



DocPoint 14 Quick Start Guide

How to deploy DocPoint 14 in your organization

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Do It Software Ltd

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Introduction

This guide outlines the steps for first time installation of DocPoint in an organization.

- Install a SQL server. (If you do not have one already)
- Attach a blank DocPoint database to the SQL server.
- 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!”**

DocPoint and SQL server

This section contains instructions detailing:

- How to attach a blank DocPoint database to Microsoft SQL Server.
- How to connect DocPoint running on a client PC to the SQL server.

Requirements

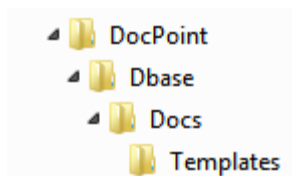
- Microsoft SQL Server. (You may use the Express edition: a free, easy-to-use, lightweight version of SQL Server).
- Microsoft SQL Management Studio.

You can download Microsoft SQL Server Express 2012 here:

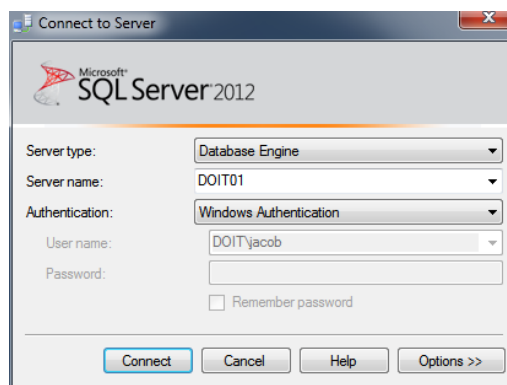
<https://www.microsoft.com/betaexperience/pd/SQLEXPNOCTAV2/enus/default.aspx>

How to attach a blank DocPoint DATABASE to the SQL server

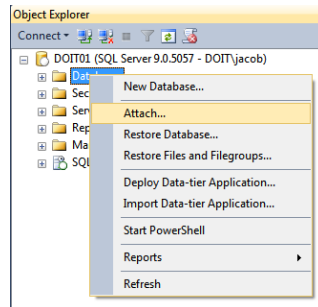
- Create the following directory structure on the SQL server:



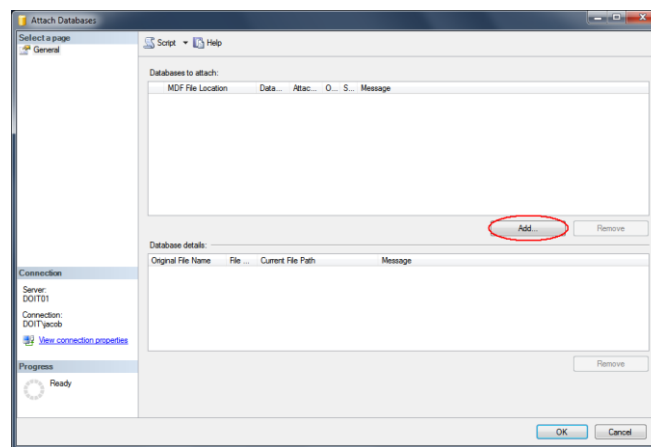
- Download the SQL database from <http://www.docpoint.biz/ftp/docpoint14/sql/DocPoint.zip>
- Extract the content of the zip file to a temporary directory. After extraction you should find two files: **DocPoint.mdf** and **DocPoint.ldf**. Copy them to the **DocPoint\Dbase** directory.
- Start the Microsoft SQL Management Studio and connect to the SQL Server.



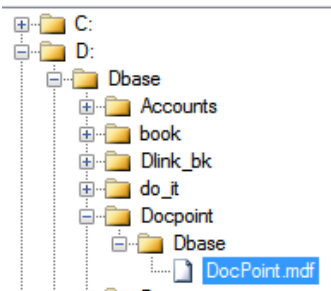
- Right-click on **Databases** and select **Attach...**



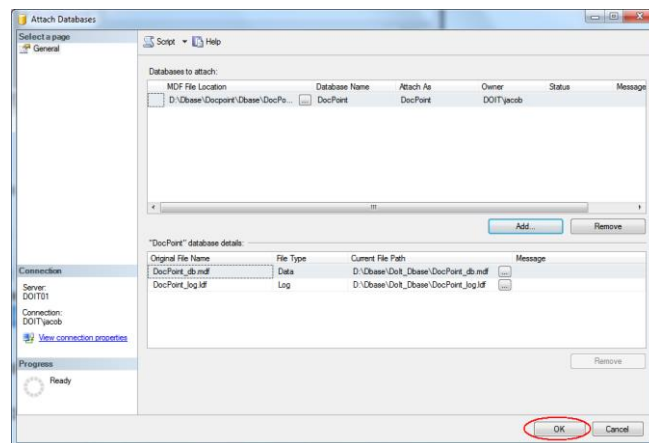
- Click **Add...** in the **Attach Database** window.



