iCERF

Collaborative Electronic Research Framework™

Lab-Ally LLC • 1-614-407-4547

This document is available online at:
http://cerf-notebook.com/files/pdf/icerfmanual.pdf

Welcome to iCERF

the CERF Client for the Apple iPad™

The iPad™ CERF Client is an easy to use way of accessing your CERF Notebooks and File Cabinets from your iPad, without using the Web Interface. To get started, all you'll need to know is your *CERF SERVER ADDRESS and Port,* your *CERF Login Name*, and your *CERF Password.*

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Getting Started

Launch the iCERF application on your iPad. When the app loads it will immediately take you to the Configuration screen:
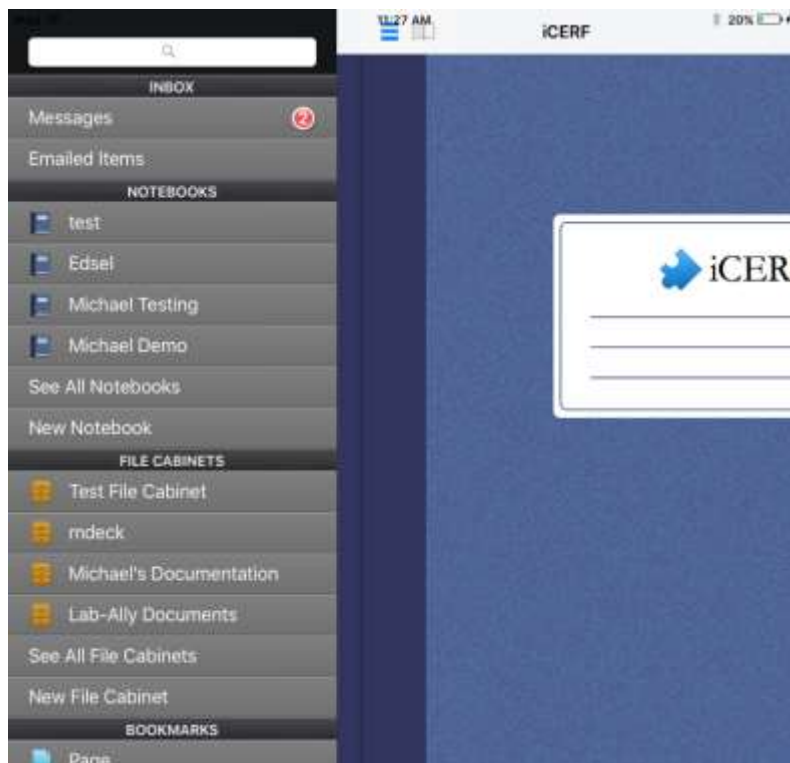

Enter your username, password, and Server Address and Port, then press "Log In"

Don't have access to a CERF server? Contact info@lab-ally.com to learn more about purchasing and deploying a CERF system for your organization!
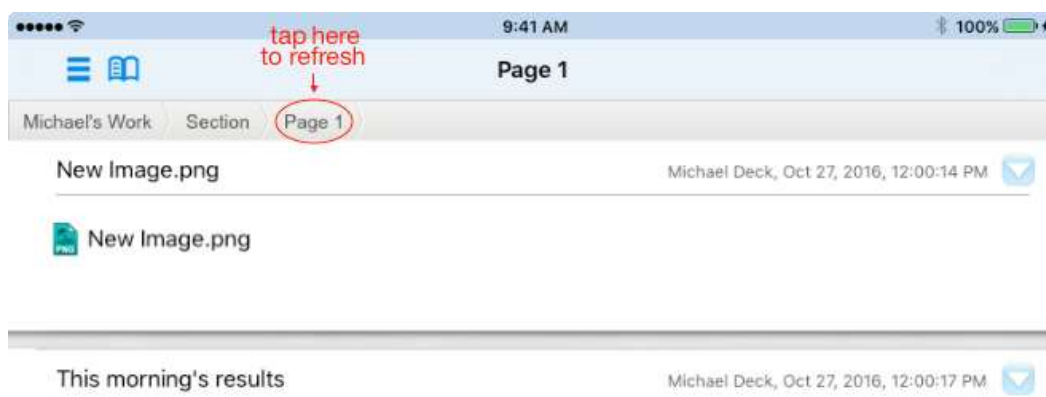
Browsing Collections

Once you have authenticated, you will be taken to your CERF tree, which will display everything that you have access to, including your mounted File Cabinets and Notebooks:

To see the contents of a collection, simply select it and iCERF will display the top level of the collection. You can keep browsing, or if you select a supported file inside the collection (e.g. a Notebook Entry, or a file inside a File Cabinet) the file will be displayed.
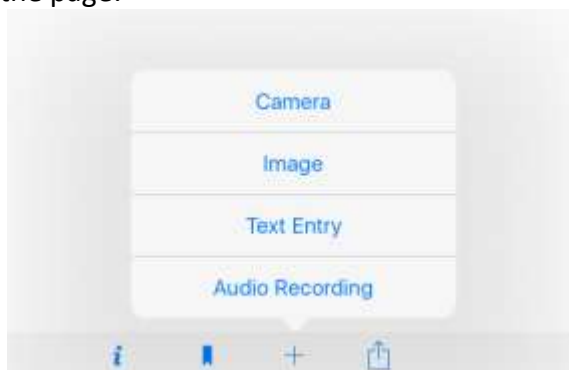
To return to the previous level of your File Cabinet or Notebook, you can use the path bar at the top of the screen, or return to the CERF tree using the menu button at the top-left: ≡

