



# DocPoint 14 Express

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## Install and Configure

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## Introduction

This guide outlines the steps for first time installation of DocPoint Express.

- Install DocPoint 14 Express.
- Configure the Data Source.
- Configure the basic components of DocPoint.

Once done you can start using DocPoint. (It is very intuitive)

When you need help, click on the  icon on each screen.

Alternatively, you can read the full User Guide.



**“I have some paperwork to catch up. If I’m not back  
in two days, organize a search and rescue team!”**

## Install DocPoint 14 Express

### Requirements

- Operating System: Win 7/8 with .NET 3.5, 4.0, 4.5  
You can download missing .NETs here:  
<http://www.docpoint.biz/tools/>
- MS Office 2010/2013
- You must have full administrative rights on the computer.

### Installation

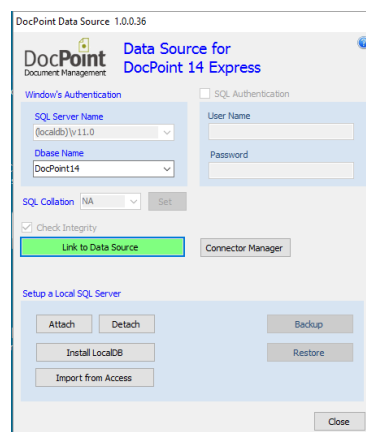
- You can try DocPoint 14 Express for 21 days before you purchase.  
Download the installation file.  
[http://www.docpoint.biz/ftp/docpoint14/free/DocPointExpress\\_trial.exe](http://www.docpoint.biz/ftp/docpoint14/free/DocPointExpress_trial.exe)
- If you have already purchased DocPoint express 14, download the installation file. The User Name and Password will be sent to you after you made a purchase.  
<http://www.docpoint.biz/ftp/docpoint14/clients/DocPointExpress.exe>
- Run the installation file and follow the on screen instructions.

Once the process completes successfully the **Data Source** screen opens.

Alternatively, you can start it by clicking on  icon on your desktop.

## How to connect DocPoint 14 Express to the local Data Source

Click on the **DocPoint Data Source** icon  on your desktop.



The **SQL Server Name** should be **(localdb)\v11.0**. This name is set by the system and you cannot change it.

- Select the name of the dbase (**DocPoint14**) from the list in the **Dbase Name**.  
If the list is empty press on the **Attach** button and select this file **DocPoint.MDF** and press **Open**. (If you get an error message, press the **Detach** button and then the **Attach** button again)  
DocPoint14 will appear in the **Dbase Name** list.
- Check the **Check Integrity** checkbox to fix the database.
- Press the **Link to Data Source** button.
- Press the **Connector Manager** to fine tune the Office connectors.
- If your User Interface language is not English select the appropriate language from SQL Collation list and press the **Set** button.
- Read this manual:  
[http://www.docpoint.biz/ftp/docpoint14/docs/Install and configure DocPoint 14 Express.PDF](http://www.docpoint.biz/ftp/docpoint14/docs/Install%20and%20configure%20DocPoint%2014%20Express.PDF)
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### Troubleshoot

If you get this error message: **Install the LocalDB** then press the **Install LocalDB** button.

If the error message persists you should upgrade your .NET version.

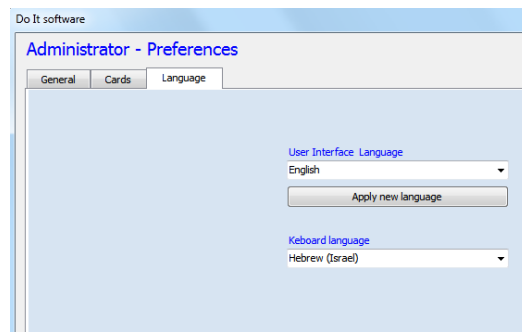
- Close all programs on your computer.
- Download this file and run it.  
<http://www.docpoint.biz/ftp/docpoint14/net4/NDP40-KB2544514-x86-x64.exe>
- Run the **Data Source** program again.

