

DocPoint 14

User Manual

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DocPoint 14 Overview

DocPoint is a document management program, which grows with the organization. DocPoint comes in these editions:

- **Express** for a single user on a single computer.
- **Professional** for several users in one workgroup where the database is installed on a server.
- **Corporate** for several users in several workgroups where the database is installed on a server.
- Reader for users who only search and retrieve documents.
- **Free** like the Express edition with a limit of 500 documents. When this limit is reached this edition is converted to the Reader edition.

Doc**Point** manages documents by these three profiles:

- Incoming mail
- Outgoing mail
- Internal documents

Each document has a Card containing its metadata.

Start using DocPoint

Before you start using DocPoint you have to define these parameters:

• <u>Workgroups</u> (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.

User Accounts

Fill in the details of each user of DocPoint.

In the Professional and Corporate editions you must define the security level of the user and assign him a password.

There is a built in Administrator who has full control on the system. The Administrator creates users and assigns them permissions.

DocPoint supports these security levels for a user:

- Read the user is allowed to retrieve documents and read them only.
- Write the user is allowed to retrieve documents and edit them.

Administrator - the user is allowed to retrieve documents and edit them and manage all tools.

<u>Cabinets and Folders</u>

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.

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:



The Main Menu

- <u>New Document</u> opens a Card to create a new document.
- <u>Search Folders</u> opens the search screen in which you can retrieve documents.
- <u>Favorites</u> opens the Favorite Folders and documents quick retrieval screens.
- <u>Tools</u> contains all the management tools of DocPoint.

WorkgroupsUser AccountsCabinets and FoldersContactsKeywordsSimilar WordsClassificationsDocument LibrariesDocument TemplatesImportPreferences



Create a new document

Each document has a Card which contains all the metadata of the document. So the first step is to fill in these data in a new card. Next you can add an existing file, scan a paper document or create a new MS Office document.

A Card can contain several related documents (e.g. a cover letter and related drawing or pictures)

Once a Card is created a unique *Serial Number* is automatically assigned to it.

Incoming letter Card

	Do	ocPoint			
Incoming Mail Card				Serial Number	7
Document date Received on 29/07/2013 • Viriter 07/08/2013			Archive >	Care of Louis Armstrong	From date 14/07/2014
Virter DocPoint Support Subject DocPoint and Microsoft Office Integration Folder Patents / Provisional Applications Patents / Provisional Applications Keywords Azure, Crimson Reference		Ella Fitzgerald John Major John Smith Louis Armstrong Margaret Thatcher Melinda Fox Tania Byron	>	Contact list Name Archived Louis Armstrong Byron Tania	Date 14/07/2014 14/07/2014 02/08/2007 02/08/2007
Email Undassified Notes share note Document library Shared Library	~			Add	Send Alert
		<u></u>	- 🕒 🍃	🔁	0

Create a new Card

- Select from menu *New Document > In* or press the 🛅 button from an open card.
- Type the name of the *Writer* or select from the dropdown list if this writer has sent mail in the past.
- Modify the *Document date* or *Received on* date if necessary.
- Type a description of the document in the *Subject* text box.
- <u>Press the _ button</u> next to the *Folder* text box to select the Folder/s the Card is assigned to.
- Press the button next to the Keywords text box to assign keywords to the Card. (optional)
- Type the *Reference* of the received letter.
- Select *Classification* from the dropdown list. (optional)
- Select from the dropdown list the *Document Library* in which to save the document.
- Press the 🖉 button to attach an existing files to the Card.
- <u>Press the button</u> to scan the paper documents.

More functions

- Open the document/s linked to the Card.
- Manage versions.
- <u>Create outlook task and send alerts.</u>
- Email linked document/s.
- 📓 Delete all documents linked to the Card.
- Olose the Card.

An incoming letter must be distributed and dealt with.

- Select from the *User list* those who need to see the letter and press the button.
- From those in the *Distribution list* double click on the one who has to deal with the letter.



Outgoing letter Card

	DocPoint	
utgoing Letter Card		Serial Number 9
Writer	Document date	Addressee Contacts Contact groups
Melinda Fox	✓ 17/08/2007	
Subject		Euli Name
Change of address note		Tony Wolfman
Folder		Address
Sales / Customers		46 Wembley Hill Rd.
Sales / Customers		Wembley
Keywords		Middx
Reference	Classification	
Sales / Customers / 9		Email
	ondassined	tony@wolfman.co.il
Notes		
Template type Template n		
Standard letters 🗸 Standard L	etter 🗸	
Document library		
Shared Library	~	Create addressee list
-		
🔍 🔛 🔽 🧷		

Create a new Card

- Select from menu *New Document > Out* or press the 🖺 button from an open card.
- Select the *Writer* from the dropdown list.
- Type a description of the document in the *Subject* text box.
- <u>Press the _ button</u> next to the *Folder* text box to select the Folder/s the Card is assigned to.
- Press the button next to the Keywords text box to assign keywords to the Card. (optional)
- Type the *Reference* of the Card if not automatically set.
- Select *Classification* from the dropdown list. (optional)
- Select from the dropdown list the *Document Library* in which to save the document.
- You have to assign an addressee or addressees for the letter.
 On the *Addressee* tab you can type the details of the addressee.
- You can choose the addressee from the contact list.
 Select the *Contacts* tab and double click on the one to add or press the *Add* button.
- You can add several addressees.
 Check the *Create addressees' list* check box.
 Add from the *Contacts* tab or from the *Contact* groups tab.