If you've loaded a page or directory and want to refresh the contents, you can click the last item of the path bar as seen in the image below:
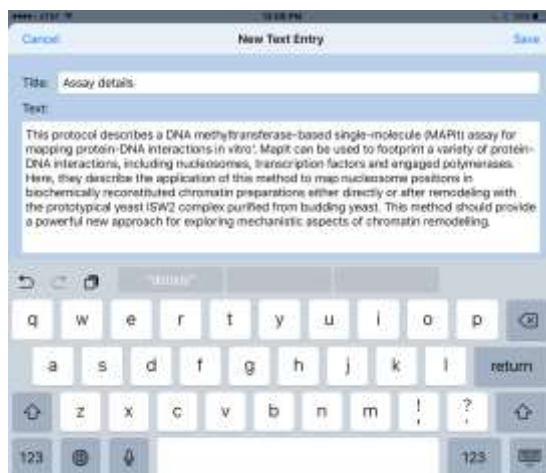
Creating New Entries

If you are browsing on a CERF Notebook Page, you can use the "+" button in the bottom toolbar to add a new entry to the page:

You will be given the option to use your device's camera to take a picture, add an image from your photo album, create a text entry, or create an audio recording.

For example, selecting "Text Entry" will bring up an editor where you can enter a title for the entry and then enter your text:

When you are done entering text, press the "Save" button at the top right of the text entry window to save your entry back to the CERF server.

TIPS:
- If you don't like typing with a standard iPad keyboard, you can try using the WritePad Pro application described below. WritePad Pro works especially well with a stylus!
- iCERF also works with Apple's built-in speech-to-text feature. In testing we have found that this technology even works with laboratory terminology and scientific language. To use, just tap the microphone icon and begin speaking:
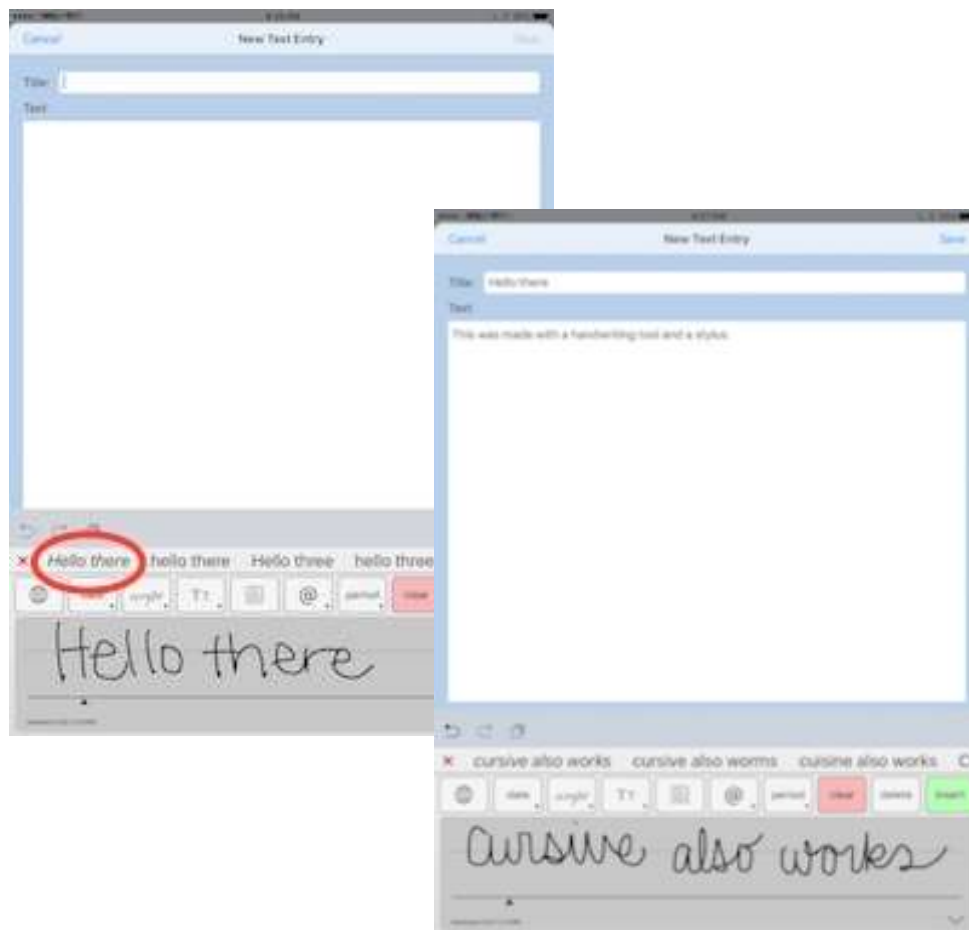
Hand Writing Recognition with WritePad Pro
https://itunes.apple.com/us/app/writepad-pro-word-processor/id797238295?mt=8

WritePad Pro is a keyboard you can add to your iPad that allows you to write, either with your finger or a stylus, directly on your device. Your writing is then automatically converted into text. If you have WritePad Pro installed on your iPad, it can be used for both new entries as well as editing previous entries.

