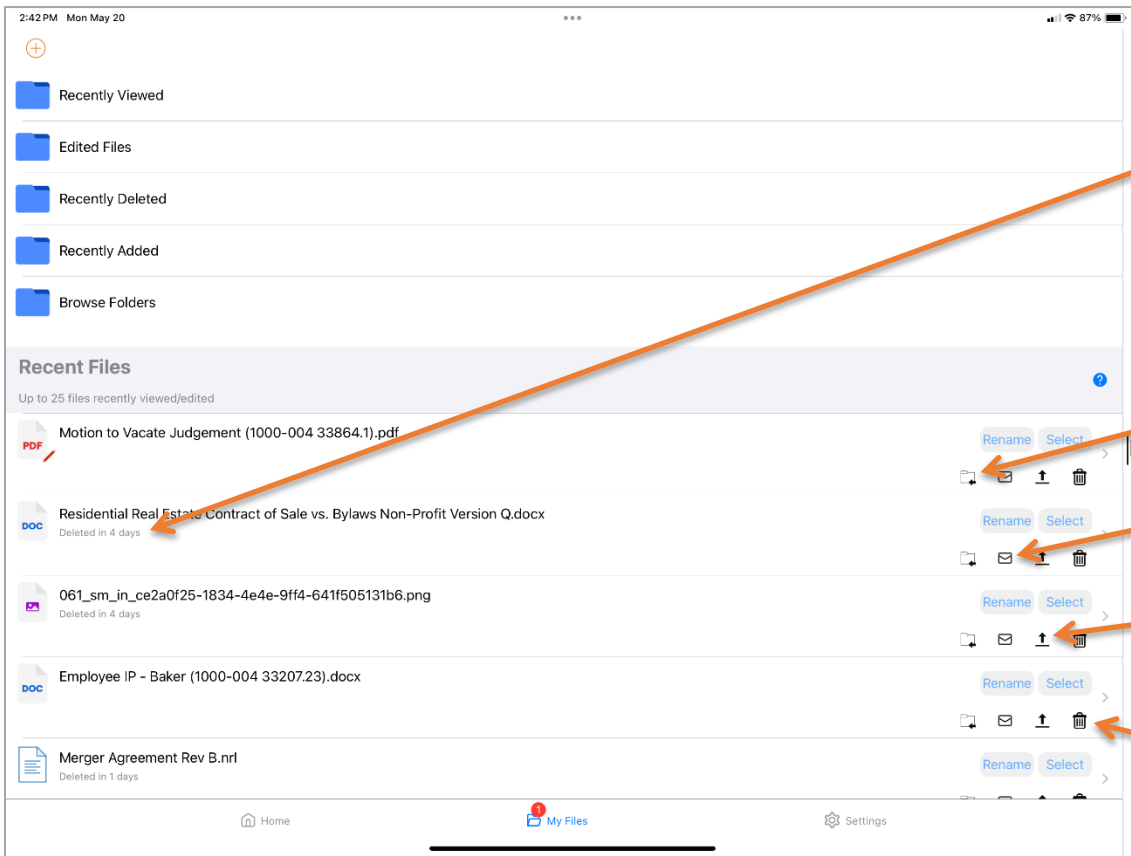
“+” mark – create new Audio, Video, Photo, or Note. Also, import External Document.

“?” Icon Legend Help

Go to LINK Home Screen

Counter of the number of files which have been edited or annotated but not checked-in yet. These files may be found in the “Recently Edited Folder.”

My Files Icon Legend



Days until doc will be expired from My Files

This is a firm IT policy. Every time a file is opened the expiration resets.

Organize in My Files - Tag document
Create a new tag/folder

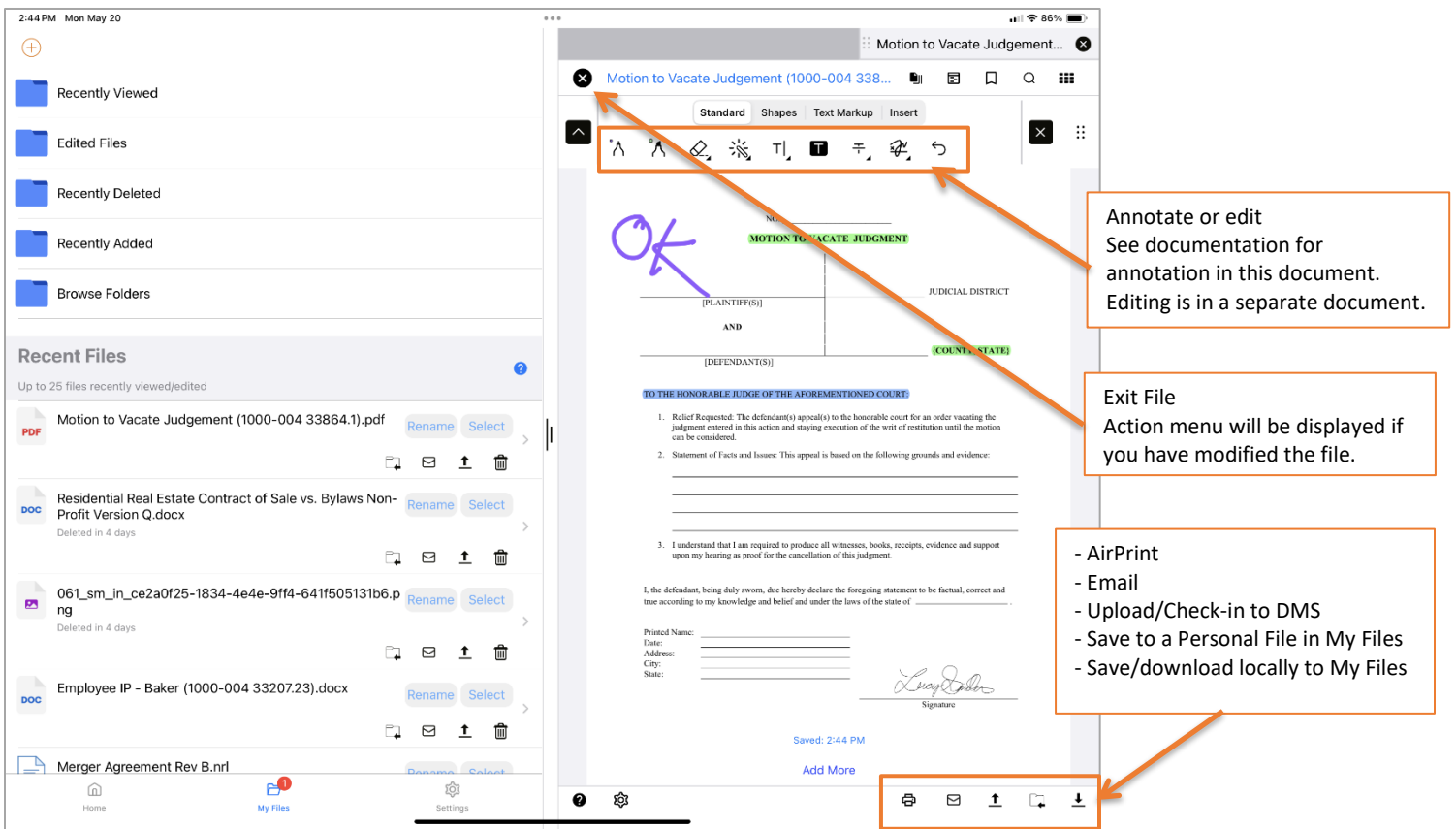
Email document

Upload Icon: Import or Check-in a Doc to DMS

Delete document from My Files

Files expiration is a policy set by IT. Opening or acting on a doc will reset the expiration window.

Tap the file name to view a document.



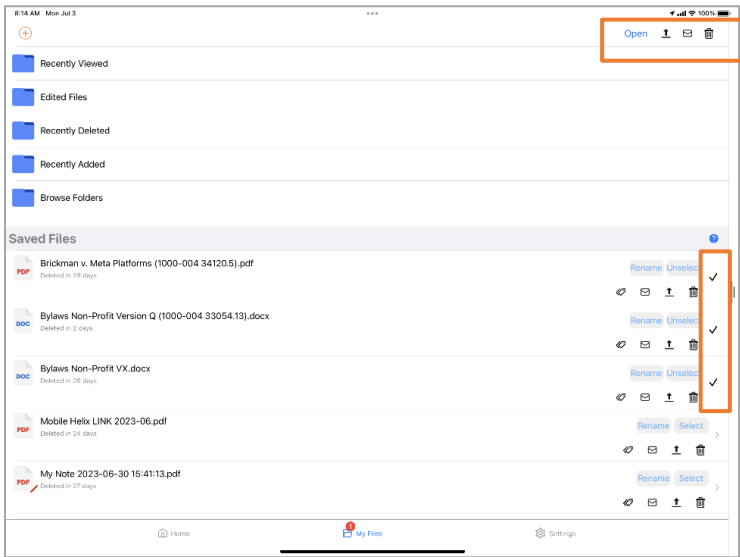
From the [Document View \(more information here\)](#) you may edit or annotate a file in My Files.

You can then perform any of the following actions:

1. AirPrint
2. Email
3. Import or check-in a document to DMS or another repository (rectangle with up arrow)
4. Save to a Personal File in My Files
5. Save locally to My Files

Or, tap the X to exit the file. The action menu will be displayed if the file has been modified.

Act on Multiple Files in My Files

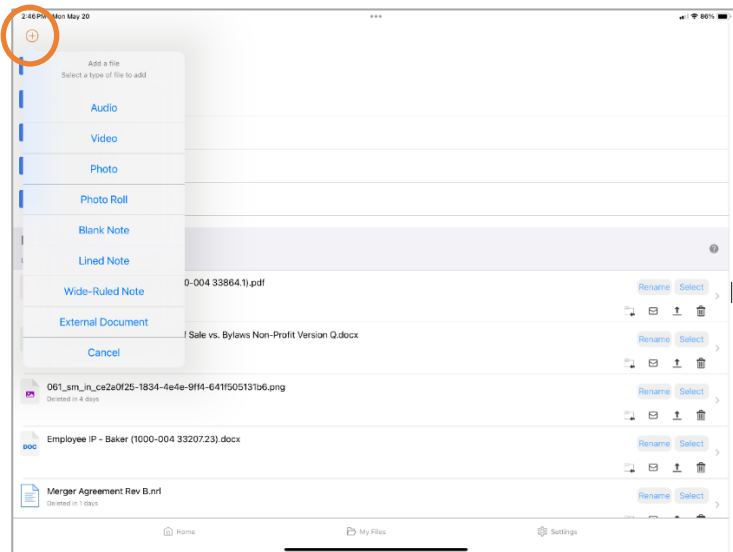


First, tap on the Select button to the right of the item. A checkmark will appear.

When files are selected the group action menu will appear in the upper right.

- Open all files
- Import/Upload all files to DMS or other file share
- Email all files
- Trash all files

Add an Audio, Video, Photo, or Note File; Import External Document



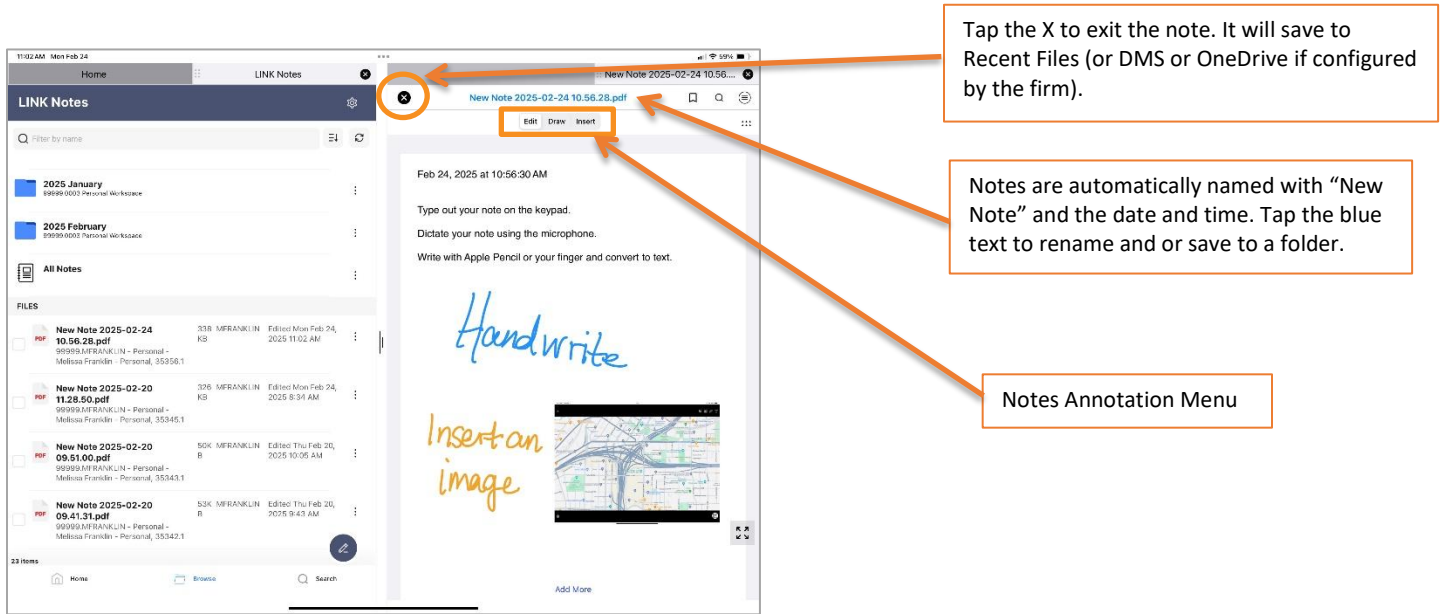
Tap the Plus “+” sign to create a new file, e.g., Audio or Video file or a new Photo, or to add a Photo from the Photo Roll.