Create a Word document

- Select the *Template* for the document.
- Press the 💹 button to create a new Word document.

Add other documents

- Press the 🖉 button to attach existing files to the Card.
- <u>Press the button</u> to scan paper documents.

More functions

- Open the document/s linked to the Card.
- Manage versions.
- Create outlook task and send alerts.
- Email linked document/s.
- 📓 Delete all documents linked to the Card.
- Olose the Card.



Internal Document Card

	DocPoint		
Internal Document Card	2	Serial Number 5	
Writer		Document d	ate
John Smith	¥	05/08/2013	
Subject			
DocPoint User Manual			
Folder			
Sales / Brochures			
Sales - Demo etc			
Keywords			
Farce, Azure			
Reference	Clas	ssification	
Sales / Brochures / 5	Unc	lassified	~
Notes			
Template type	Template name		
-ALL- 🗸	-Blank Page (No templat	æ)-	¥
Document library			
Shared Library			¥
	/ > 🔇	🗗 🏷 🖾	٨

Create a new Card

- Select from menu *New Document > Internal* or press the 🖺 button from an open card.
- Select the *Writer* from the dropdown list.
- Type a description of the document in the *Subject* text box.
- <u>Press the _ button</u> next to the *Folder* text box to select the Folder/s the Card is assigned to.
- Press the _ button next to the Keywords text box to assign keywords to the Card. (optional)
- Type the *Reference* of the Card if not automatically set.
- Select *Classification* from the dropdown list. (optional)
- Select from the dropdown list the *Document Library* in which to save the document.

Create an Office document

- Select the *Template* for the document.
- Press the 🖾 button to open a new Excel worksheet.
- Press the 🔟 button to open a new Word document.
- Press the 💷 button to open a new PowerPoint presentation.

Add other documents

- Press the 🖉 button to attach an existing files to the Card.
- <u>Press the button</u> to scan the paper documents.

More functions

- Open the document/s linked to the Card.
- Manage versions.
- Create outlook task and send alerts.
- Email linked document/s.
- 📓 Delete all documents linked to the Card.
- Olose the Card.



Card Functions

Select a Folder

	DocPoint		
Select a Cabinet	Select a Folder	Main Folder	(
Marketing Patents Vroject Hanagement Quality Assurance Research and Development States	- Sales - Solor Uncers - Presentations	Sales / Brochures File in additional folder	
Cancel	Expand tree Sales - Demo etc		Close

DocPoint assigns a Card to Folders. A Card must, at least, be assigned to the Main Folder. You can assign a Card to more Folders. This feature allows more flexibility when you search for a document. Assign to Main Folder

- Select a *Cabinet*.
- Select a *Folder*.
- Double click or press the 🖻 button next to *Main Folder* text box.
- Assign to more Folders
 - Select a *Cabinet*.
 - Select a *Folder*.
 - Press the 🖻 button next to *More Folders* list.
 - You can repeat this process to assign the Card to as many Folders you need.
- Remove from more Folders list
 - Select the folder/s to be removed.
 - Press the < button next to *More Folders* list.

D	ocPoin	it	
Document keywords			0
Document keywords Select a category Colors Search Keywords Amber Aqua Beige Blue Crimson Emerald Gold Violet White	>	Document keywords Azure Farce	•
			Close

Add keyword to document

- Select a category.
- You may search in the list by typing the first letters of the keyword
- Select the Keyword to add and double click on it or press the ≥ button.



• You can add several keywords to a card. (e.g. 'Payment', 'HSBC')

Remove keyword from document

- Select the keyword.
- Press the subtraction or double click

Note

The selection screen opens by default with built in *My Keywords* category.

This category contains the keywords you frequently use.

To remove a keyword from this category, select the keyword and press the *Remove* button.

Scan a new Document

	U	ocPoint	
Scanning			6
Pixel type Black & White - 1 Bit v Page size - mm A4 Profile v Hight Width 297 210	Resolution 200 v Rotation - deg		
Duplex scanning PDF format Stamp CR English Sign Digitally	Automatic document feeder 500 after pages 30 Open user interface invert		
< Type name of new scan >			
Canon P-150 TWAIN			
Select Scanner	S	tart Scanning	Close

You can scan paper documents directly into DocPoint. DocPoint supports the *tiff* and *pdf* multipage formats.

By default, DocPoint scans to *tiff* format. When scanning to *tiff* format you are able to merge more scanned pages to an existing file. Scanning to *pdf* format does support merging.

- When scanning for the first time, press the *Select Scanner* button to select which scanner to use. The name of the scanner appears above this button.
- Select your scanner and press the *Select* button.