On a notebook page, select "Text Entry" from the list of add options. When the text editor opens, click on the Globe button next to the Spacebar to access your alternate keyboards, then click the "ABC" icon to access the WritePad Pro keyboard.
Once the WritePad Pro keyboard is loaded, you can write in the grey area at the bottom of the screen. As you write, WritePad Pro will recognize your words and convert them into text that can be entered into the text fields above. When you see the correct words in the bar, just tap on them to transfer the words into the text fields and clear the writing area:
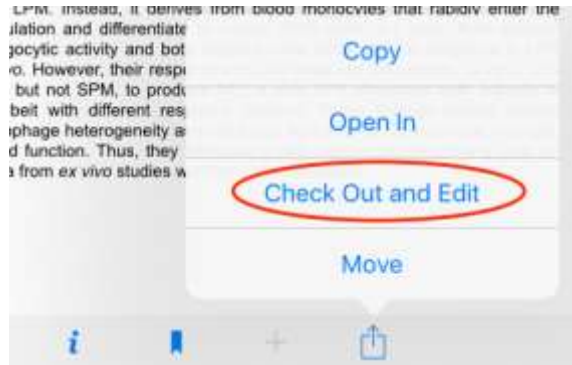

When you're done adding text to your entry, click the "Save" button on the top right corner of the screen.

Editing Entries and Files

If you want to edit a file and you have an appropriate editor on your iPad, you can check-out the file (or entry) for editing just like you would on the desktop version! Almost any app that allows you to save documents to your iPad will work directly with iCERF. Here's an example that uses the app Documents To Go.
https://itunes.apple.com/us/app/docs-to-go-premium/id317107309?mt=8

Select the file you'd like to work with, and then click "Check Out and Edit" to begin editing your file:

After selecting "Check Out and Edit" from the previous menu, you will see several options for exporting your file to an editing app. Click on the icon for DocsToGo:
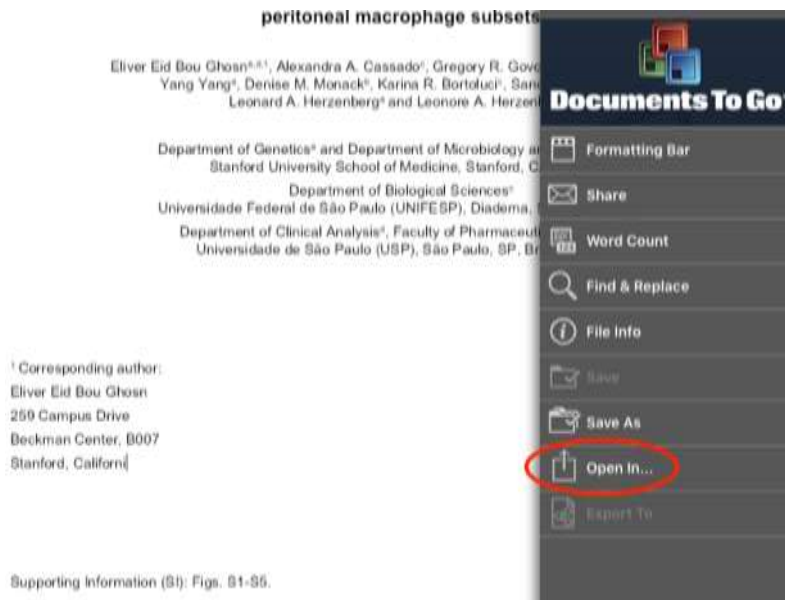

Once you're in DocsToGo you can make any edits that you need. After you're finished, open the side menu bar in the Documents To Go application. You'll see an option for "Save As":

A dialog box will appear on the screen. Enter a name and save location for your file here. Be sure to enter a valid location:
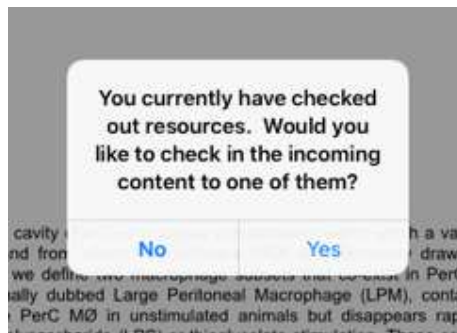