Tap Blank, Linked, or Wide-ruled Note to create a new note.

External – this is an easy way to import a file from the Files app or other app to My Files.

Create a New Note

There are two ways to create a note in LINK. You can begin in My Files and tap the + in the upper left to add a new note. When you select Blank Note or Lined Note from the + menu, a new note will open.

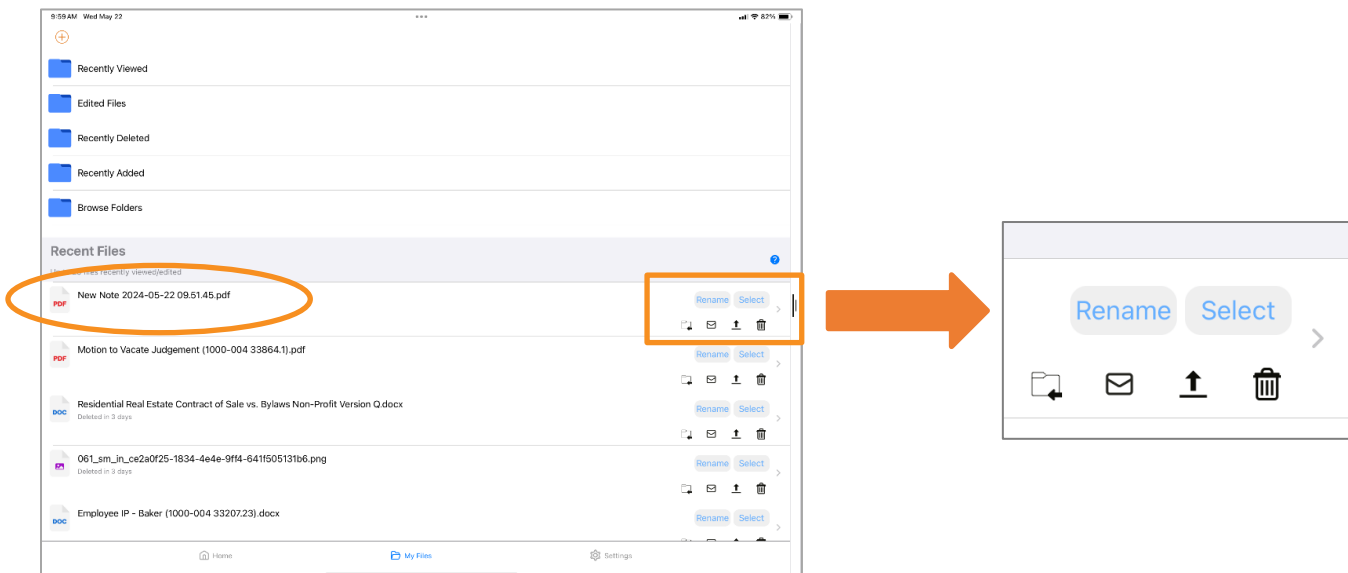


Use the annotation menu to handwrite or type a note. For instance, tap the pen point to write.

- You can write with your finger or Apple Pencil.
- You can also type or use the keyboard microphone to dictate.
- [See the Annotation tools here.](#)

When the note is complete, tap the blue file name to rename or save to a folder.

Or, tap the X to exit the note. It will save to Recent Files.



If you tap the X to close the Note, a new Note file will appear in the Recent Files section.

- It will also appear in the Recently Viewed folder.

If you have not checked-in the file to DMS (or another file share), the file will also appear in the Edited Files folder.

- Once you have checked the file into DMS or deleted it, it will no longer appear in the Edited files folder.

From the new file in Recent Files, use the icons to the right to set a new tag, email, import to DMS (or another file share), or delete.

Notes may automatically sync to your DMS or OneDrive, as set by the firm.

Auto-Save: as you create a Note, it will be auto-saved periodically.

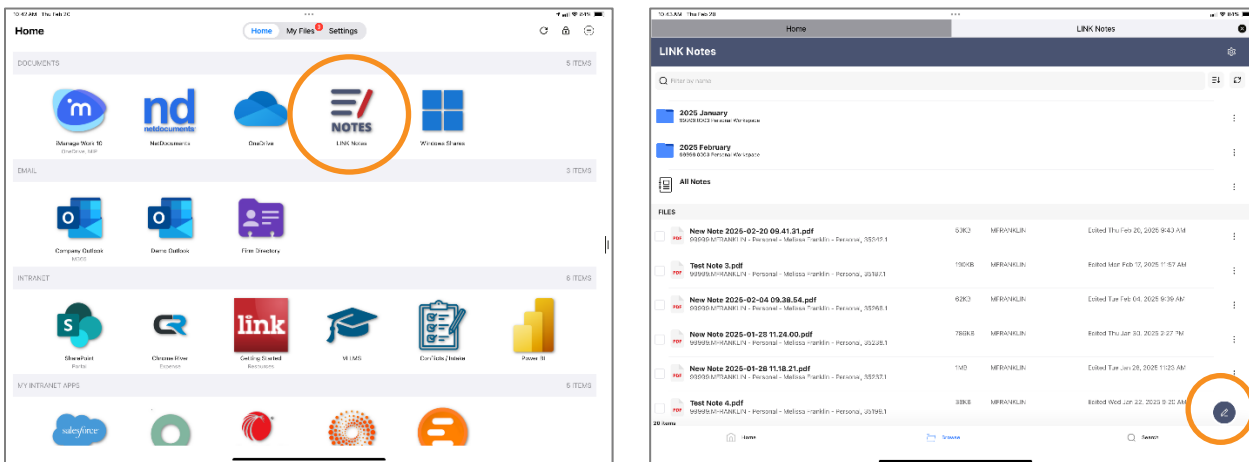
- Even if you close the Note without saving it, the Note will be saved to Recent Files.

Media File: When you create a new media file (audio or video) from the Plus “+” sign, the media file will automatically save to Recent Files in My Files.

Create a Note Using LINK Notes

The other way to create a note is to tap the LINK Notes tile from the home screen.

Tap the pencil in the lower right and select your action.



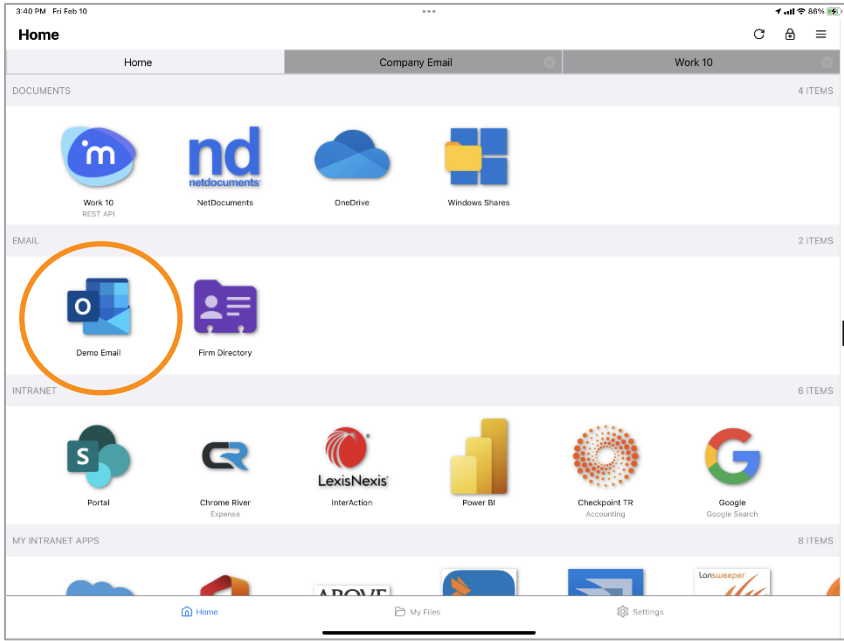
Follow the same process as above to create your note.

Notes may automatically sync to your DMS or OneDrive, as set by the firm.

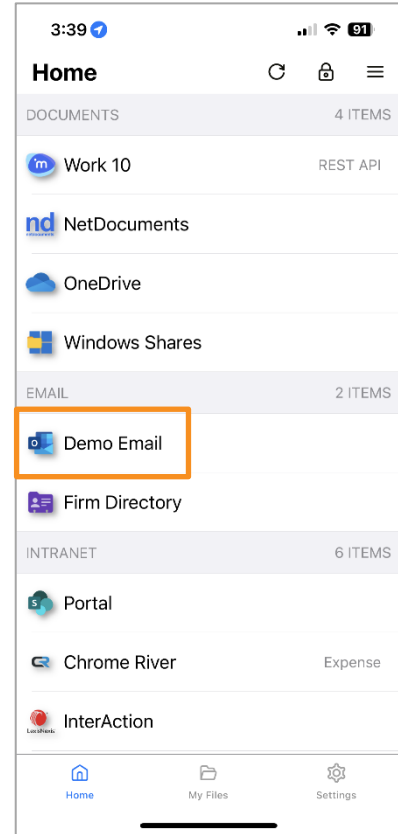
Also see:

- [LINK Notes Quick Tip](#)
- [LINK Notes Demo Video](#)

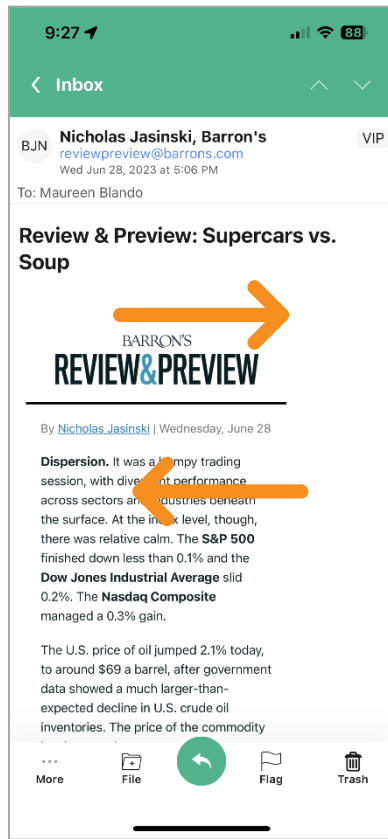
Using Email in LINK



Tap the Outlook tile.



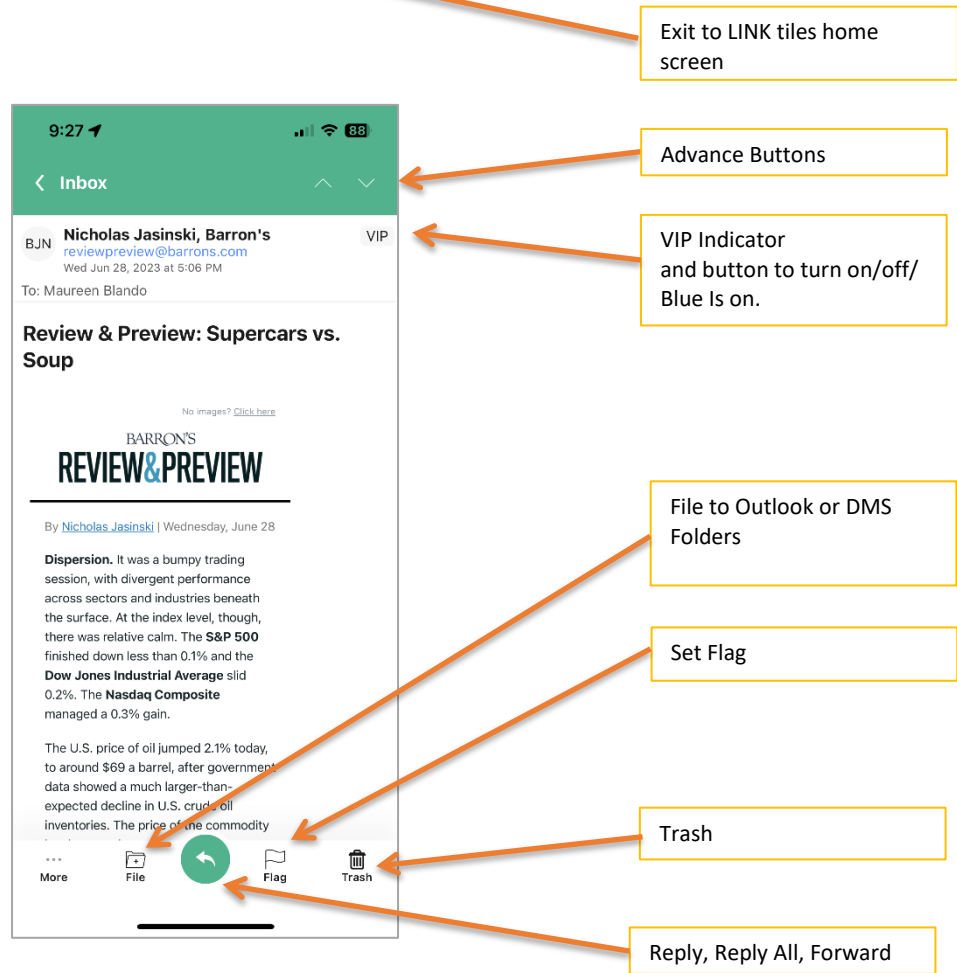
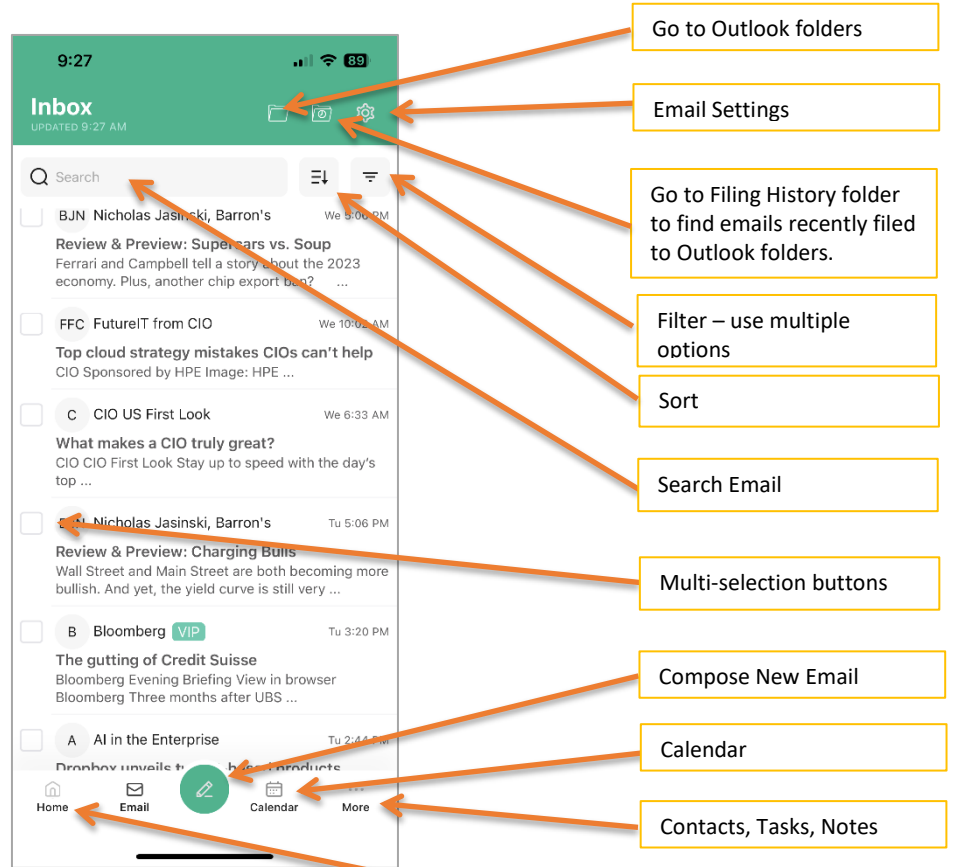
Advance Through Email – Two Ways