Configure scanning parameters:

- *Pixel type* Black and White is suitable for most common office papers.
- **Resolution** 200 DPI is suitable for black and white scans. For OCR, 300 DPI is recommended.
- **Page size** Select the size of the paper you are about to scan. You can select a custom size and set its width and height. Disable the
- **Automatic document** feeder DocPoint supports scanners with an Automatic Document Feeder (ADF). Select this check box to scan multiple pages using the document feeder. Specify the maximum number of pages to scan in the **Pages** field.
- **Duplex scanning** DocPoint supports Duplex scanners. Select this check box to perform Duplex scans that scan both sides of the page. (if supported by your scanner)
- **PDF format** Scan pages to **pdf** format.
 - Add time stamp Add a time stamp to the scanned image.
 - OCR Select this check box and select the main language of the scanned document.
 - Sign Digitally You can digitally sign the PDF scanned document. You need to purchase a digital signature from <u>CoSign</u>.
- **Open user interface** You can use the scanner's interface to make use of scanner specific features.



- *Invert* Scan images in inverted color.
- Append to an existing tiff scan When using the tiff format you can scan documents and add them to existing files. Images are appended to the end of the existing file. If the document card is associated with more than one image, select the image you want to add the scan to from the file list below the 'Start Scanning' button.
- You can give the scanned image a name if you are scanning a paper document into a new file.
 - Make sure that the *Append to an existing tif scan* check box is not selected.
 - Type in the name of the scanned document in the text box below.
- Press the *Start Scanning* button to scan and add the image or images to the document card.

DocPoint retains the last set of parameters used as defaults for future scans.

Manage versions

You can create new versions of a document. DocPoint support two types of versions.

Manage Versio	Durlinte C			
Manage versio	ns Duplicate Ca	ard		
		Subject		
0 manual				
		Sign Digitally	Open	Delet
Description of e	xisting document	Sign Digitally	Open	Delet
Description of e	xisting document	Sign Digitally	Open	Delet
	xisting document	Sign Digitally	Open	Delet
		Sign Digitally	Open	Delet
manual		Sign Digitally	Open	
manual Description of n	ew version	Sign Digitally		

A new document based on an existing document in the same card.

- Select the *Manage Versions* tab.
- Select the document on which to base the new version.
- Type the *Description* of the new version.
- Press the *Create new version* button.
- Document versions are numbered sequentially, with the first version starting at zero.

A new card based on an existing card and its whole contents.

	Do	cPoint		
ersion Manag	gement			
Manage Versions	Duplicate Card			
Subject				
DocPoint User Mar	nual			
Save in document	library			
Shared Library				~
			Dutut	
			Duplicate	
				Close

- Select the *Duplicate* Card tab.
- Type the *Subject* of the new card.
- Select the *Document Library* for this card.
- Press the *Duplicate* button.
- The new card will open. Edit as necessary the card metadata or the linked documents.



Create an outlook task and send alerts

Create Task Send Alert Due Date 17/07/2014 Pescription Follow up Create Task Cancel		DocPoint	L
Start Date Due Date 17/07/2014 T/07/2014 T/07/2014 Start Description Follow up Create Task Cancel	Create Task	Send Alert	
Create Task Cancel	17/07/2014 Description	Due Date	
	Create Ta	sk	Cancel
			Close

You can create a Task in Outlook to remind you about further action in the document.

DocPoint creates a Task with a shortcut to the document. Outlook will alert you on the Due Date. Create a Task

- Select a Start Date and Due Date.
- Type a description of the Task.
- Press the Create task button.

	DocPoint
Create Task Send Alert	0
Select Users	Message
Ela Fitzgerald John Major John Smith Louis Armstrong Margaret Thatcher Melinda Fox Tania Byron	Send me your comments
Send Alert	
	Close

You can send an Alert (a shortcut to the document and a message) to other users. Send an Alert

- Select the users to send the Alert to.
- Type the message
- Press the Send Alert.

Open the document/s linked to the Card

Press the 🚺 button. If only one document is linked to the card it will open immediately.

			DocPoir	nt	
Linke	d Docume	nts			(
Ver 📼			Subject		
1	script				.txt
	Constitution				.pdf

A card can contain several linked document. Usually, related versions of the basic document. The versions are numbered consecutively.

Open a document

• Select the document/s from the list and double click or press the **Open** button. Delete a document

- Select the document/s from the list and press the **Delete** button.
- You cannot delete Version 0 from this form.

Rename a document

• Select the document from the list and press the *Rename* button.

Email

• Select the document/s from the list and press the **Send** button.

Sign Digitally

• You can digitally sign PDF documents. You need to purchase a digital signature from <u>CoSign</u>.