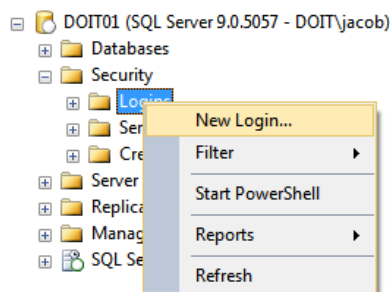
- Select **DocPoint.mdf** and press **OK**.



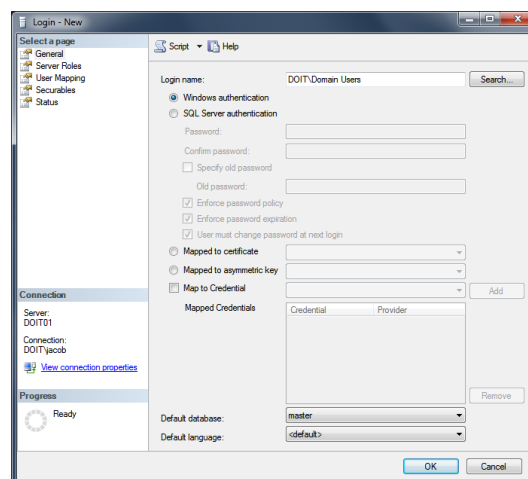
- The **Attach Database** window should display the database you selected.



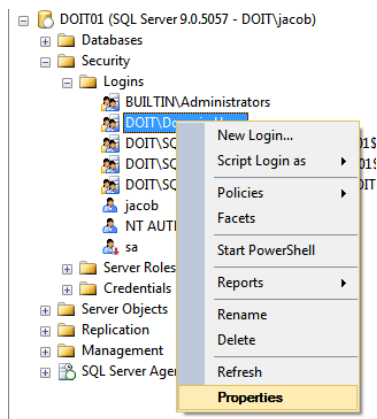
- Press the **OK** button to continue.
- Select the **Security** and right-click on **Logins** and select **New Login**.



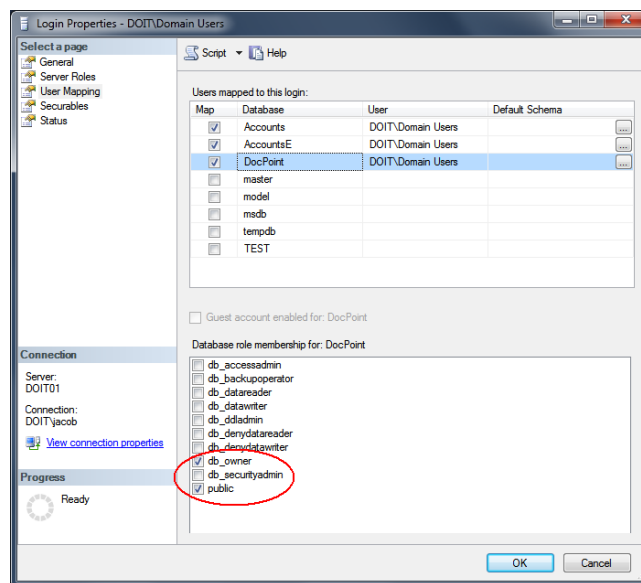
- Select a group, user, or users that you want to grant permission to DocPoint. We recommend that you select the **Domain Users** group by doing the following:
In the **Login name** field type '<your domain name>\DomainUsers'.



- Click **OK**.
- Right-click the group you just added (in the example above the group is called **Domain Users**), and select **Properties**.



- In the **Properties** screen select **User Mapping** and set the following:
 - In the **Database** column, check **DocPoint**
 - In the lower half of the screen (titled **Database role membership for: DocPoint**) check **db_owner**.

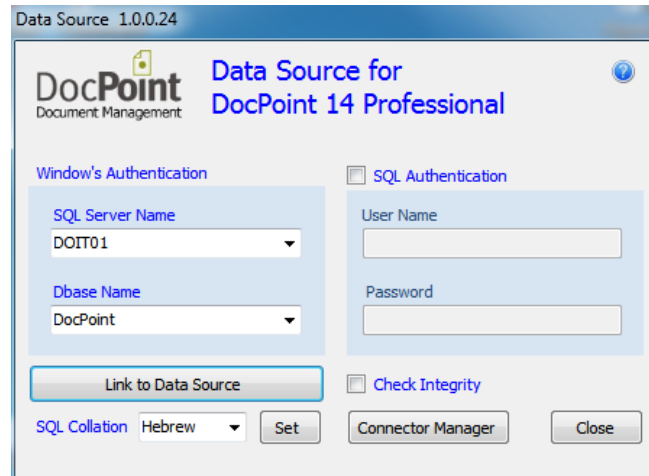


- Click **OK**.