Use the up and down carats to advance through email.

Also, swipe left and right through email body to advance in either direction.

Email Inbox Icon Legend



Email Quick Tips

We have many guides and quick tips for using email in the [LINK Document Center](#).

Search “email” in the Document Center to see them all.

Here is a partial list of the Email tips and features:

[Email Folders - Hierarchy or Flat \(Outlook Folders\)](#)

[Preview Attachment Before Sending](#)

[PDF Attachment - Convert Email Attachment to PDF](#)

[Send-and-File - Turn On/Off](#)

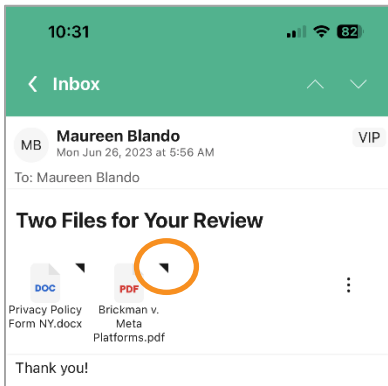
[Email Filing History - Find an Email Filed in Outlook](#)

[Email Multi-Selection Mode in the Inbox](#)

[VIP - Get VIP Alerts](#)

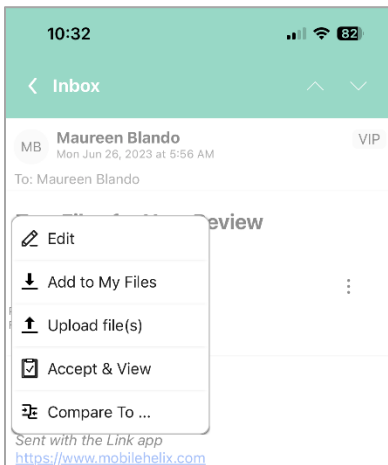
[LINK Undo - Undo an Email Send](#)

Email Attachment Actions Including Upload Attachment to DMS



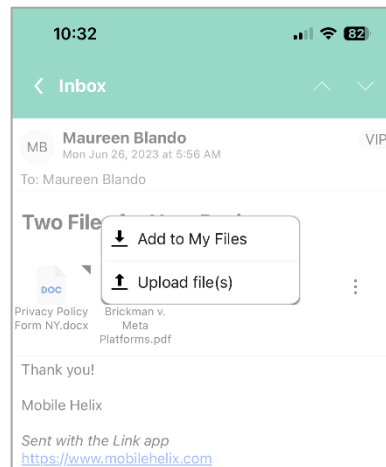
Tap on the file icon to open the file.

Tap the small triangle for the file action menu.



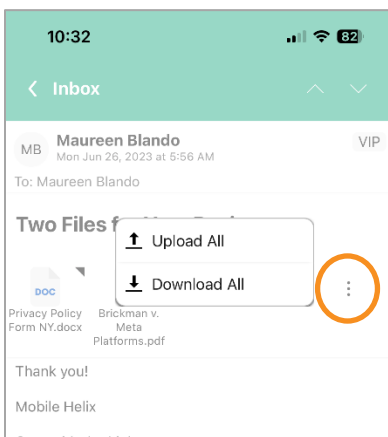
Word/Office file menu:

- Edit
- Add to My Files
- Upload file
- Accept & View (as a clean copy)
- Compare To



PDF file Menu:

- Add to My Files
- Upload file(s) to DMS or other file share



When there are multiple files attached:

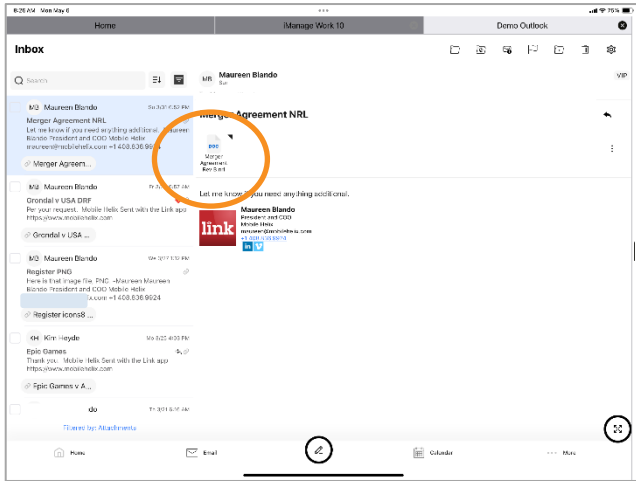
-Tap on the Ellipsis menu

Select an option:

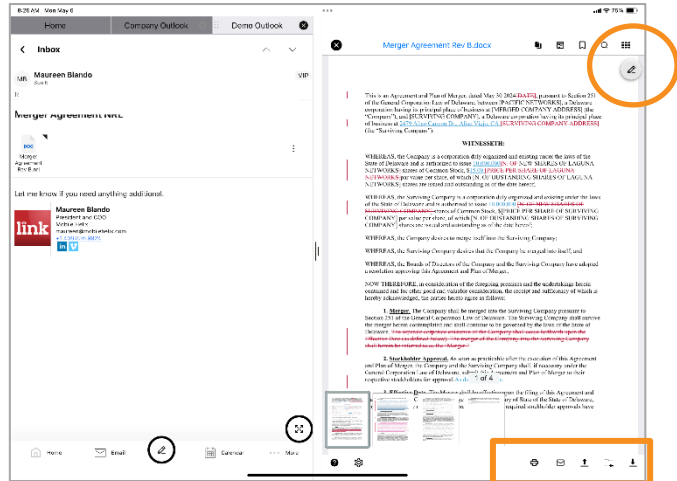
- View All – Open all files for viewing (iPad only)
- Upload All – Upload all files to a folder in DMS or other file share
- Download All – Save all files to My Files (the encrypted storage in the LINK app)

Open an NRL Attachment

Video: Open an NRL attachment and accept redlines



Tap on the NRL attachment icon to open the demo document.



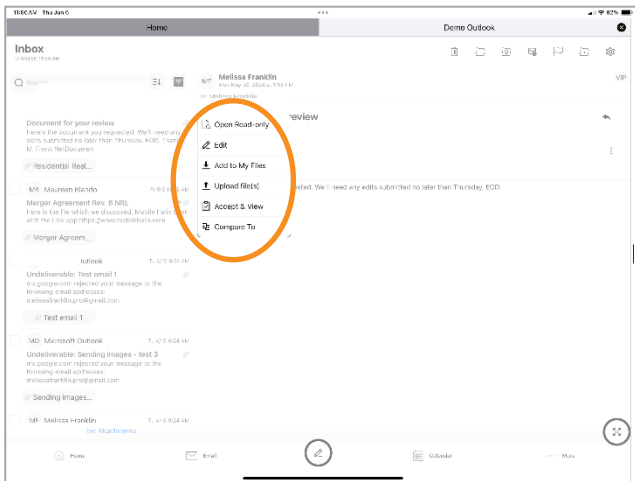
Document and any redlines are displayed.

Tap Pencil icon to edit or annotate.

Take actions in the lower right.

For more information, see [LINK Document Viewer Icon Legend](#).

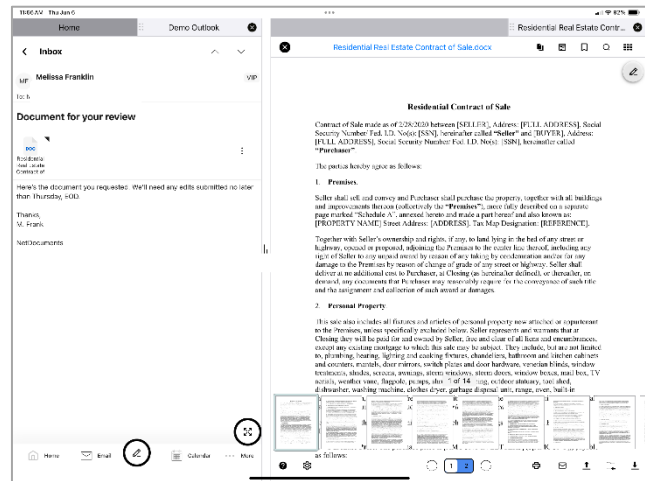
View NRL with Redlines Accepted



Tap on the small triangle to the upper right of the file icon to display menu.

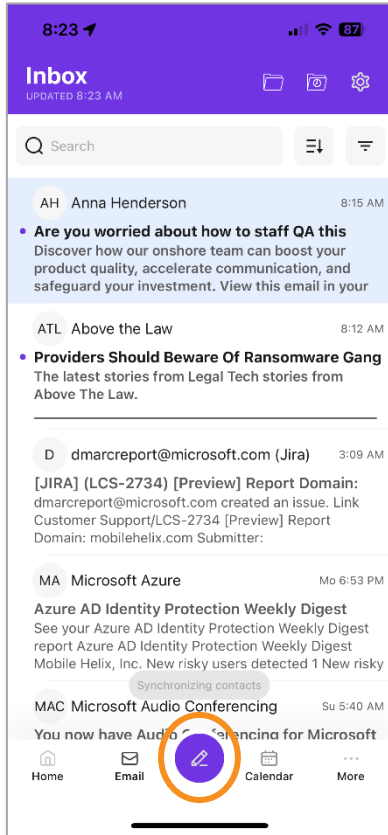
Tap "Accept & View."

For more information, see [LINK Document Viewer Icon Legend](#).



Document is displayed with all redlines accepted.

Compose & Send an Email



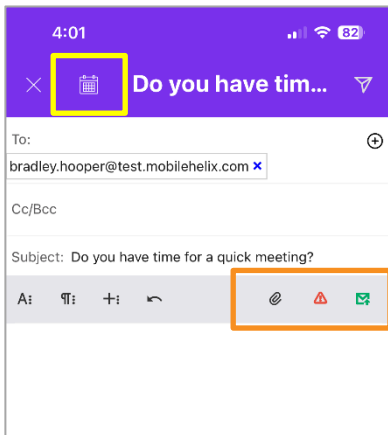
Tap the Pencil icon to compose a new Email.

Tap in the “To:” box.

Start typing a name, then tap on the target name.

Or use + symbol for name search.

Email Compose Icons



View Calendar

-Tap to view Calendar.

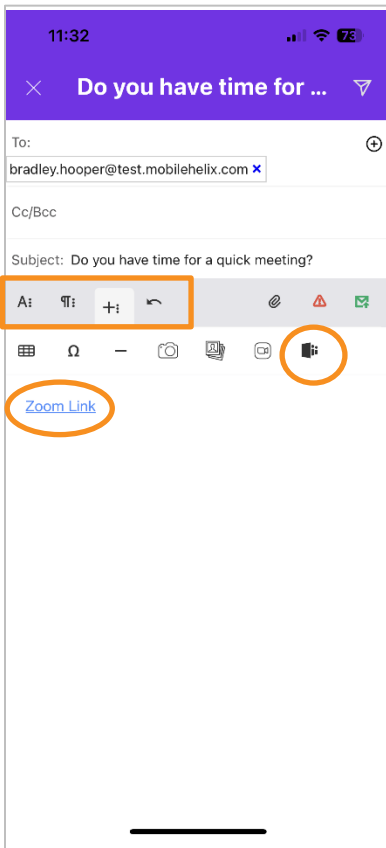
-When finished viewing Calendar, tap X to return to the Email Compose screen.