Search Folders

				DocPoint				_ 🗆
Search Folders		Document ty	pe Search the	e Subject	Writer	Select keywor		
From Document date From 13 Jul 2004 To 13 Jul 2014 Find a Folder		ALL In Out Interna	 Whole Part o Similar 	fword	Care of V Addressee			Refresh
elect a Cabinet	Sales / E	Brochures - Sal	es - Demo etc					
Sales	✓ SN	Date 🗸	Writer		Subject		Reference	Classification
Sales	2 4			President Abraham	Lincolns Second Inaugural <i>I</i>		NA NA	Unclassified Personal
E Customers	5	05/08/2013 5	Smith John	DocPoint User Manu	al		Sales / Brochures / 5	Unclassified
Presentations	6	08/06/2013	Smith John	Flight Plan			6 / Sales / Brochures	Unclassified
	2	01/04/2013 F	ox Melinda	DocPoint Brochure			Sales / Brochures / 2	Unclassified
	1	08/01/2013 E	yron Tania	Thank You Letter			Sales / Brochures / 1	Unclassified
	Record 1	L/6		Show contents of al	l sub folders			
Show locked folders								

Search parameters

- **Document date** Set a range for the search.
- **Document type** select the type of documents to search for.
- Search the Subject You can search for word (or phrase) based on: Whole word – an exact search Part of word – find any subject in which part of the word is found. Similar words – search for similar words to the search word. (see Tools>>Similar words)
- Writer DocPoint searches by any part of the writer's name.
- **Care of** select the name from the drop down list.
- Addressee DocPoint searches by any part of the addressee's name.
- *Keywords* –Select the Keyword from the dropdown list. The Keyword is added to the box below. You can add several Keywords to search for. Double click on a Keyword to remove it from the search list.
- The 🕙 button performs a search.
- The *Refresh* button removes your search parameters and resets the results.

Searching

- On the left pane select from the drop down list a Cabinet.
- Below select the Folder. If you select a Cabinet the contents all the folders is displayed.
- The right pane displays the search results.
- If the selected Folder has subfolders you can display their contents by checking the **Show** contents of all subfolders checkbox. The subfolders included in this search are highlighted.

Searching by right click on a column

- Right click on any column.
- A mini menu allows you to:
 Search by selection all rows with same text are displayed.
 Search excluding selection all rows not containing the text are displayed.
 Find type any part of string to search for.



You may use % for AND Boolean condition. You may use | for OR Boolean condition.

You can select in the search results any row or rows.

- Double click on the row or press the *Show card* button to open the card. Once the card is open it is synchronized with any row you select.
- Press the **Open** button to open the document.
- Press the *Send* button to email the selected document/s.
- Press the *Move* button to move the selected card/s to another folder or document library.
- Press the *Export* button to export (copy) the selected document to an external device.
- Press the *Manage Keywords* button to add or remove keyword to/from the selected cards.
- Press the \star button to open the *Favorite Folders* form.

Move Cards

To another Folder

love Ca	rds			
To Folder	To Document Library	Delete	To Workgroup	
Select a Cabi	net	Select a Fo	lder	
Marketing Patents Project Mana Quality Assu Quality Assu Reseach and Sales	gement ance Development		s nding Patents <u>ovisional Applications</u>	
Patents / Pro	visional Applications			
Patents / Pro Move	visional Applications		Add	Remove

- Select the *To Folder* tab.
- Select the target *Cabinet*.
- Select the target *Folder*.
- You can apply one of these actions on the selected cards:
 - Move The cards are moved to the new Folder.
 - Copy A copy of the selected cards and the linked document is created in the new Folder.
 - Add The cards are added to the new Folder. They are now listed in the original Folder and the new one.
 - Remove The cards are removed from the selected Folder if it is not the Main Folder.



To another Document Library

		DocPoi	n	
ove Ca	rds			
To Folder	To Document Library	Delete	To Workgroup	
Select t	he target Document Library	,		
Shared				~
		Move to new l	brary	
				Close

- Select the *To Document Library* tab.
- Select the target *Document Library* from the drop down list.
- Press the *Move to new Library* button.

Delete

o Folder	To Document Library	Delete	To Workgroup
documer			elected cards and all their linked
		Delete	

- Select the *Delete* tab.
- Press the *Delete* button and reconfirm.



To another Workgroup

		DocPoi	nt	
Move Car	rds			۷
To Folder	To Document Library	Delete	To Workgroup	
Select a work	group to move to			
Management	~			
Select a Cabin	et	Select a Fold	der	
Marketing Patents Project Manag Quality Assura Reseach and I Sales	ance		s iding Patents visional Applications	
				Move
				Close

- Select the *To Workgroup* tab.
- Select the target *Workgroup* from the drop down list.
- Select the target *Cabinet*.
- Select the target *Folder*. You can move only to Folders printed in green.
- Press the *Move* button.

Export

You can export selected document to any directory on your computer or network. DocPoint creates a copy of the original and renames it; the new name is the subject of the card or the description of the version.

	DocPoint		
Target Directory			0
	X:\Docs		
Clear target directory			
Start export		Close	

- Press the 💷 button to select the *Target Directory*
- Press the *Start Export* button.

Manage Keywords

DocPoint Document keywords Add Remove Select a category Document keywords Horror story Genres ¥ Search Keywords Farce Historical novel Melodrama Mystery Romance > Science fiction < Close

You can add or remove Keywords from all selected documents in bulk.