How to connect DocPoint running on a client PC to the SQL server

Perform the following from any PC in the LAN:

- Install DocPoint on the PC.
- Click on the **DocPoint Data Source** icon  on your desktop.



1. Select the SQL server to connect to from the list in **SQL Server Name**.
2. Select the name of the database (Usually DocPoint) from the list in the **Dbase Name**.
3. In some cases the lists of servers and databases (steps 1 and 2) are empty. In this case type manually the name of the SQL instance and the name of the database.
4. Check the **Check Integrity** checkbox to fix the database.
5. If the SQL Server needs Authentication check the **SQL Authentication** check box and fill in the User Name and his Password.
6. Press the **Link to Data Source** button.
7. Press the **Connector Manager** to fine tune the Office connectors.

Configure DocPoint

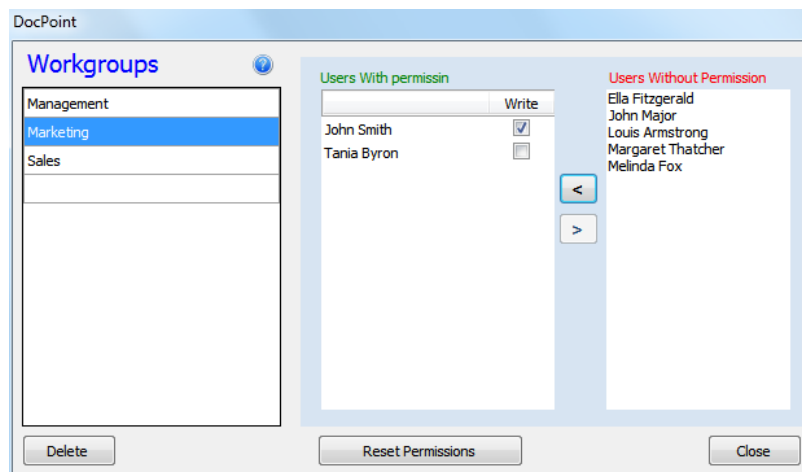
You must log on to DocPoint as Administrator. (The first time password is: **docpoint**)

Workgroups (DocPoint Corporate edition only)

A group of one or more users can form a workgroup. A workgroup consists of a team of people engaged in a cooperative task, or any group of people working toward a common goal as a team.

DocPoint allows workgroup members to collaborate on a specific project or function, make use of a common document and filing database, and update or delegate document reminders related to that project or function. An enterprise will typically have a number of workgroups involved in a product development project.

Select from the menu **Tools>Workgroups**



Creating a new Workgroup

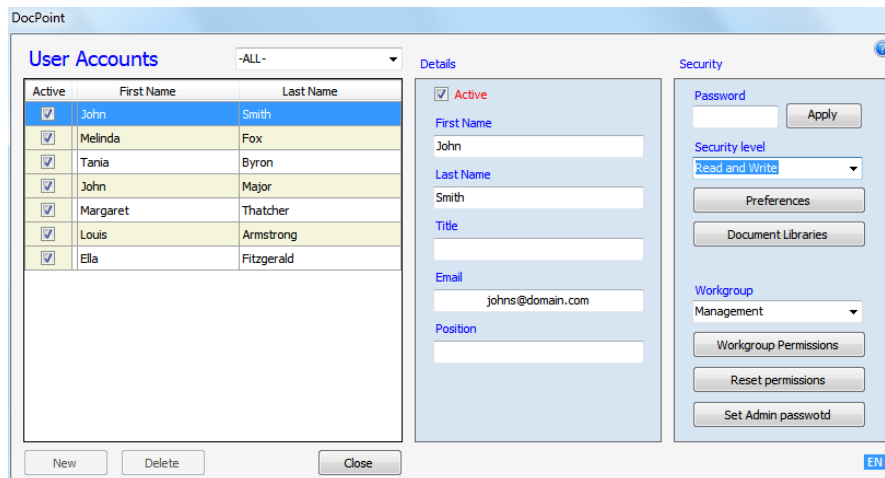
- Type the name of the new workgroup in the empty row at the bottom of the list.
- Assign permission to users from other workgroups by pressing the button.
- To complete press the **Reset Permissions** button.