Attachment, Urgent, Send-and-File

-Add a file from DMS, new photo, or image from photo album – Paper Clip

-Mark as Urgent – Exclamation Point is red when turned on

-Send-and-File – folder icon is green when Send-and-File is turned on



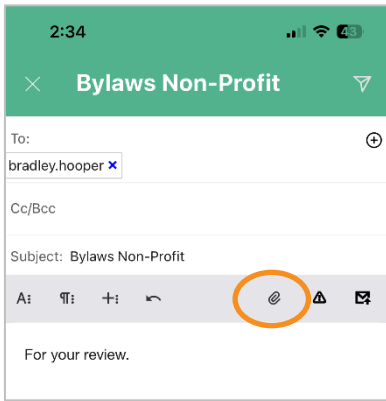
Email Editing Options

- “A” - Font-related
- “¶” - Page and paragraph formatting
- “+” - Add table, symbol, add a line above the text, new photo, image from photo roll (on Android, use paperclip to add photos), Zoom link, or Teams link
- Undo

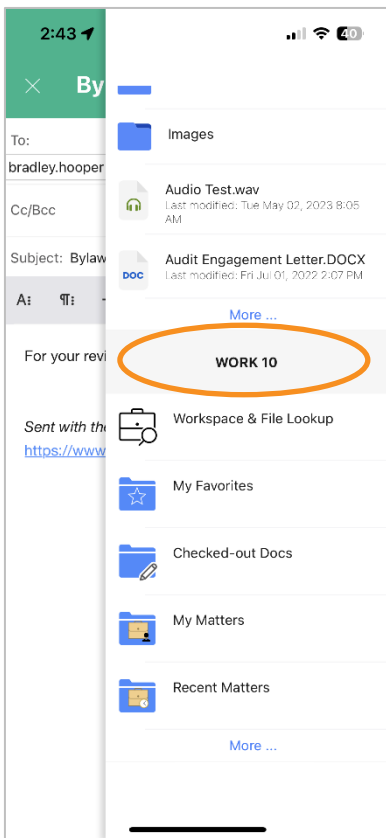
To add a Zoom or Teams link to an Email

1. Tap the + icon on the Edit panel.
2. From the expanded menu tap on either the Zoom (video camera) or Teams icon.
Note: On a tablet, the Zoom & Teams icons are visible on the panel without tapping the + icon.
3. A link will be added to the email body.
4. To rename the meeting link, press on

Attach a File from DMS or Another File Share

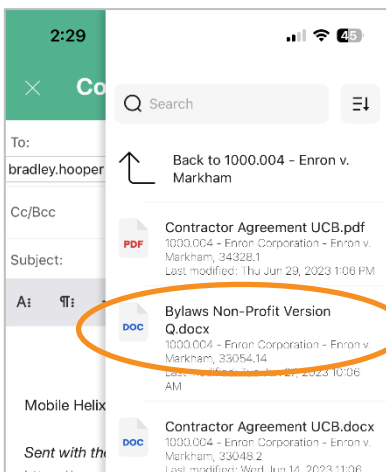


-Tap Paperclip icon (shown).



Filing destinations will appear.

-Tap iManage or another File Share.

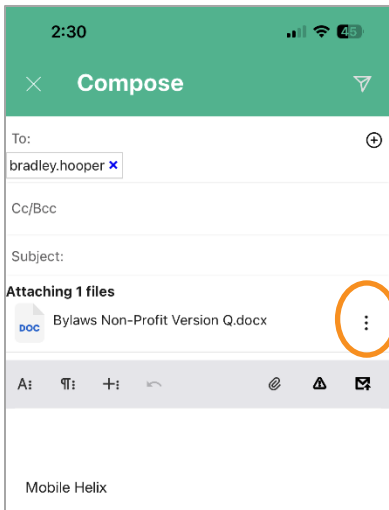


-Navigate to the target folder.

-Or, in the Search box, type:

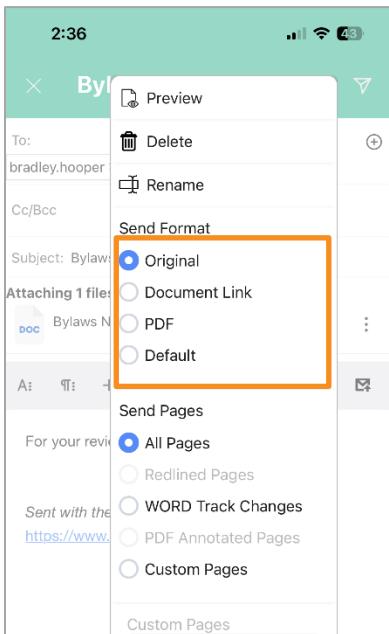
- Doc ID
- Key word(s) in File Name

-Tap on the file name to attach to the email.



File is attached as the original format. Here, .docx.

For file options, tap the Ellipsis menu.



Attachment options include:

-Preview, Delete, Rename

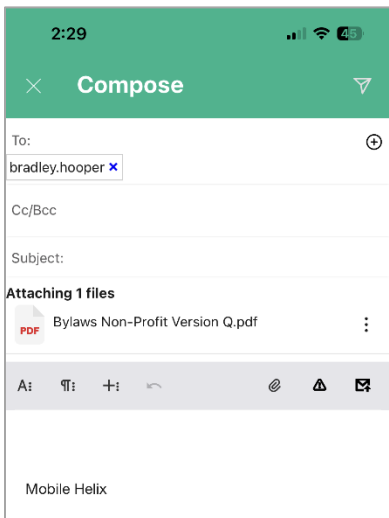
-In the rectangle, you can select to send the attachment as:

-“Original” (e.g., .docx)

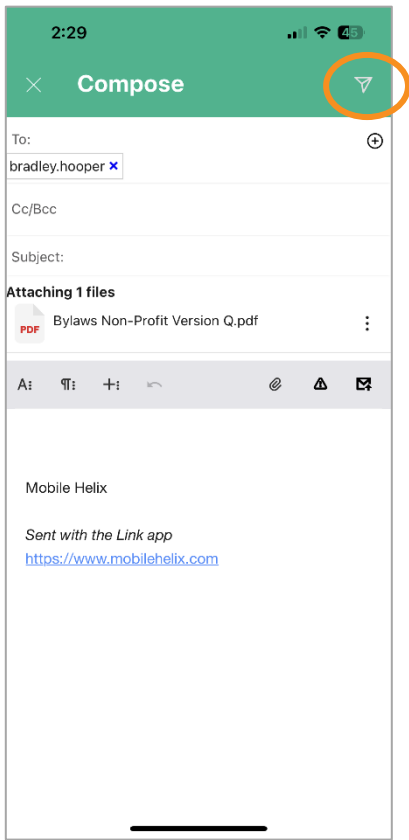
-“Document Link” (.nrl) or ND link

-PDF

Here, tap PDF button.



Now the file is attached as a PDF.



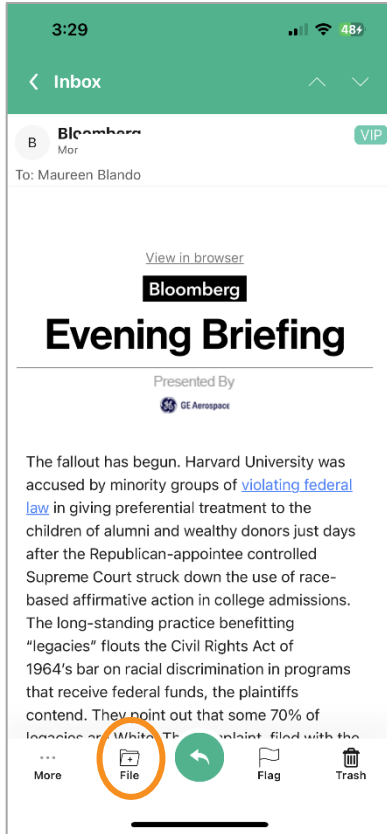
Complete the Email.

Tap the paper airplane to Send.

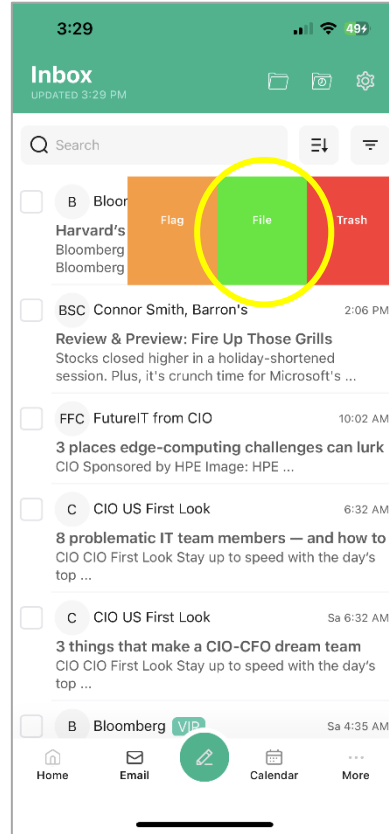
File an Email to DMS Including Predictive Filing

Initiate Filing an Email to DMS

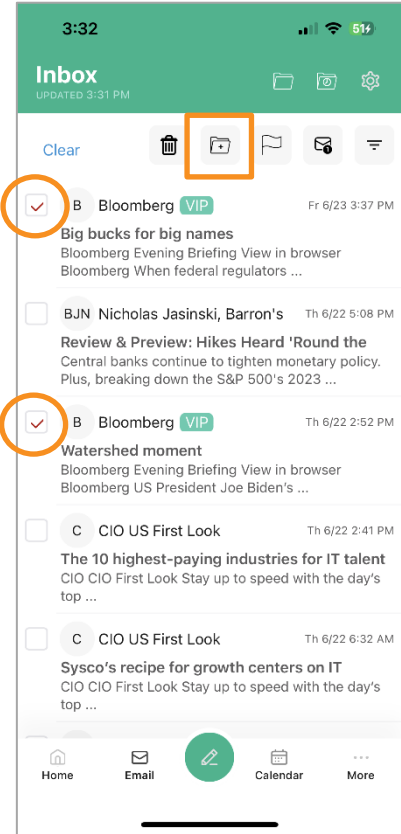
There are multiple ways to initiate filing an email, on either a smartphone or tablet.



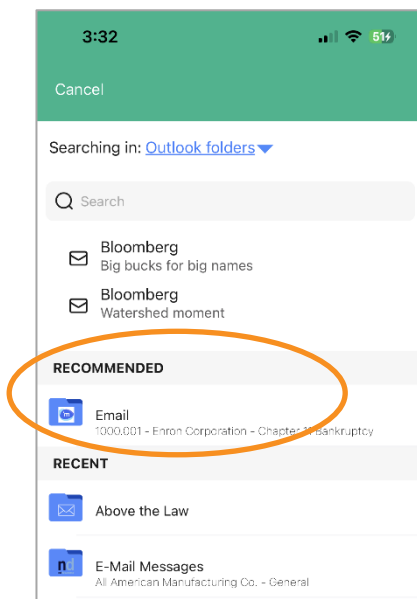
1. From the open email, tap the Folder+ icon.



2. From the Inbox, swipe left on the email and tap File.



3. File multiple emails at once by checking several boxes. Then, tap the Folder+ icon. Or, swipe on one of the checked emails and select File.



Tap:

-Recommended folder or

-Recent folder.

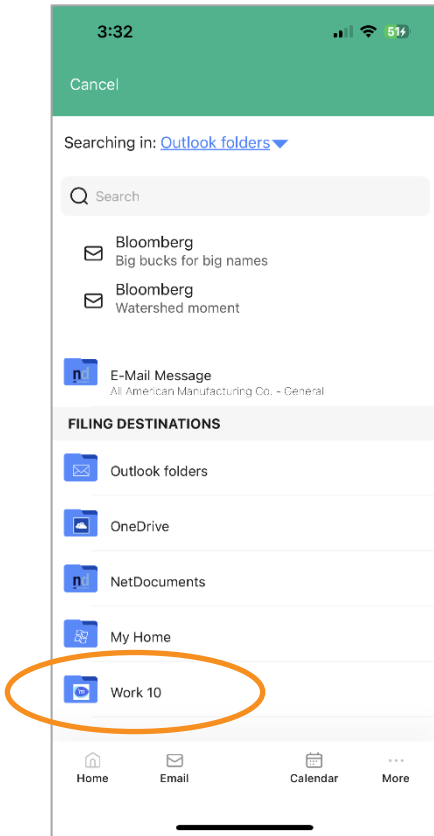
Or file manually. See below.

Note on Predictive Filing:

Once you file an email with a correspondent 2 or 3 times, Link will offer a Recommended folder based on your history.