After your file has been saved in Documents to Go, it's time to export your work back to iCERF. Open up the side menu in Documents to Go once more. Click on the "Open In" option to export your file to iCERF:
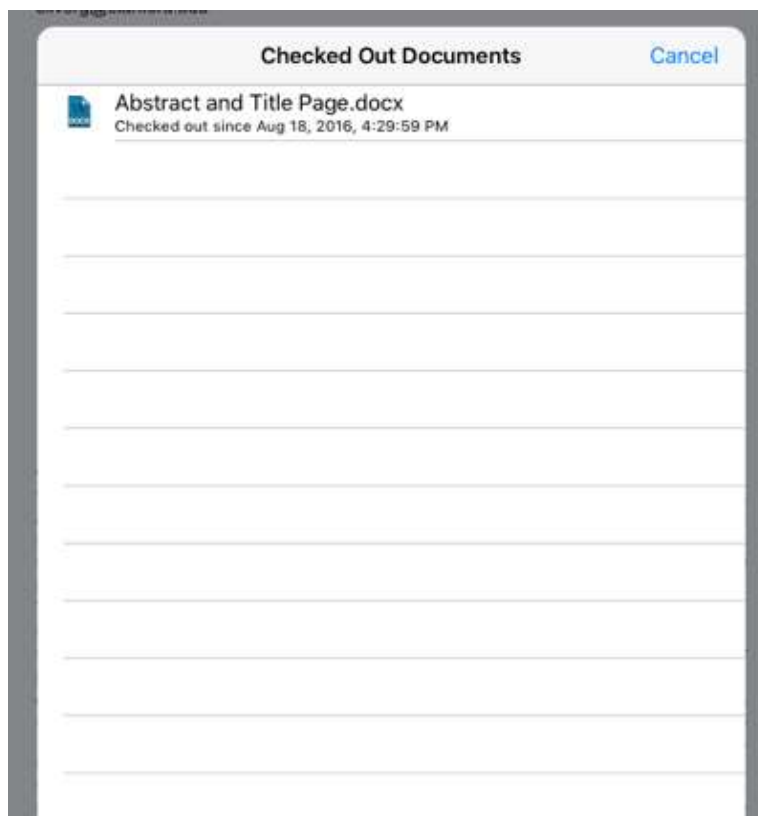
Once you've completed that step, you'll see a list of options to open the file in. Click "Copy to iCERF" to export the file from Documents to Go to iCERF:
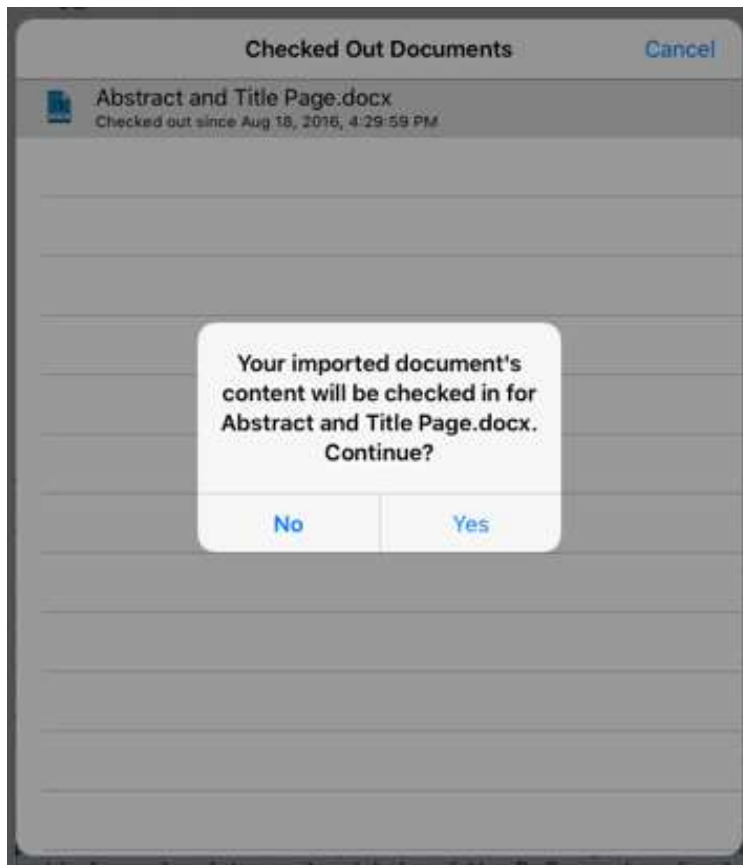

You will then be taken back to iCERF. CERF will notify you have you have checked out resources. Select "Yes" to import the changes you made to your document in Documents to Go to iCERF:
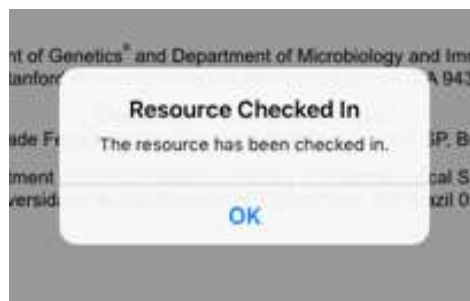

Once you select the "Yes" option on the previous screen, CERF will pull up a list of the resources you currently have checked out. Be sure to click on the resource whose changes you wish to import back to iCERF:

To help prevent the wrong resource being updated or enountering errors, iCERF will ask you to confirm if this is the correct resource to be imported. If this is the proper file, click "Yes". If not, select "No" to choose a different checked out resource:
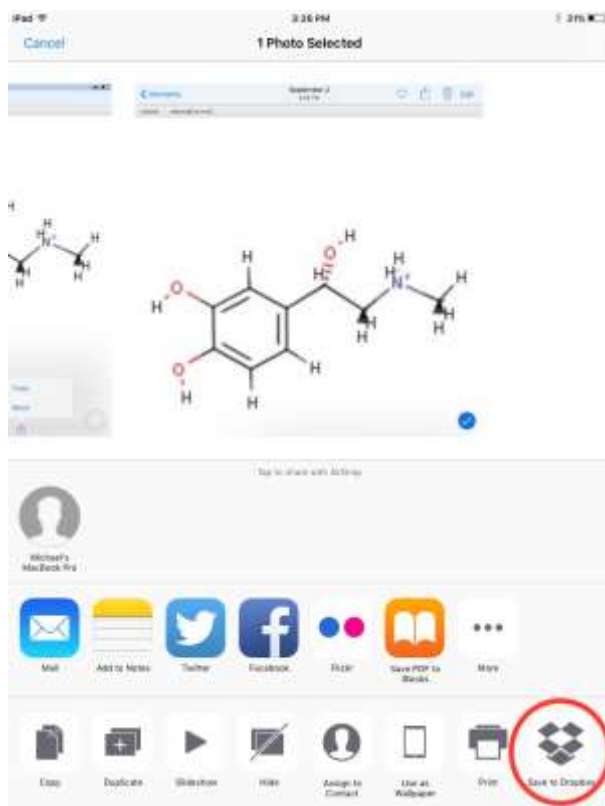