Add keyword to all selected documents

- Select a category.
- You may search in the list by typing the first letters of the keyword
- Select the Keyword to add and double click on it or press the **button**.
- Press the **Add** button.

Remove keyword from all selected documents

- Select a category.
- You may search in the list by typing the first letters of the keyword
- Select the Keyword to add and double click on it or press the ≥ button.
- Press the *Remove* button.

Note

The selection screen opens by default with built in *My Keywords* category. This category contains the keywords you frequently use.



Favorites

Favorite Documents

Every time you open a document DocPoint records its name in the *Favorites History List*. DocPoint records the last 30 documents you opened.

You can move documents from the dynamic *History List* to the permanent *Favorites List*. To do that select the document and press the **example** button.

DocPoint	
Favorite Documents)
Favorites	
DocPoint Brochure	
History	
Earth from Apollo 17	
Thomas Edisons Patent drawing for an improvement in electric lamps Elvis Letter To President Nixon	
☐ ∅ ✗ Close	

- To open a document double click on a document name or press the 🔳 button.
- To open the document's card select the document and press the 💷 button.
- To remove a document from a list select the document and press the 💌 button



Favorite Folders

Every time you open a Folder DocPoint records its name in the *Favorites History List*. DocPoint records the last 30 Folders you opened.

You can move Folders from the dynamic *History List* to the permanent *Favorites List*. To do that select the Folder and press the **example** button.

	DocPoint	
Favorite Folder	s	0
	Favorites	
Sales / Customers		
	History	
Sales / Brochures		
Marketing / Graphics Marketing / Competative a	analysis	
riancing / competitive i	and yolo	
🗁 样	a	Close

- To open the Folder for search select the Folder and press the 🖻 button.
- To remove a Folder from a list select the Folder and press the 🗷 button



<u>Tools</u>

Workgroups

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.

	DocPoint			
Workgroups ©	Users With permissin	Write	 Users Without Per Ella Fitzgerald John Major John Smith Louis Armstrong Margaret Thatch Melinda Fox 	
Delete	Reset Permissions			Close

Create 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.

Assign Permissions

- You can assign a Workgroup member permissions to other Workgroups.
- Select the Workgroup
- Select a user/s.
- Click the < button to assign permission, or the <a> button to revoke it.

Delete 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

			DocPoint	
User A	ccounts	-ALL- V	Details Security	0
Active	First Name	Last Name	Active Password	
•	Ella	Fitzgerald	First Name Apply	
✓	John	Major	John Security level	
~	John	Smith	Last Name Administrator V	-
	Louis	Armstrong	Smith	
~	Margaret	Thatcher	Title	4
✓	Melinda	Fox	Document Libraries	
Y	Tania	Byron	Email johns@domain.com Position Windows authentication - Log in Name Set Admin password	
New	Delete	Close		EN

Create a new user

- Press the *New* button.
- Type the details of the new user in the *Details* panel.
 - 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.
 - To allow Windows Authentication of the user, type his Windows Domain Log in name. (e.g davidk)
 - Type a password and click **Apply**.
 - Select the *Security Level* for the user.
 - Press the <u>Preferences</u> 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.
 Select the Workgroup/s and click the solution to assign permission, or the button to revoke it.

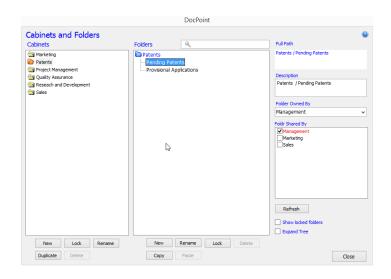
	DocPoi	nt
Ella Fitzgerald	- Managemer	nt 🤍
Workgroups with perr		Workgroups without permission Marketing
Sales	Write	Markeung
	ŀ	<
	3	>
		Close

• Press the *Reset Permissions* button.



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 below the Cabinets pane.
- 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 below the Folders pane.
- 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

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.

Library Name	Library Path	
Personal	 C:\DocPoint14\Dbase Demo\Docs\personal	
Shared Library	 C:\DocPoint14\Dbase Demo\Docs	

- 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.

Create a new Document Library

- Type the Library Name which will be displayed to users.
- Select the path of the new Library by pressing the button.
- Press the *Create New Lib* button.

Document Library's Permissions

DocPoint allows you to set user access permission to each Library. The built in *Shared Library* is open to all users.

	DocPoint	
Document Libra	aries Permissions	•
Document Libraries	Users With permissin	Users Without Permission
becond Shared Library	John Smith	Ella Fitzgerald John Magir Louis Amstrong Margaret Thatther Melinda Fox Tania Byron

- Select a Library from the list.
- Move users between the Users With Permission and Users Without Permission list by pressing the
 and
 buttons.



Contacts

DocPoint's contact database lists names and addresses of recipients of your outgoing mail. In addition, DocPoint allows you to import contact details from Microsoft Outlook and automatically uses contact details with document templates.