Deleting a Workgroup

- Select the Workgroup.
- Make sure the Workgroup has no members or users with permission.
- Press the **Delete** button.
- To complete, press the **Reset Permissions** 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**. An Inactive user cannot log to DocPoint. A user is usually made Inactive when he leaves the organization.
 - Type a password and click **Apply**.
 - Select the **Security Level** for the use.
 - Press the **Preferences** button to set the user's preferences.
 - Press the **Document Libraries** button to assign the user's permission to Libraries.

Delete a user

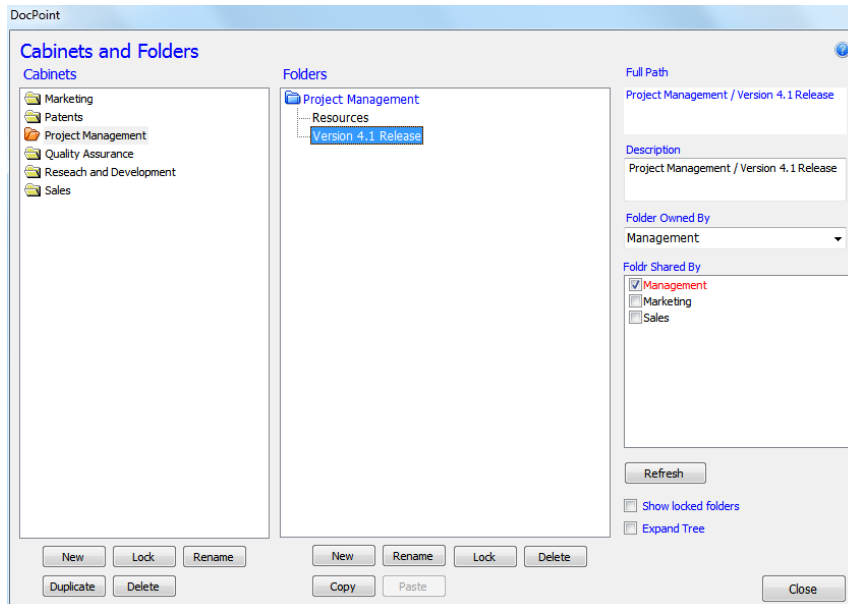
- Select the user and press the Delete button. A user who is associated with documents cannot be deleted.

Workgroups (DocPoint Corp edition)

- Select the user's **Workgroup**.
- Press the **Workgroup Permissions** to assign, if necessary, permissions to other workgroups.
- Press the **Reset Permissions** button.

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.

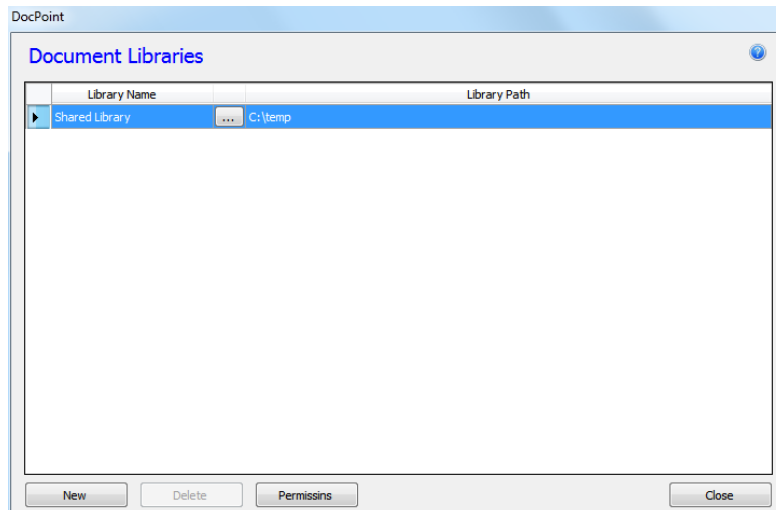
- To Lock a Folder, select a Folder and press the **Lock** button.
This action will make the Folder and its Subfolders unavailable for new documents.
The Folders are available for search only.
- To rename, select a Folder, press the **Rename** button and edit the Folder name.
- To copy a Folder, select 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.

Workgroups and sharing Folders (Corporate edition only)

- Select the Workgroup that owns the Folder.
- The Folder can be shared by other Workgroups. Check the Workgroups that are allowed to share this Folder.

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*.

- The system administrator can change the physical address of a library without changing the library name.

In a multi-user deployment only the built-in library called 'Shared Library' is available to all users.

Other libraries are not available to other users unless granted permission.

- 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.
- To set access permission, press the **Permissions** button.

Deploy DocPoint in the organization

- Log on the client computer with the user's credentials.
- The user must have administrative permission to the local computer.
- Install DocPoint on the client computer.
- Connect to the SQL server using the **DocPoint Data Source** tool.