And that's it! Once the resource has been checked back in and your updates saved, you will see this confirmation from iCERF:
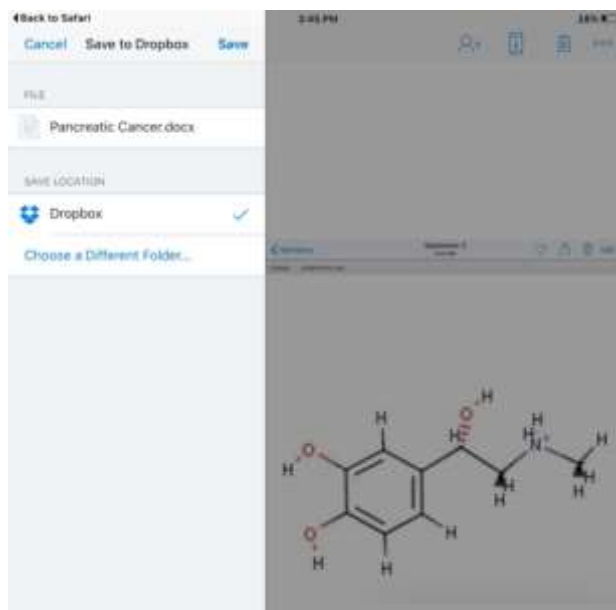

If you're editing CERF data with an app that doesn't have a local save feature and you have Dropbox installed on your iPad, you can save your edited file to Dropbox instead. Then you can copy the new version to from Dropbox into iCERF. Here's how…
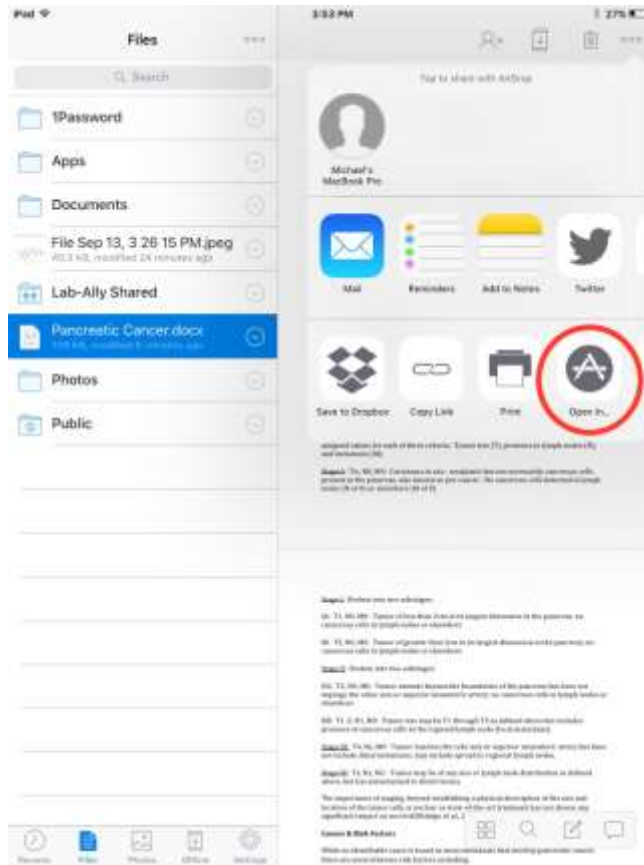
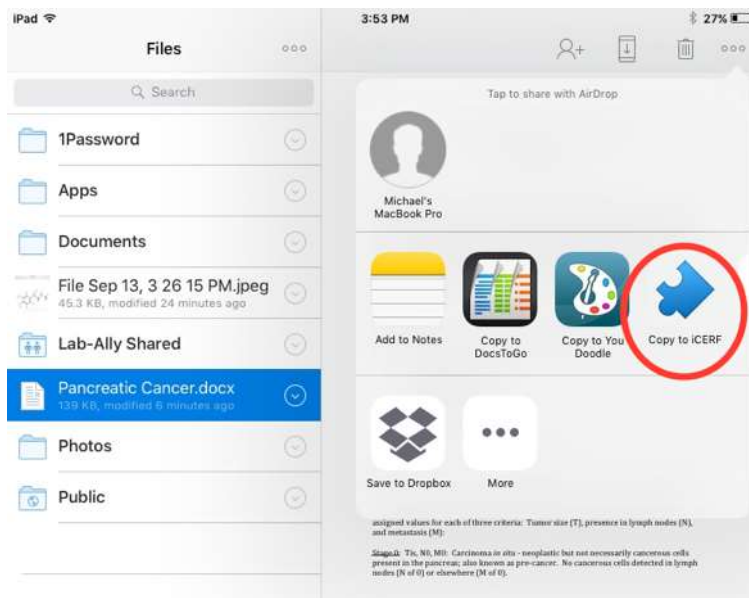When viewing your file, click on the "Save to Dropbox" icon:

A window with the file you selected as well as the save location will appear on the screen.
Ensure that the file is correct, and that you are saving it to Dropbox. If everything is correct, hit
"Save":

Then you can go to your Dropbox app and select the file you just saved. If you do not see iCERF in your list of export options, click on the "Open In" icon:

iCERF will then appear in your list of export options. Select "Copy to iCERF" to export your file:
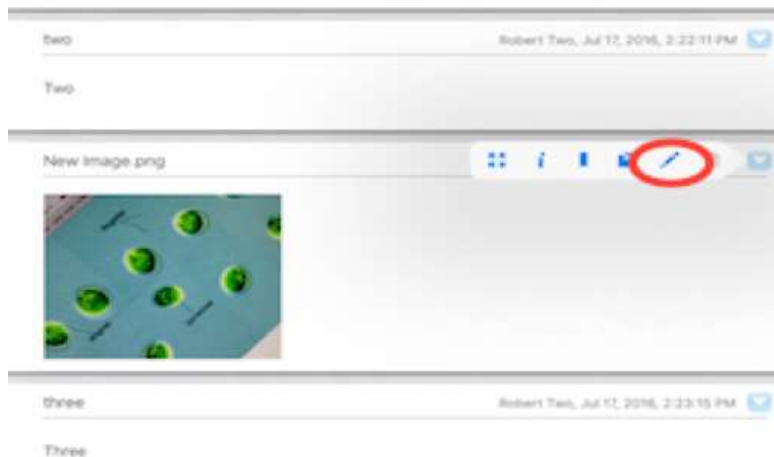
When you open iCERF, you will see a notification confirming that your file was successfully imported. In order to save your file in iCERF, navigate to the location you'd like to keep to save your file to, and paste the resource:
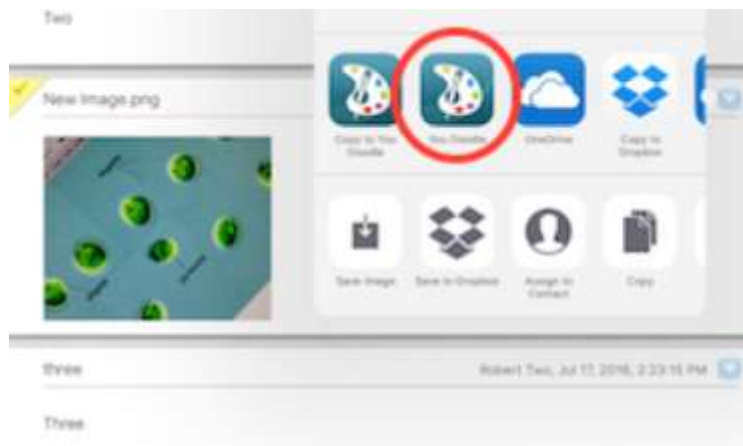
Editing Images with You Doodle

https://itunes.apple.com/us/app/you-doodle-draw-on-photos/id517871755?mt=8
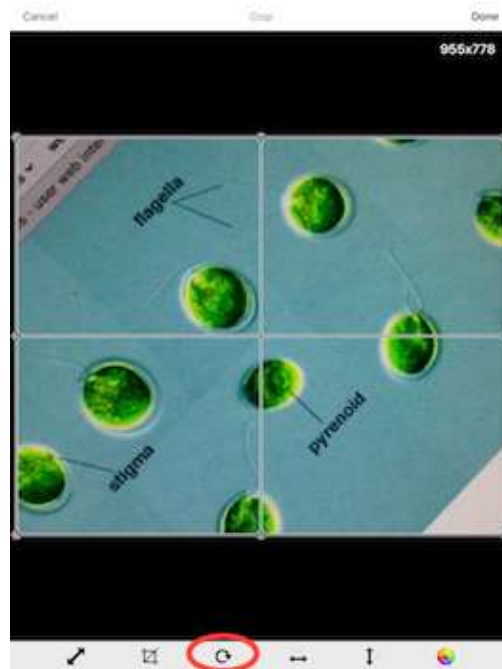
You Doodle is an image editing app. You can use it to rotate and crop images from iCERF.
Click on the pencil icon for the image you want to check out:

After you've checked out the image, click on the drop down menu and select "You Doodle" to
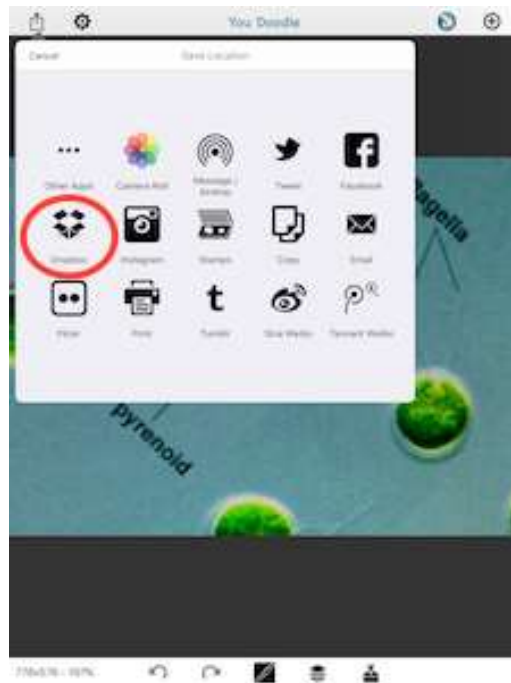open the image in the app:

From You Doodle, you can use the toolbar at the bottom of the screen to edit your image. The circled icon is the rotate option:

When you've finished editing your image, go to the Save menu at the top left corner of the screen and save your file as a PNG:

Now you can go to the export menu and export the image to Dropbox. Follow the earlier steps in this tutorial to use Dropbox to import your image back to iCERF:
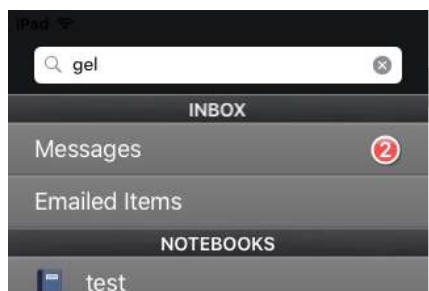

After your image is successfully imported, you will see a confirmation message from iCERF and can access the resource in your notebook.
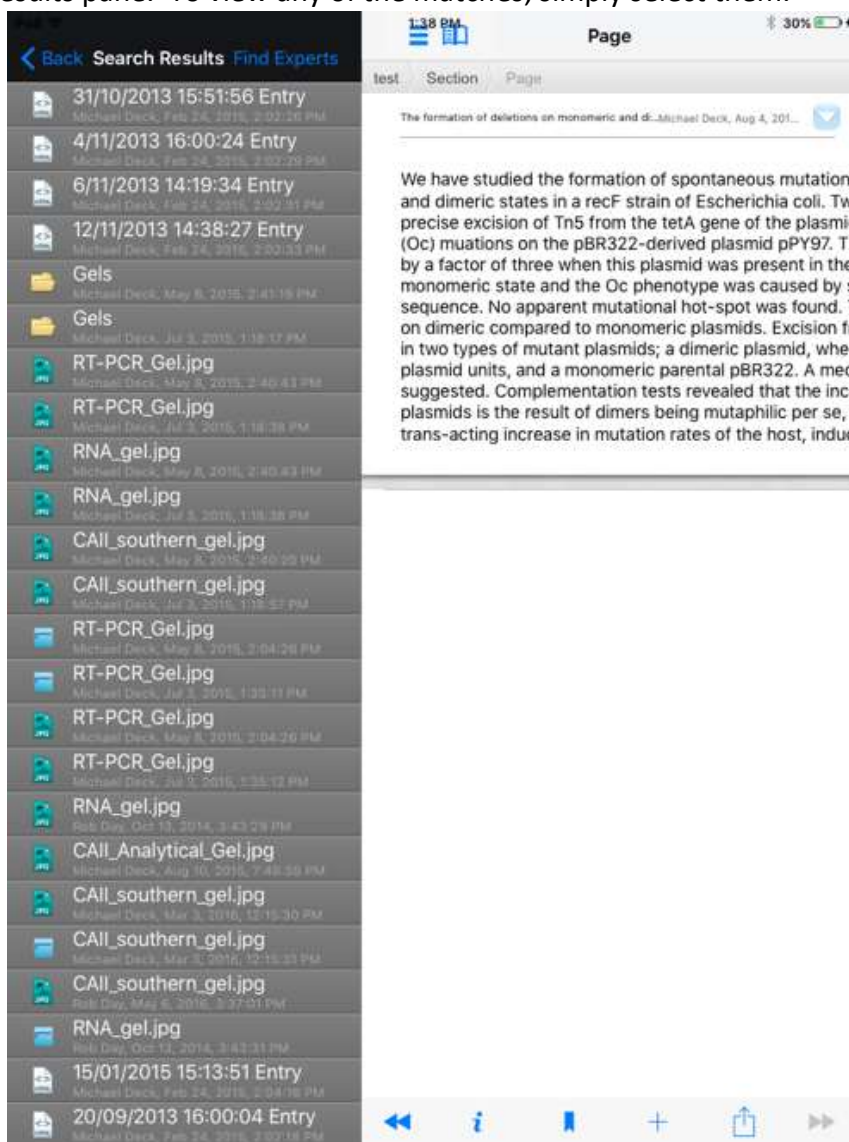
Note: We are not affiliated with Documents To Go, Dropbox, or You Doodle. To see the latest instructions for these apps, be sure to visit their websites!

Searching

In addition to browsing content in your mounted File Cabinets and Notebooks, you can also search the entire CERF server to which you are connected using the SEARCH function. To begin, simply use the search bar located above your collections:

Enter any keywords and press SEARCH; any items matching your keywords will be displayed in the search results pane. To view any of the matches, simply select them.
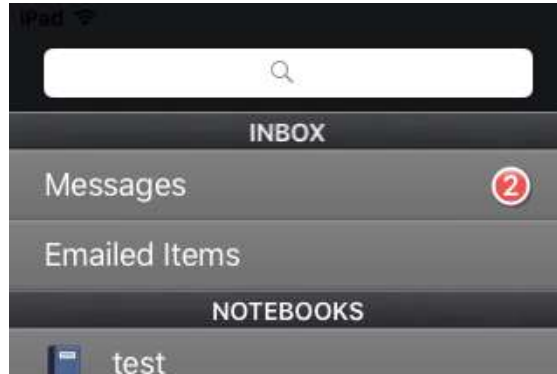
Note that you can use multiple keywords. By default, an OR query is done, which returns all matches for any of the words in your search set.