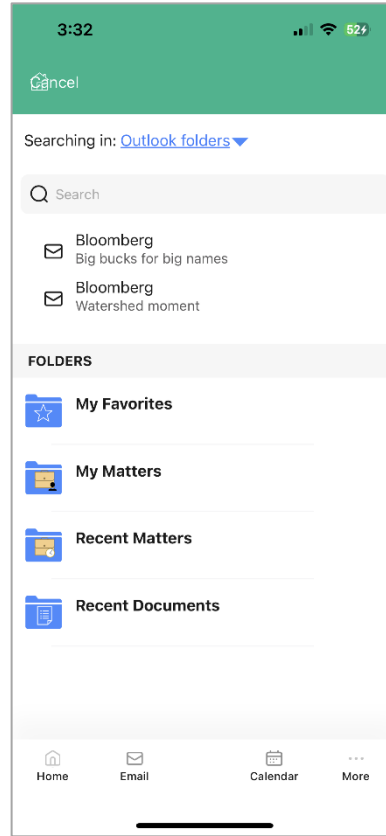
Manual Filing to DMS

Initiate the filing as shown above.



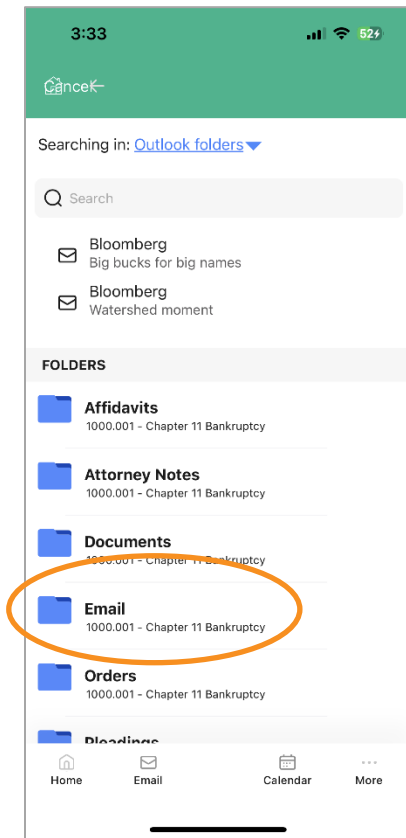
From the filing screen, scroll down to “Filing Destinations.”

Tap on the target DMS or file share.



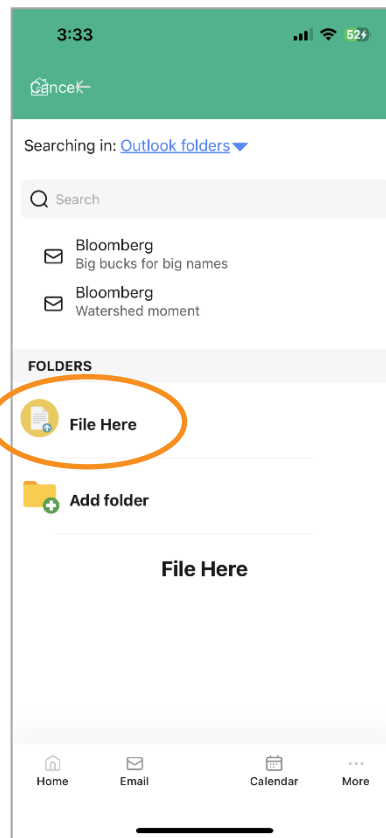
Now in DMS in LINK, you can either **navigate** to the target folder. Or **search** for the Client by typing the Client name in the Search bar.

Navigate or Search to the Target DMS Folder



Navigate to the target Email folder.

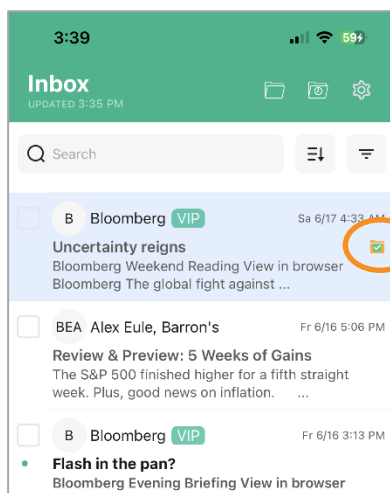
Tap on it.



Tap "File Here."

Your email is filed.

Email Filed to DMS - Indicator



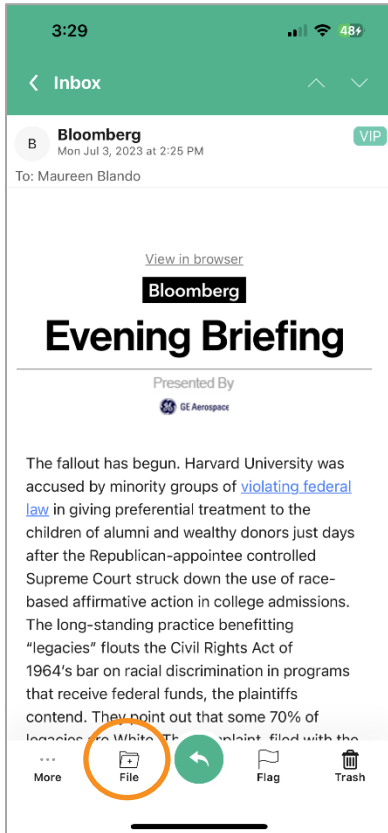
Emails which are filed to DMS have a green checkmark in the Inbox.

Note: To remove or keep emails filed to DMS in your Inbox, go to Email Settings.

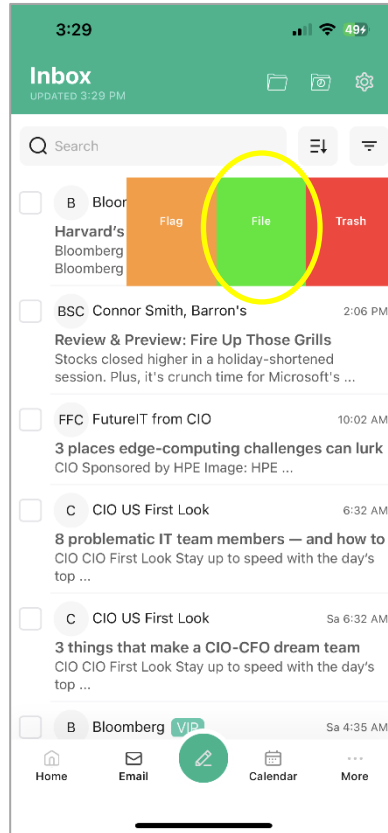
[More on Email Settings](#)

File an Email to an Outlook Folder

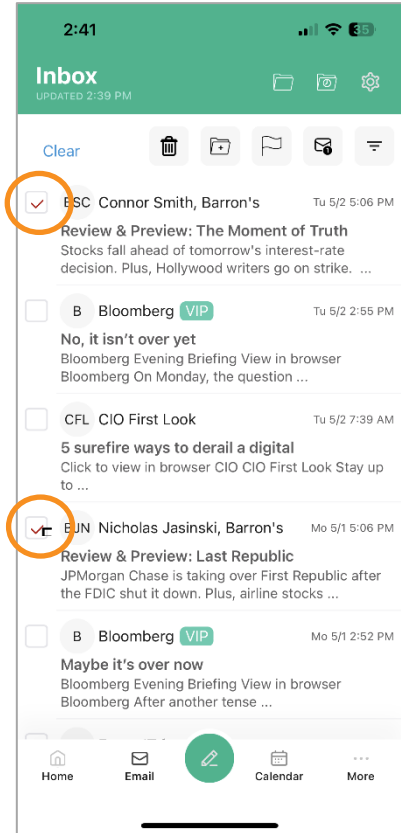
There are multiple ways to initiate filing an email, on either a smartphone or tablet.



1. From the open email, tap the Folder+ icon.

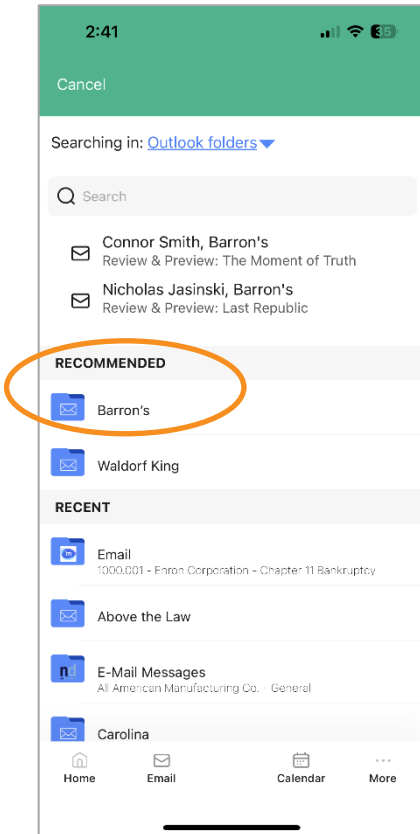


2. From the Inbox, swipe left on the email and tap File.



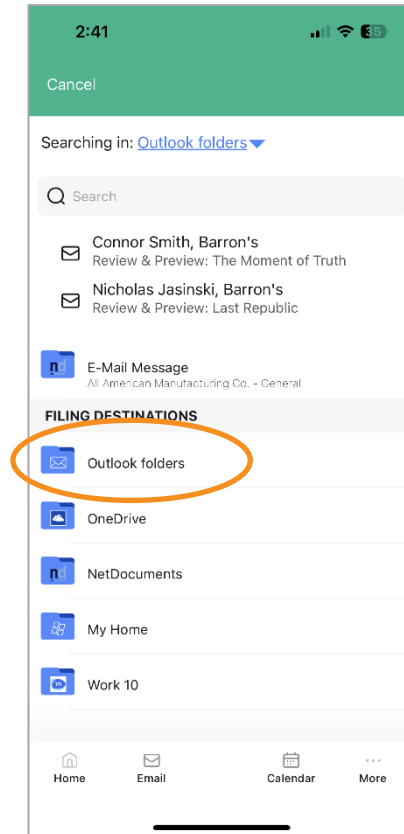
3. File multiple emails at once by checking several boxes. Then, tap the Folder+ icon. Or, swipe on one of the checked emails and select File.

On the Filing screen...

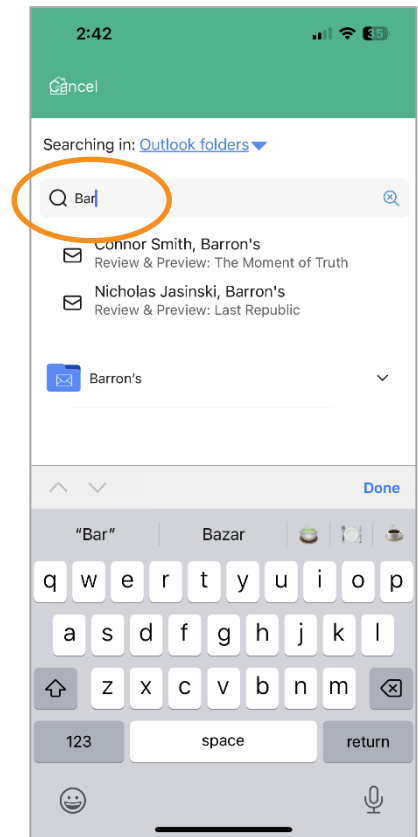


With LINK's predictive filing, the folder may be in "Recommended."

If so, tap on it to file.



To manually file, tap on "Outlook folders".



In the Search box, type a few letters of the target Outlook folder name.

Tap on the target folder name.

Predictive Filing

LINK has built-in Predictive Filing to both DMS and Outlook folders.

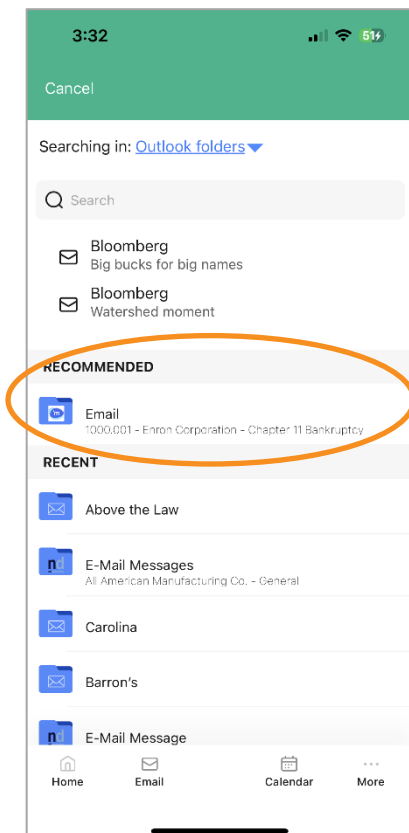
After you have filed an email with a correspondent to the same DMS or Outlook folder 2 or 3 times, LINK will suggest a Recommended folder on the filing screen.

You may tap on a Recommended folder or Recent folder or scroll down to Filing Destinations to manually file to Inbox/Outlook folders or other file repositories.

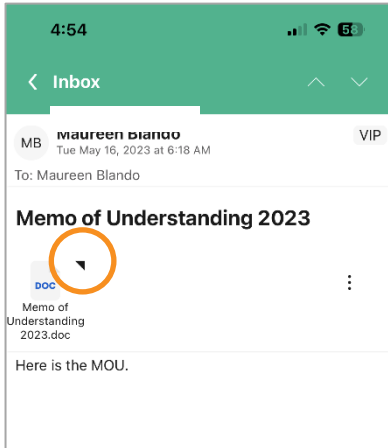
Initiate the filing, [as above](#), by tapping on the Folder icon in an open email or swiping on an email in the inbox and tapping File.

The filing screen below is displayed. You may tap on the Recommended folder to file.