Contact List

	DocPoint		
ontacts	Tony Wolfman		(
Contacts Contact groups Outlook			
Search	Full Name		
9	Tony Wolfman		
Alex Popovsky	Organization Name		
Gil Tal Jerry Kesler	ACME		
Joe Alis	Address		
Ruthy Robbins Tony Wolfman	102 Wembley Hill Rd. Wembley		
	Phone 208 908 4907	Email 1 tony@wolfman.co.il	
	Mobile	Email 2	
	Mobile		
	Fax	Email 3	
	ß		
New Delete			
			Close

Create a new Contact

- Press the *New* button type its full name and press the *OK* button.
- Complete by filling in all other details.

Edit a Contact

- Select the contact or find it by typing its name in the *Search* box.
- Edit the details as necessary.

Contacts imported from Outlook cannot be edited.

Delete a Contact

- Select the contact or find it by typing its name in the *Search* box.
- Press the *Delete* button.
 Contacts imported from Outlook cannot be deleted.

Sending an email to a Contact

• Press on the 🖃 button next to the email address.



Contact Groups

		Doo	cPoint	
Contacts	-	-		
Contacts	Contact groups	Outlook		
Groups		Group members Gil Tal Joe Alis Tony Wolfman	Search Alex Popovsky GI Tal Jery Kesler Joe Als Ruthy Robbins Tony Wolfman	
New	De	lete		

You can assemble your contacts into meaningful groups using DocPoint's contact groups. Create a new Group

• Press the *New* button type the name of the group and press the *OK* button.

Add contacts to group

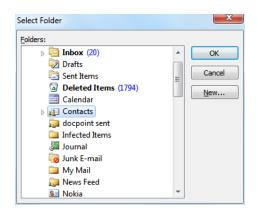
- \circ Select the group.
- \circ $\;$ Select from the list the contacts to add to the group and press the $\;$ $\;$ button.
- Double click on a contact to add to the group.
- Remove contacts from group
 - Select the group.
 - Select from the list of group members the contacts to remove to from the group and press the button.
 - Double click on a group member to remove from the group.
- Delete a group
 - Select the group.
 - Press the *Delete* button.

Importing Contacts from Outlook

You can import contacts from your Outlook contact list into DocPoint.

			DocPoint		
Contacts			Tony Wolfman		
Contacts	Contact groups	Outlook			
	Outle	ook contacts fold	er @gmail.com\Contacts (This computer only)\	-	
		1105 106	ginaliteoin (contacts (mis computer only) (
		odate Contacts			
					Close

• Press the 📃 button. An Outlook window opens.



- Select the contacts folder to import and press the **OK** button.
- Press the *Update Contacts* button.



Keywords

Keywords are tags that you can assign to a document. You can assign as many keywords as you like, and rename or delete keywords as you organize your information repository.

Keywords complement the Cabinets and Folders system. For example, you can archive each Invoice in the specific supplier's Folder and at the same time add 'Invoice' key word. This will enable you to retrieve all the invoices regardless of the Folder they are in.

That's great for organizing personal data, but it goes even further when someone else in your organization classifies documents or emails with the same keywords. You begin building a collaborative repository of related information, driven by the same flat-based keyword scheme.

				DocPoint		
Ke	ywords					٥
Ke	ywords	Categories				
				Category		
•	Colors					
	General					
	Genres					
	Landforms					
	Music					
*						
[Delete		17			Close

Keywords are grouped n Categories like 'Document types', 'Banks', 'Administration' etc.

- To create a Category press on the *Categories* tab.
- Type the name of the new category in the last empty row in the list.
- To remove a Category, select it and press the *Delete* button. This will remove all the keywords in this category from all documents.



Managing Keywords

	eywords Categories	Select a category -ALL-		
	Keyword	Category		,
►	Amber	Colors	~	
	Aqua	Colors	~	
	Azure	Colors	~	
	Beach	Landforms	~	
	Beige	Colors	~	
	Blue	Colors	~	
	Blues	Music	~	
	Classical	Music	~	
	Crimson	Colors	~	
	Emerald	Colors	~	
	Farce	Genres	~	
	Gold	Colors	- V	ŀ

Create a new Keyword

- Keywords must be generic terms like 'Invoice', 'Delivery Note', 'HSBC', 'Check" etc.
- Press on the *Keywords* tab.
- Select the *Category* for the new Keyword.
- Type the new Keyword in the last empty row in the list.

Remove a Keyword

• Select the keyword and press the *Delete* button. This will remove the keyword from all documents.

Edit a Keyword

• Select the keyword and edit it or change its category by selecting another one from the drop down list.



Similar Words

DocPoint allows you to search for documents using words that don't necessarily appear in the document's subject title.

For example, you can decide that the word "evaluation" is similar to "examination," "test," or "trial." This provides you with greater flexibility when searching for information.

You can create a list of similar words which are common in your organization.

Doe	cPoint
Similar Words	۷
List of Words	test - List of similar words
report	examination
test	trial
New Delete	Add Delete Close

Add a new word

• Press the *New* button and type the new word.

Define similar words

- Select a word in the *List of Words*.
- Press the *Add* button and type a similar word.