## Configure DocPoint 14

Start DocPoint by pressing this icon  on the desktop.

### Set User Interface language

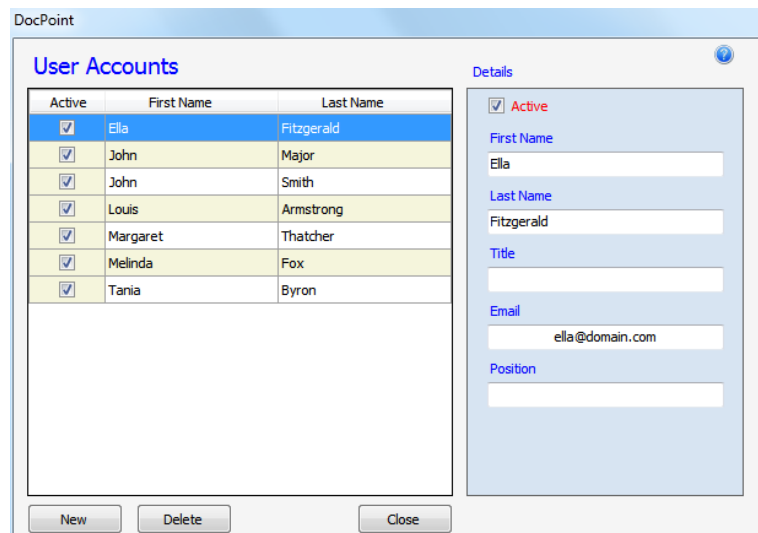
Select from the menu **Tools>Preferences**



- Select the **Language** tab.
- Set the User interface and keyboard language.
- Press the **Apply new language** button.

### User Accounts

Select from the menu **Tools>User Accounts**



#### Create a new user

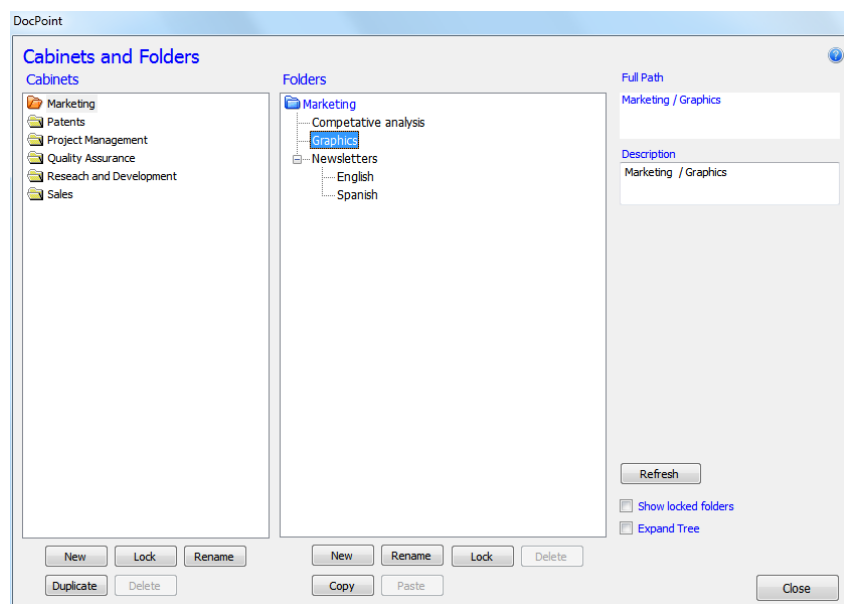
- Press the **New** button.
- Type the details of the new user.
  - The user status is by default **Active**. A user is usually made Inactive when he leaves the organization.

## Delete a user

- Select the user and press the **Delete** button. A user who is associated with documents cannot be deleted.