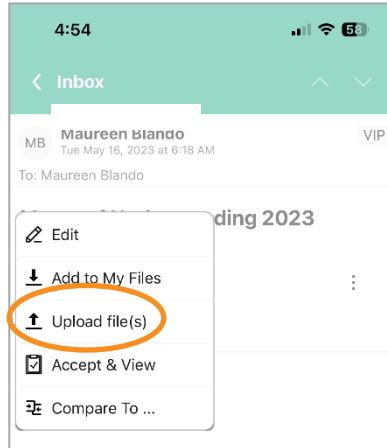
In the Recommended section, tap on the target folder. Your email is filed.



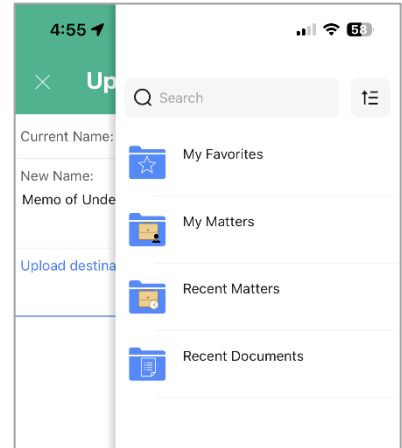
Import an Email Attachment to DMS



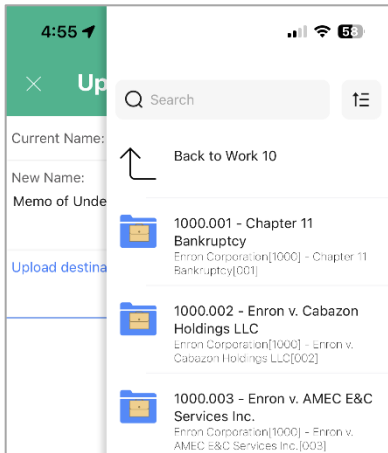
Press on the small triangle.



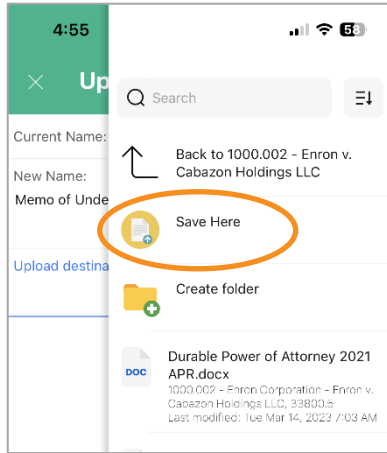
Tap "Upload file(s)."



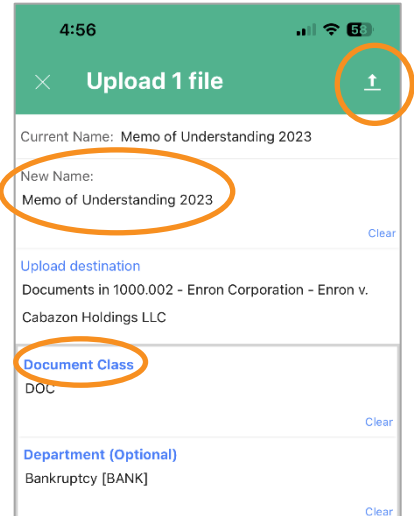
Navigate or search to Client/Matter.



Navigate or search to target folder or file.



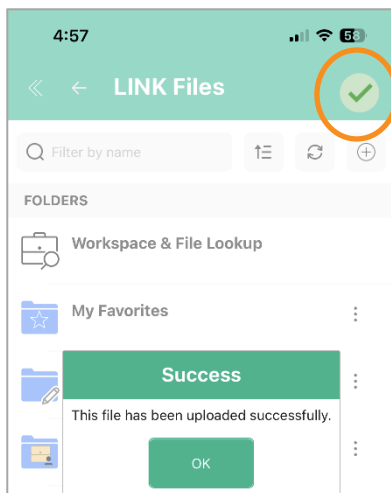
In target folder, tap, "Save Here." Or, to save to a current Doc ID, tap on the file.



To change Doc Class or Dept, tap blue text for list.

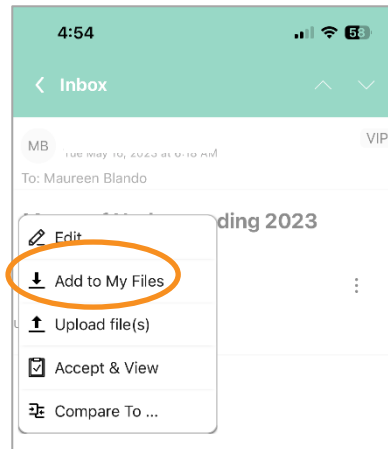
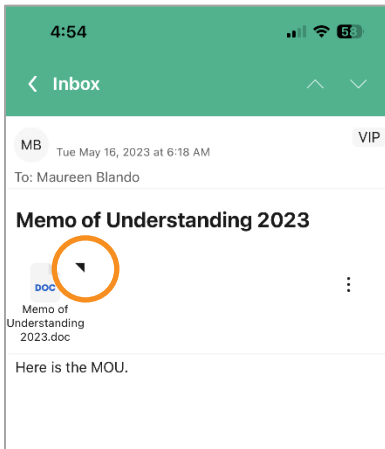
You may rename in "New Name" field.

Tap Upload button to check-in.



Green checkmark indicates file is checked in.

Save an Attachment to My Files Local Storage in LINK



Press on the small triangle.

Tap on “Add to My Files.”

The file is now saved to My Files in LINK.

The file may be an Office file, PDF, Visio, DMS link, or media file.

You may view the file offline or online.

Also see: [My Files](#).

LINK VIP Feature for Managing Your Inbox

LINK has its own VIP category in Email. VIPs are key Email correspondents for whom you want to get a special Alert sound when their emails arrive.

You can also Sort and Filter your Inbox by VIP.

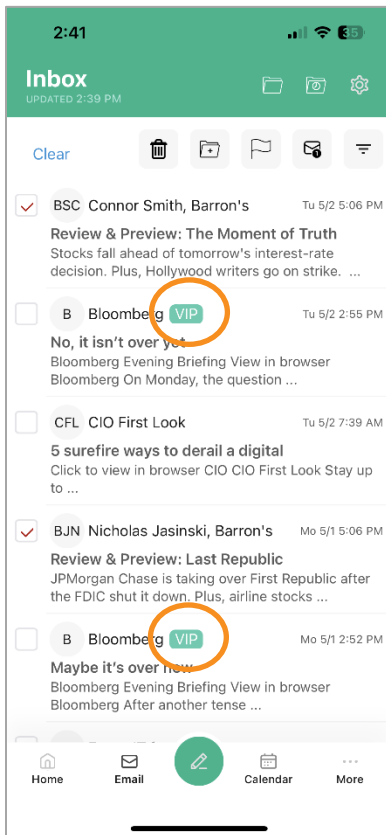
A benefit of VIP in LINK Email is that it is very quick to set (or clear) a sender as VIP. For example, if you are expecting a key Email from someone, mark that person as a VIP. Then you will hear a special sound when a VIP email arrives. No longer need to monitor their email? You may quickly clear their VIP status.

[Click here to learn more about using LINK VIP.](#)

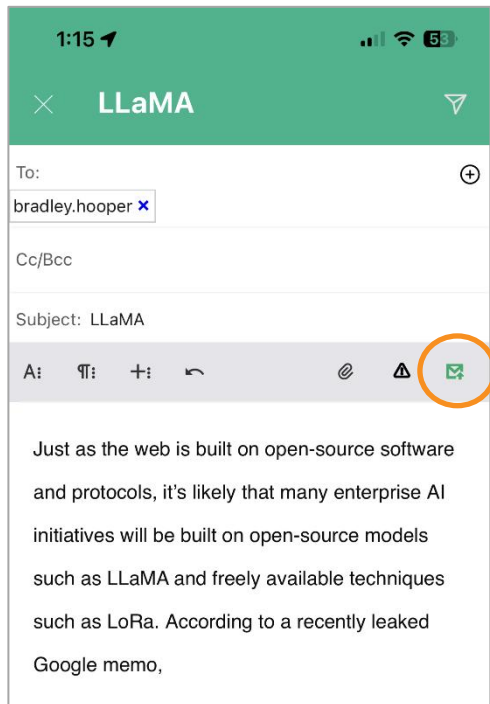
-Set a Sender as a VIP

-Filter and sort by VIP

-Setup VIP Email Notification Alerts



Send-and-File to DMS or Outlook Folders

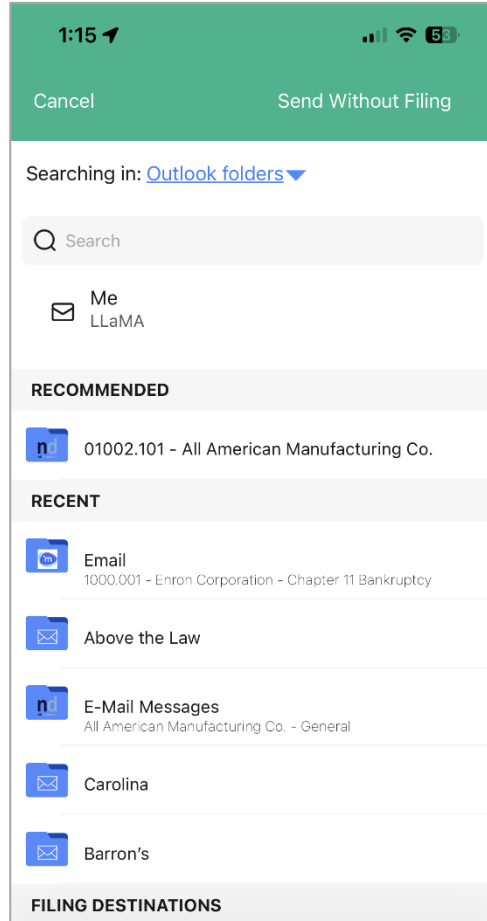


Compose an email.

Tap the envelope icon to turn on Send-and-File. Green is on.

Tap either paper airplane to send.

You will then be presented with the filing screen below.



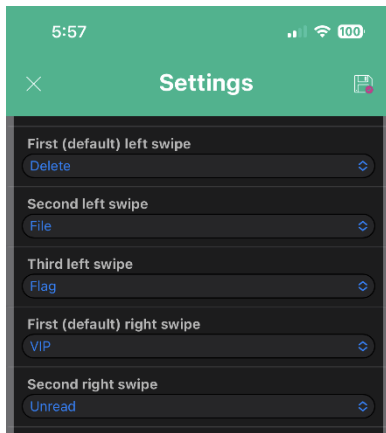
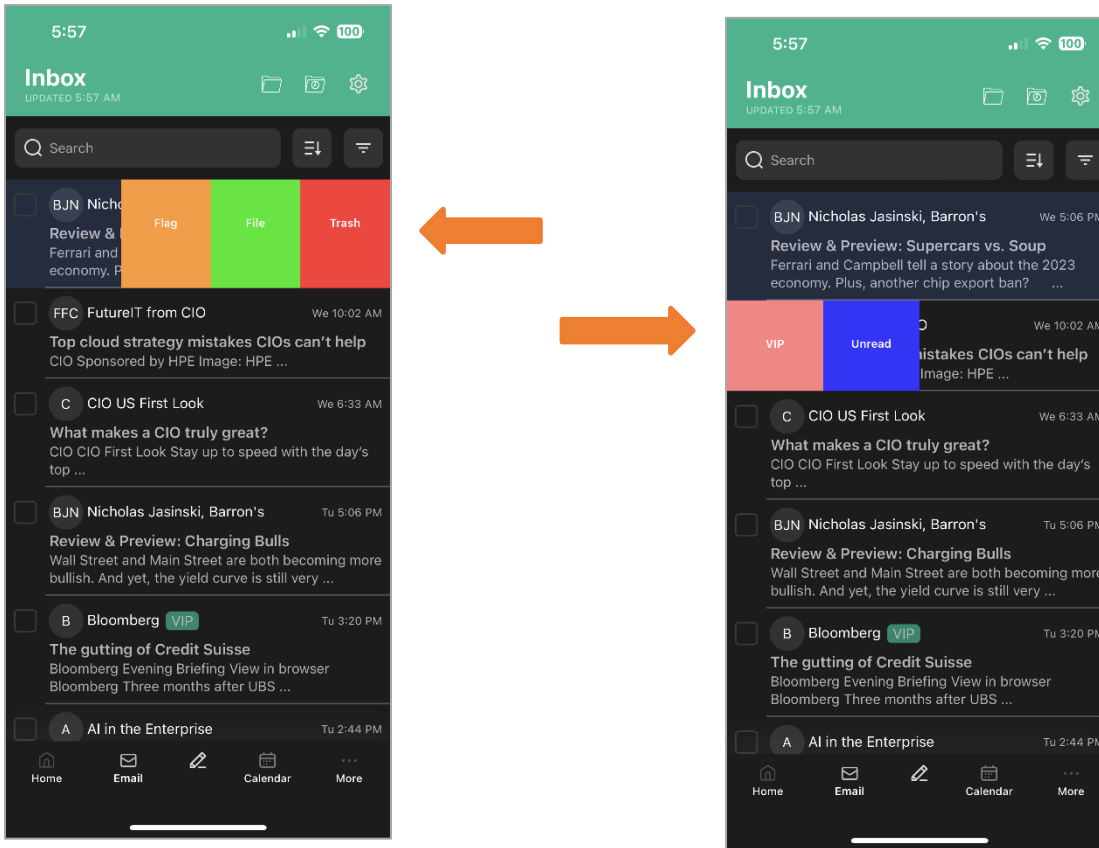
Filing Screen

To file, tap a folder in:

- Recommended
- Recent
- Filing Destinations – Including DMS and Outlook folders

[More on Filing Here](#)

Email Swipe Commands



Configurable Swipe Menus

Go to Settings:

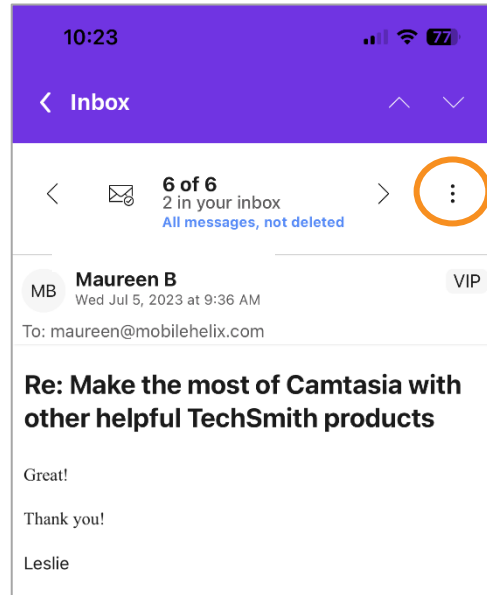
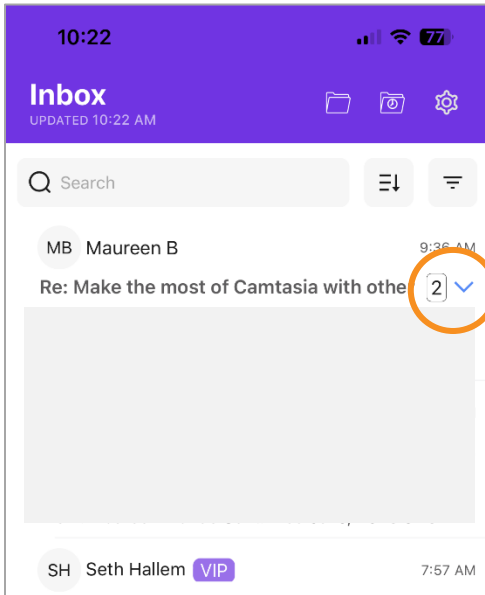
Email Inbox > Gear Icon

Set 3 right to left swipes.

Set 2 left to right swipes.

Threaded View in Email

Turn on **Threaded View** in the LINK Email Settings: Email Inbox > Gear Icon> Under Appearance and Navigation: Organize mail by thread> Toggle on by tapping “Yes”> Tap the Diskette Icon to save.



Threaded emails have a counter and an up/down carat to the right of the Subject line.

When you act on a threaded email as a single entry in the Inbox, the action will apply to the entire thread. For example, if you swipe to Trash or File an email, that action will be applied to the thread.

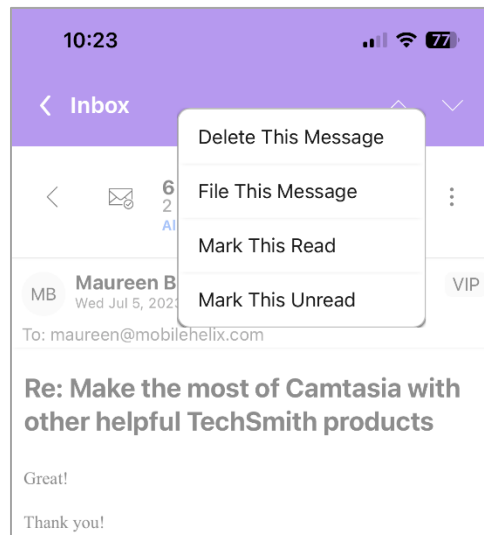
To act on a single email, tap the down carat and act on the target email only.

From the open email, tap on the Ellipsis icon to get the action menu, below and select your desired action.

- Delete This Message
- File This Message
- Mark This Read
- Mark This Unread

Note: There are two counters of the number of emails in a thread.

1. Inbox summary counter: does not include sent or deleted emails
2. Counter in email header: includes sent and deleted emails.



Email, Calendar, Contacts, Notes & Tasks

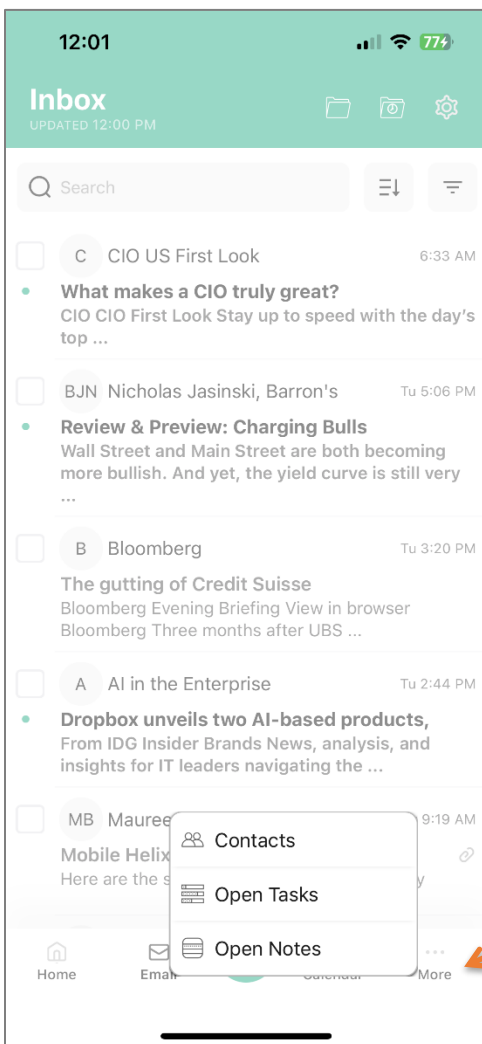
LINK is integrated with Microsoft Exchange. Therefore, all of your Outlook applications are synced with your desktop and M365 Outlook.

Email Settings

LINK Email has many user Settings options.

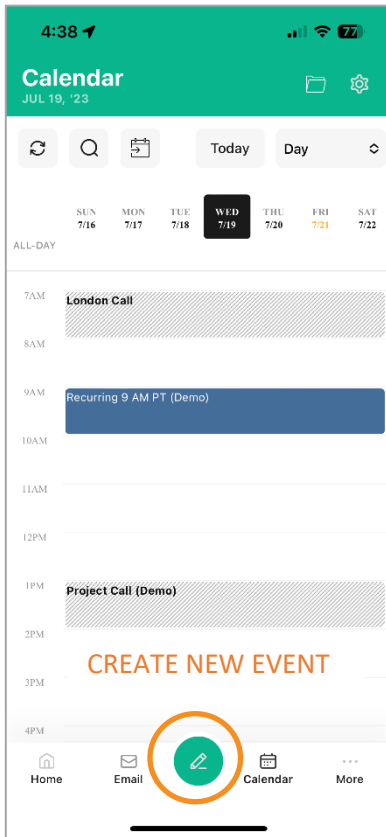
From the Inbox > Gear icon in upper right

View the [Email Settings Guide](#) in the LINK Document Center




Contacts, Tasks, & Notes:
Tap on the More button
from the Email Inbox.


Calendar




Icons

 Shared Calendar Folders

 Settings Gear

 Refresh Calendar

 Search Calendar

 Go to Date (tap)

Day (Views)

- Day

- Week

- Month

- Agenda

 New Calendar Event

Calendar Tips

New Event: Tap Pencil or tap in the calendar body at the planned time.

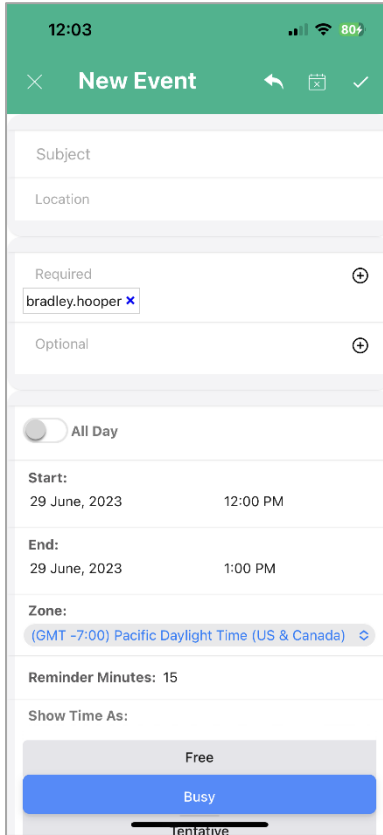
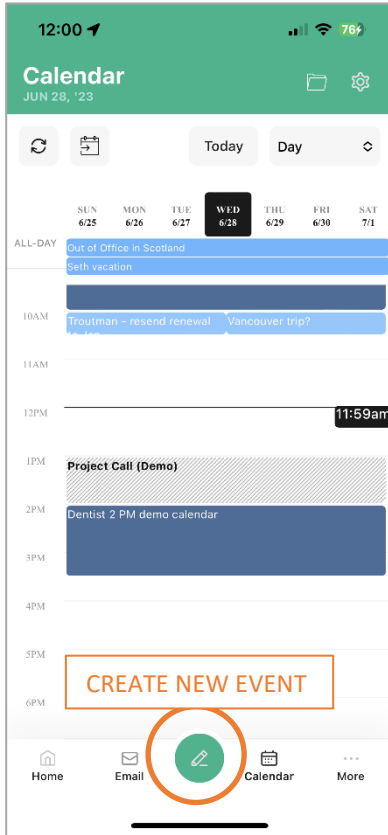
To Edit or Cancel Event Made by You: Press-hold on event.

To Change Your Response to an Event: Press-hold on event.

Advance Calendar: Swipe right or left in event body.

Learn more about [LINK Calendar features here](#).

Create a New Calendar Event



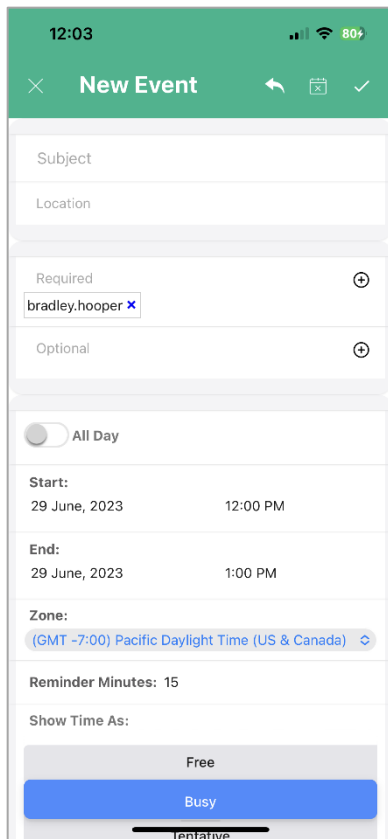
Icons

- X Close Event
- ↩ Reply, Reply All, Forward
- 📅 Free/Busy Scheduler
- ✓ Save Event

You can also add **Zoom** or **Teams** meeting link to a calendar event – you can [learn more about that here](#).

Learn how to create a [Calendar Event from an Email here](#).

View Free / Busy Scheduler



12:03

New Event

Subject

Location

Required
bradley.hooper

Optional

All Day

Start:
29 June, 2023 12:00 PM

End:
29 June, 2023 1:00 PM

Zone:
(GMT -7:00) Pacific Daylight Time (US & Canada)

Reminder Minutes: 15

Show Time As:

Free

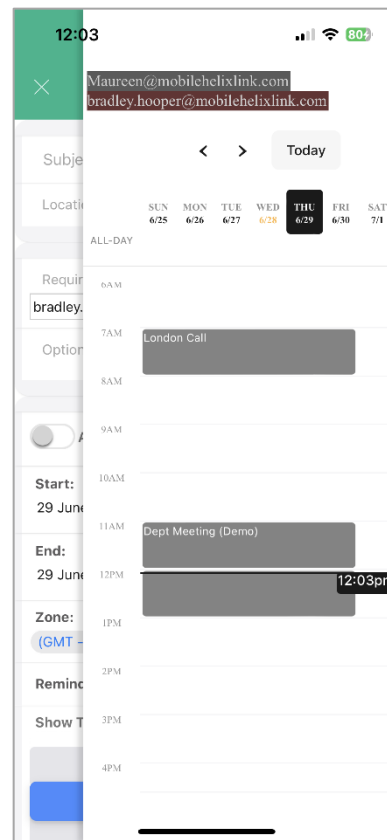
Busy

Tentative

Add Required and Optional attendees.

Tap “Free / Busy” icon (calendar with X) shown above.

Learn more about using the [Free / Busy Scheduler here](#).



12:03

Maureen@mobilehelixlink.com
bradley.hooper@mobilehelixlink.com

Subject

Location

Today

SUN 6/25 MON 6/26 TUE 6/27 WED 6/28 THU 6/29 FRI 6/30 SAT 7/1

ALL-DAY

Required
6AM
bradley.hooper

Optional
7AM London Call

8AM

9AM

Start:
29 June 12:00 PM

End:
29 June 12:03 PM

Zone:
(GMT -7:00) Pacific Daylight Time (US & Canada)

Reminder
2PM

Show Time As:

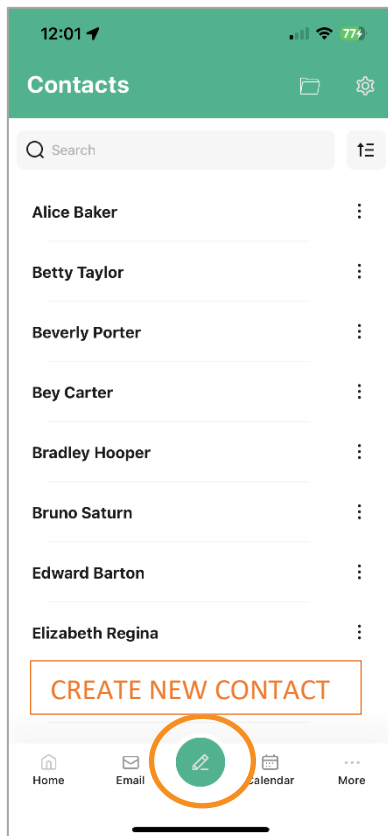
3PM

4PM






Tap on the event body to return to the New Event screen.