Deleting

• Select the word and press the *Delete* button. When you delete a word from the List of Words the similar words are deleted as well.



Classifications

You can create your own document classifications. Creating document classifications can help you in the process of arranging documents according to shared characteristics.

DocPoint	
Classifications	٢
Classifications	
Draft	
Personal	
Unclassified	
Delete	Close

- To create a new Classification, type its name in the last empty row.
- To edit a Classification, select the row and type the new name.
- To delete a Classification, select the row and press the *Delete* button.



Document Templates

DocPoint integrates with Microsoft Office templates for Word, Excel, and PowerPoint. DocPoint can do a large part of the work required when creating a new document for you if your templates are well thought out.

Working with DocPoint templates:

- Saves you time.
- Ensures that your documents share a consistent appearance throughout the organization.

		DocPoint		
Do	ocument Tem	Select a category		(
	Category	Description	Date Format	File Name
F	HIPAA	Notice of Privacy Practices	Short	1003.dot
	HR Evaluations	Administrative Staff Performance Evaluation	Short	1005.dot
	HR Evaluations	Auditor Performance Evaluation	Short	1001.dot
	HR Evaluations	Senior Auditor Performance Evaluation	Short	1002.dot
	Reports	Time Report	Short	1004.xlt
	Standard letters	Standard Letter	Short	1000.dot
	Open	New Update Duplicate Import Categorie	s Delete	Close

- Templates are organized by logical categories. To manage the categories press the <u>*Categories*</u> button.
- To create a new template, press the <u>New</u> button.
- To edit a template, select the template and press the <u>Update</u> button.
- You can create a new template based on an existing one.
 To duplicate a template, select the template and press the <u>Duplicate</u> button.
- You can add existing templates to DocPoint. To import a template, press the *Import* button and select it in your file system.
- To delete a template, select the template and press the *Delete* button.
- If you want to make a <u>Smart Template</u> press the <u>Update</u> button and add Bookmarks.



Template Categories

General Tests Updates Welcome	
▶ welcome	
*	

- To create a new Category, select the last empty row and type the name of the new category.
- To edit a Category, select the row and edit the name of the category.
- To delete a Category, select the row and press the Delete button. A Category containing templates cannot be deleted.

Create a new template

CI	eate a	New Templa	te		
Create a New T	Templ	ate			0
Description					
Standard Letter 5086					
Category		Date Format		Template	type

- Type a *Description* for the new template.
- Select a *Category* from the drop down list.
- Select the preferred **Date Format**.
- Select for which Office application is the template.
- Press the *Create Template* button.
- The Office application will open.
- Design the template, close and press the *Close* button.

Update an existing Template

	Update This Template	
Update This	Template	0
Description		
DocPoint Activation K	(eys	
Category	Date Format	
General	✓ Short ✓	

- Edit the *Description* for the template.
- Edit the *Category* from the drop down list.
- Edit the preferred **Date Format**.
- Press the **Open** Template button.
- The template will open.
- Edit the template and close it.
- If you added Bookmarks to the template press the *Create Bookmarks* button. This feature is supported by Office 2010 and higher only.
- Press the *Save* button.



Duplicate an existing Template

Duplicate a	Template	e	٩
Description			
DocPoint Activation K	(eys-5086		
Coloren		Date Format	
Category			

- Edit the *Description* for the new template.
- Edit the *Category* from the drop down list.
- Edit the preferred *Date Format*.
- Press the **Open Template** button.
- The new duplicated template will open.
- If you added Bookmarks to the template press the *Create Bookmarks* button. This feature is supported by Office 2010 and higher only.
- Edit the template, close and press the *Save* button.

Creating a Smart Template with Bookmarks (Word and Excel)

A *Smart Template* is a template that maps the metadata to defined location in the newly created document. This is done by the use of Bookmarks.

Just type and format the Bookmark in place of the data.

	bmDate
	<u>Ref</u> : bmRef
Revision: bmDocRev	
File Name: bmFileName	
bmFullAddress	
Re: bm	<u>Subject</u>
bmBody	
Sincerely Yours	
bmTitle bmWriter	
bmPosition	
bmAddressFlat	

When DocPoint creates a document based on this template the result looks like this:

	July 19, 2012
R	tef: 66998 / Clients / Copping Tom
Revision: 1	
File Name: 66998RT1.docx	
Tom Copping (tom@glynderi.co.uk)	
93A Oakington Ave.	
Wembley	
UK	
Re: Thank you for your purchase of	<u>f DocPoint</u>
Type hear your text	
Sincerely Yours	
Kaplan Edith	
Sales Manager	
Tom Copping (tom@glynderi.co.uk)	



List of Bookmarks

JUKITIALKS	
bmClassification	Classification of the card.
bmDate	Date of the card.
bmRef	Reference of the card.
bmFullAddress	Addressee's full address.
bmAddress	Addressee's name.
bmSubject	Subject of the card.
bmFullPath	Full path of the document.
bmWriter	Full name of the writer.
bmTitle	Title of the writer.
bmPosition	Position of the writer.
bmFname	First name of the writer.
bmLname	Last name of the writer.
bmLogo	Name of the organization.
bmKeyWords	String of Keywords.
bmCabinet	Cabinet of card.
bmFolder	Folder of the card.
bmFileName	Name of the file.
bmID	Serial number of the card.
bmDocRev	Revision number of the document.
bmBody	A place holder for the cursor for inserting text
	to the document.