You will also see a link to the Find Experts feature. This returns a list of contributors who own resources you cannot access that match your search. You are not shown any of the resources, because you do not have permission to view even the titles. But now you can contact a user who may be able to give you the information you are seeking. Click on the "i" for the user's name to send an email asking the user about their resources.
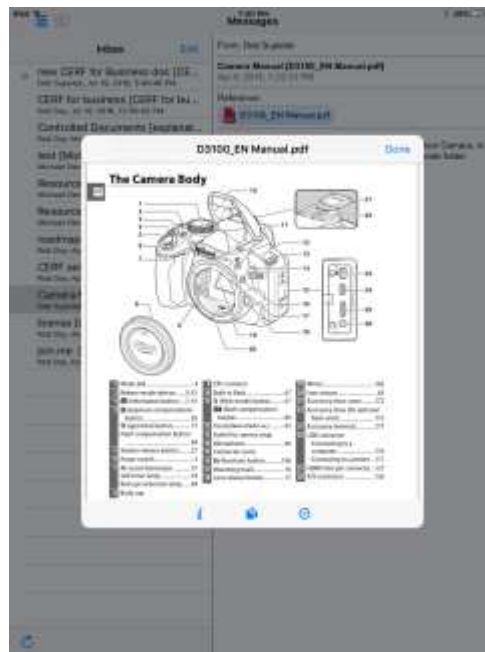
Notifications

The iCERF client also allows you to read any notifications which have been sent to your CERF account. To begin, select "Messages" from the left-hand tree:

To read the contents of a Notification, simply select it. If the Notification contains a Reference Link to an item (e.g. Notebook Page or file), clicking on the attachment in the Notification itself will allow you to view that item.

Note that you cannot delete or reply to notifications from the iCERF client.
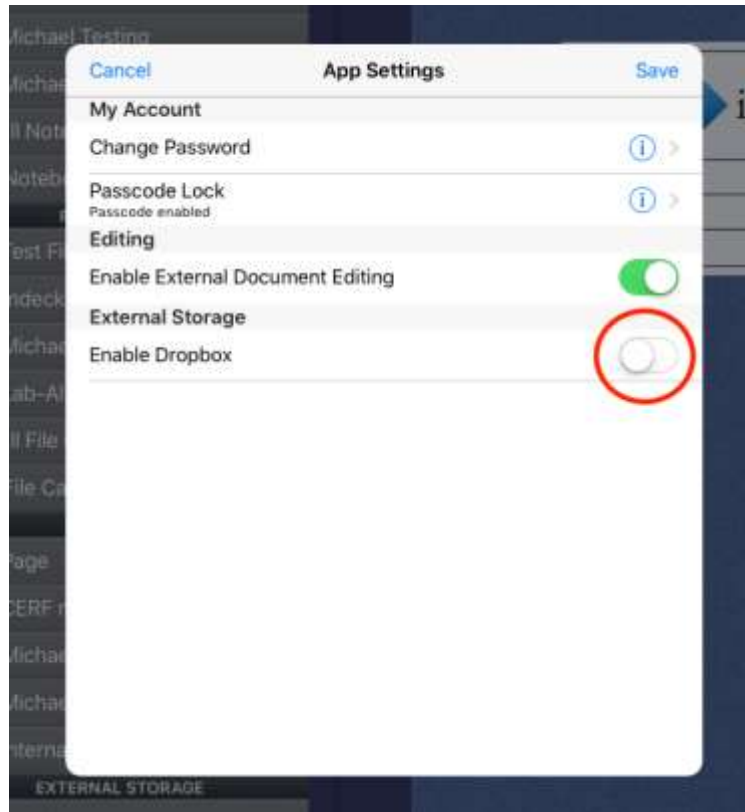
Bookmarks

The iCERF application allows you to access all of your CERF bookmarks just as easily as you can from the Desktop version of CERF:

Navigating bookmarks is just like navigating a File Cabinet or a Notebook... simply select the entry you wish to see. If you are navigating into a Bookmarks Folder, you can back out again using the BACK button at the upper left of the interface.

Dropbox Integration

iCERF can also connect to your own personal Dropbox account. To start using this feature, click Settings > App Settings from the left-hand tree. Just flip the switch to turn on Dropbox.

After clicking save, you will be taken to your Dropbox app on the same device (Dropbox must be installed). After you approve access to your Dropbox, you will see the Dropbox icon in your CERF tree. Selecting this will take you to YOURDROPBOX/Apps/iCERF/. If you'd like to transfer files from Dropbox to CERF, put them in this folder.

When you select Dropbox from your CERF tree, you will be able to view all the files in this Dropbox folder. Clicking a file allows you to view and copy files to be pasted in your CERF collections.

Logging off

When you are finished using the iCERF app, select SETTINGS > Log Out from the bottom of the interface to return to the initial login screen.