Contacts – Settings and Icons

Contacts Settings – tap the Gear icon in the upper right.

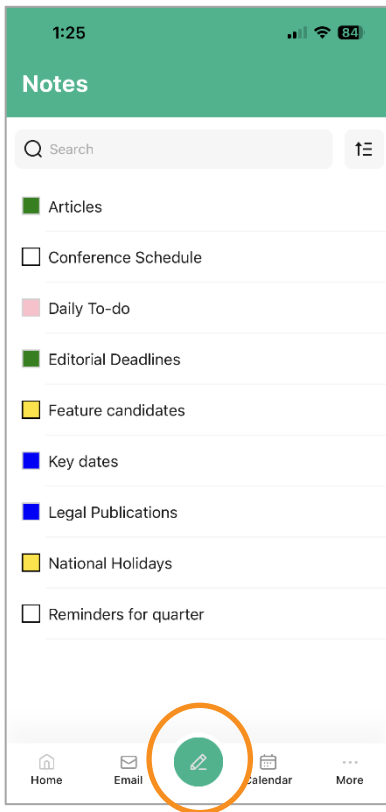


Icons

-  New Contact
-  Settings Gear
-  Contacts Folders
-  Search by Name
-  Sort Icon
 - By Company
 - Email Address
 - First Name
 - Last Name
 - Full Name


Tap twice to reverse order.


Notes



Icons

 New Note

 Search by Name

 Sort

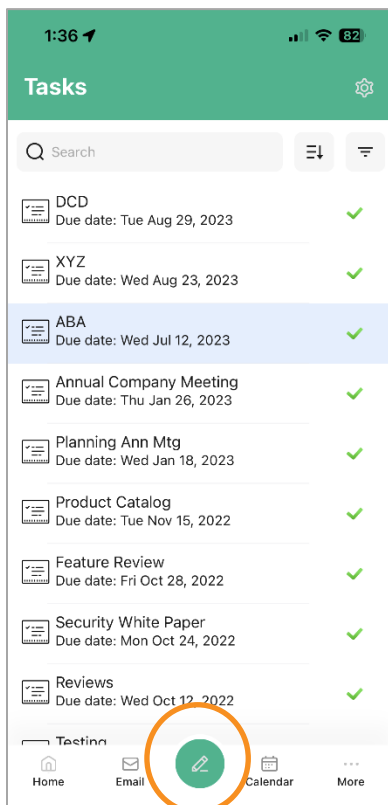
- Color
- Subject

Tap to reverse Sort order.

To Edit a Note: Tap on the Note.


Learn more about using [LINK Notes here](#).


Tasks



Icons

 New Task

 Search by Name

 Sort

- Completed Date
- Due Date
- Completed
- Priority
- Start Date
- Status

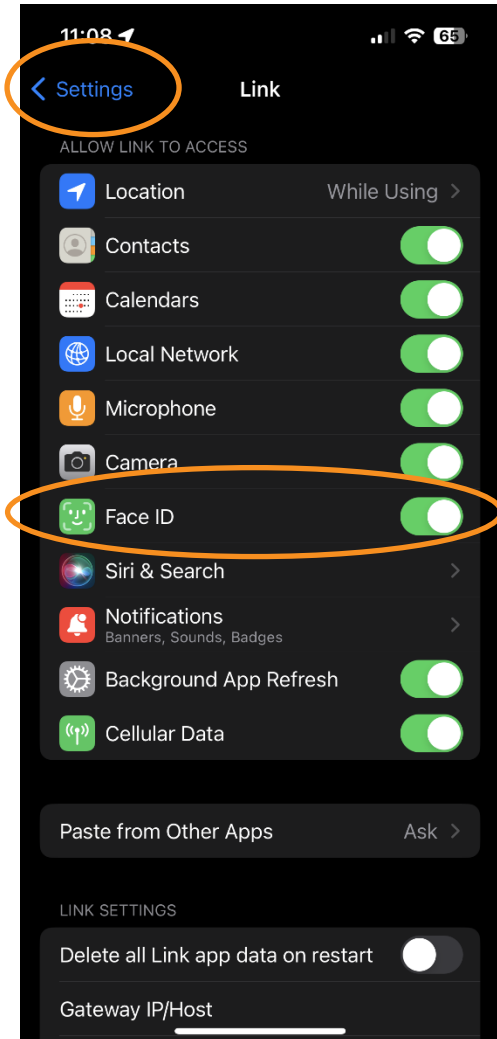
Tap criterion to reverse Sort order.

To Edit a Task: Tap on the Task.

Face ID

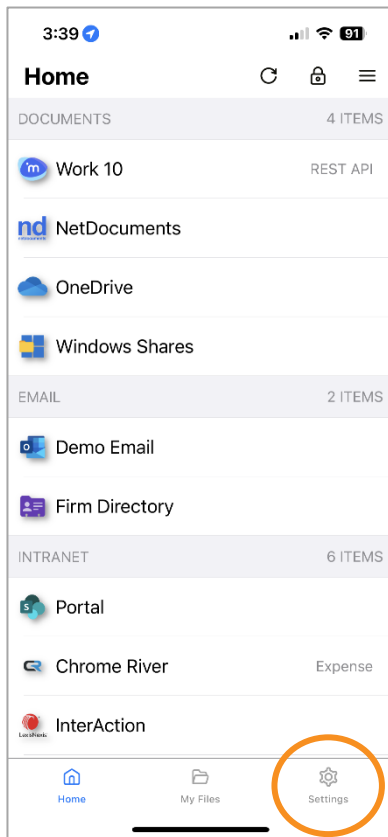
If you are not being prompted for Face ID, check that in iOS Settings, Face ID is toggled on

Settings > Apps > Link > Toggle on Face ID



In Android, to turn on Face Recognition: Settings > Biometrics and security > Face Recognition > Register Face

Set a Default App in LINK

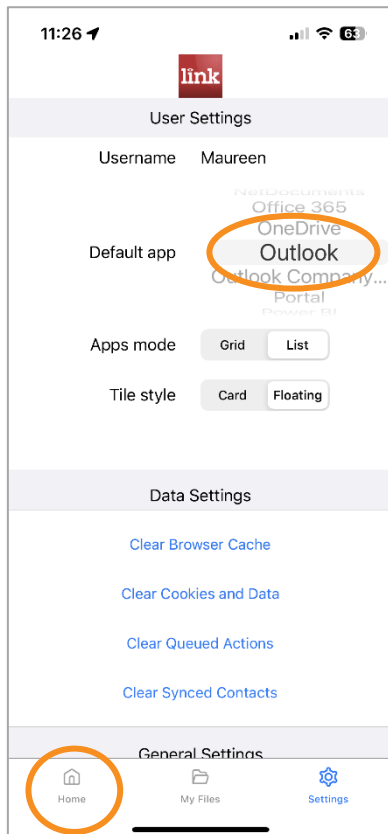


What is a Default App in LINK?

If you set a Default App, when you open the LINK app, LINK will open directly to the Default App.

Go to Home Screen Settings to select a default app.

From LINK Home Screen, tap Settings tab.



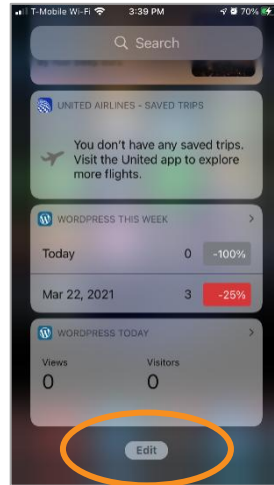
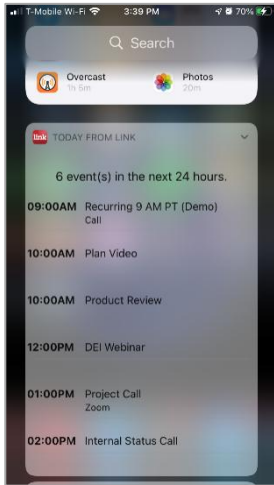
Select the app to be used as the default.

Tap Home to save the selection.

“Today from LINK” Widget – iOS

“Today from Link” is a widget which displays your appointments for the next 24 hours.

Tap on an event in Today in LINK to go to it in your LINK calendar.



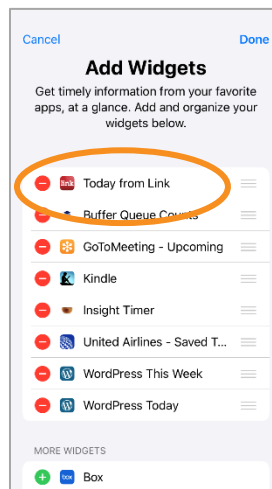
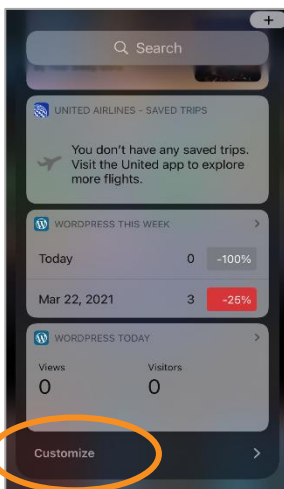
Today in LINK

From the iOS home screen, swipe right to see the Widgets page. Tap Edit at the bottom.

Add Today in LINK to Widget Screen

Scroll to bottom of widgets.

Tap Edit.



Scroll to the bottom again.

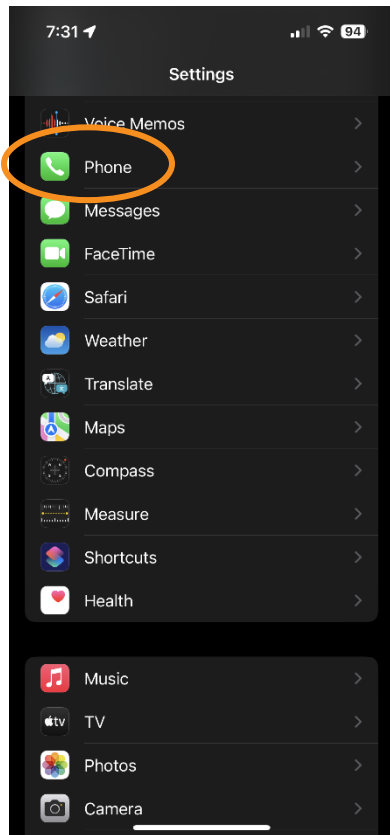
Tap “Customize.”

Tap the green “+” to add Today in LINK to the widget Screen.

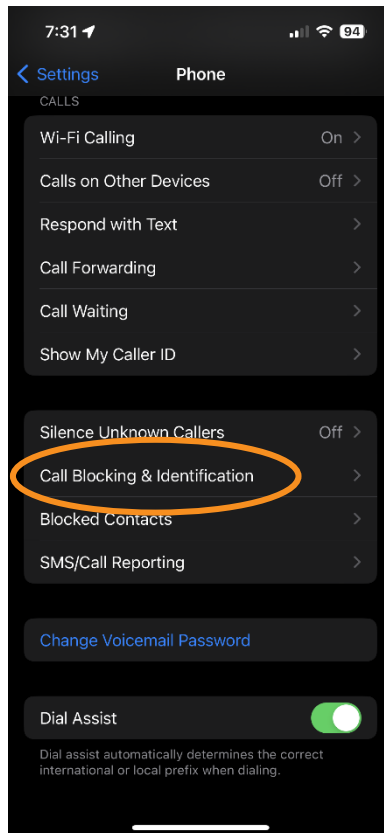
Tap “Done.”

Incoming Caller ID

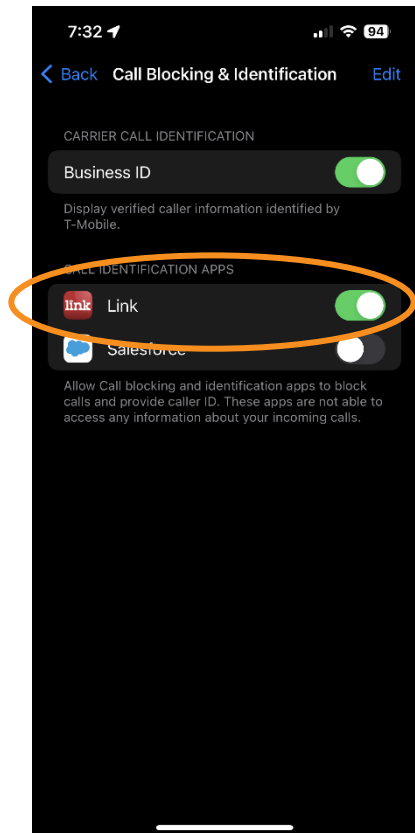
This feature allows LINK to populate the native iOS caller ID database with your Outlook contacts and, if configured, your Global Address List.



Go to Settings, tap “Phone.”



Select Call Blocking & Identification.



Toggle Link to on/green.