## Cabinets and Folders

Select from the menu **Tools>Cabinets and Folders**



DocPoint has a flexible filing structure that adapts to the way you store information. DocPoint's filing structure is based on a hierarchical cabinet/folders principle - cabinets that include many folders. For example, a 'Marketing' cabinet can contain three folders, 'Brochures', 'Competitive Analysis,' and 'Newsletters'. Each folder can contain more subfolders. This filing method is widely used in paper-based offices, and can be quickly mirrored into DocPoint, presenting you with a true paper-less office.

### Cabinets

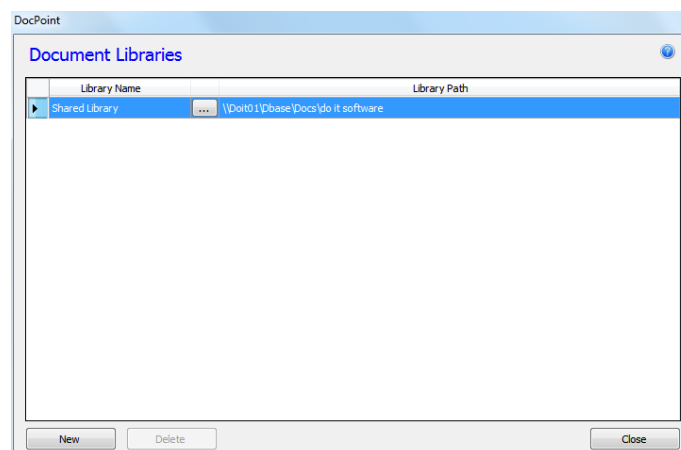
- To create a new Cabinet, press the **New** button.
- To Lock a Cabinet, select a Cabinet and press the **Lock** button.  
This action will make the Cabinet and its Folders unavailable for new documents.  
The Folders are available for search only.
- To rename, select a Cabinet, press the **Rename** button and edit the Cabinet name.
- To duplicate a Cabinet, select a Cabinet and press the **Duplicate** button.
- To delete a Cabinet, press the **Delete** button. A Cabinet containing documents cannot be deleted.

## Folders


- To create a new Folder, select the Cabinet or Folder under which the new folder will be created and press the **New** button.
- To Lock a Folder, select a Folder and press the **Lock** button.  
This action will make the Folder and its Subfolders unavailable for new documents.  
The Folders are available for search only.
- To rename, select a Folder, press the **Rename** button and edit the Folder name.
- To copy a Folder, select a Folder and press the **Copy** button.  
Select the Folder into which to copy the Folder and press the **Paste** button.  
This action copies the structure of the Folder and its Subfolders to the new location.
- To delete a Folder, press the **Delete** button. A Folder containing documents cannot be deleted.

## Document Libraries

Select from the menu **Tools>Document Libraries**



DocPoint saves your documents in Libraries. Libraries have everyday names, such as "Personal Finance" or "2013 Tax Returns". Working with Library names instead of folder paths can be useful:

- Users can save documents only in predefined libraries regardless of the logical cabinet or folder assigned to the document.
- Users can save documents in libraries with meaningful names, such as "Product Brochures", without knowing that the physical path is *x:/documents/marketing/products/brochures*.
- You can change the physical address of a library without changing the library name.
- To create a new Library, press the **New** button.
- To edit the library's path press on the  button.



- To delete a Library press the **Delete** button. A Library containing documents cannot be deleted.

## Start using DocPoint 14

Once you have configured the basics of DocPoint you can start using it.

You can get help by pressing the  icon in the top right corner of each screen.

## The Main Menu

- New Document - opens a Card to create a new document.
- Search Folders - opens the search screen in which you can retrieve documents.
- Favorites - opens the Favorite Folders and documents quick retrieval screens.
- Tools - contains all the management tools of DocPoint.
  - User Accounts
  - Cabinets and Folders
  - Contacts
  - Keywords
  - Similar Words
  - Classifications
  - Document Libraries
  - Document Templates
  - Import
  - Preferences