Import

You can import into DocPoint selected document from any directory on your computer or network.

DocPo	bint
Import Documents	Q
Select source directory	Select the documents to import
X:\Docs	Automatic ID for each document.doc Backup of Curriculum vita.doc
Select target document library	brochure.doc brochure1.doc
Shared Library 🗸	chart
Workgroup	CHART.DOC compare.doc D5.doc
Management v	D7.DOC
Target Cabinet	Dear Joe.doc DisasterRec.doc DocPoint.odf
Ouality Assurance	Do_It.mdw
Create a new folder under this cabinet Target Folder	INTRO.DOC jacob.tif jacob.wWAB Mail It Brochure.pdf
Quality Assurance / Test Blans	New Text Document.txt New Text Document.txt - Shortcut.ink
Create a new folder under this folder	POST.INI POST.MDA post_db.mdb
Document type Writer	PPThumbs.ptn PRICE.DOC
Internal V Louis Armstrong V	rmb.doc security db.mdb
Keywords	SPEC.DOC templates 1093.dot
Amber,	templates 1290.dot Thumbs.db
Add to a single card	uk.bt Zosha.xls חסכון בזמן
Available Space = 184,856,392 KB Close	Start Import

- Press the 💷 button to select the *Source Directory*. In the right box a list of all files contained in this directory are listed.
- Select from the combo box the *Target Document Library*.
- Select from the combo box the *Target Cabinet*. If you check *Create a new folder under this cabinet* a new folder whose name is the *Source Directory* is created.
- Press the button to select the *Target Folder*. If you check *Create a new folder under this folder* a new sub folder whose name is the *Source Directory* is created.
- Select from the combo box the *Document Type* to be created.
- Select from the combo box the *Writer* to be assigned to the newly created cards.
- Press the 🔜 button to select the *Keywords* to be added to the newly created cards.
- Select from the right hand box the files to be imported and press the *Start Import* button.
- If you check the Add to a single card, only one new card is created and all selected documents are added to it. Otherwise a new card is created for each document.



Preferences

DocPoint preferences allow you to configure document creation and search defaults and general system settings. DocPoint preferences are grouped in three sections;

General settings

Do It software Administrator - Preferences		<u> </u>
General Cards Language		
Organization Name		
Do It software		
Search Folders Search period - months 240 Cabinet Search period - months 240 Cabinet Auto size row height Show contents of all sub folders Remember last Cabinet Folder	Make keywords required	
Document type		
		Close

- **Organization Name** Type your organization's name.
- Search Period Define the default date range for document search results.
- **Cabinet** Select the default Cabinet when starting the Folders search.
- Auto size row height Check to show in Folder search the full content of each row.
- **Show contents of all subfolders** When selected, search results of a folder containing subfolders displays the content of all subfolders.
- **Remember last** When selected DocPoint search resumes the search, when restarted, from the last entity selected.
- *Make keywords required* Forces all users to assign to each new card at least one keyword. This feature is set by the Administrator only and applies to all users.

Document Cards

and a second sec				
ministrator - Preferences				
Seneral Cards Language				
in	Out		Internal	
Document library	Document library		Document library	
Shared Library 🗸	Shared Library	*	Shared Library	
Classification	Classification		Classification	
Unclassified v	Unclassified	~	Unclassified	
Folder	Folder		Folder	
Sales / Customers	Sales / Customers		Sales / Brochures	
File type to attach to card	File type to attach to card		File type to attach to card	
ALL (*.*) V	ALL (*.*)	~	ALL (*.*)	
	Template name		Template name	
	Standard Letter	~	-Blank Page (No template)-	
	Auto reference	Suffix	Auto reference	Suffix
Make Doc Library default for all users				

• Define the default settings for each card.



Language

	DocPoint	
Administrator - Preferences		0
General Cards Language		
	User Interface Language	
	English V	
	Apply new language	
	Keboard language	
	English (United States)	
	Close	

- Select from the list the User interface language you want for DocPoint. Make sure that the SQL collation supports this language. This is set by the Data Source applet.
- Select from the list the default keyboard language when DocPoint starts.



DocPoint Security

DocPoint is a secure program. Each user is assigned a *Security Level* (Read, Write or Administrator) A built in user named **Administrator** can manage all the tasks and has permission the whole program. Security Principles

- DocPoint Express has no security. The user is by default the Administrator.
- DocPoint Corporate supports an unlimited number of Workgroups.
- DocPoint Professional edition supports, by default, only one Workgroup.
- The operating system's permission policies overrule DocPoint's permission policies.

Users

- A user is part of a workgroup.
- A user creates documents that belong to his workgroup.
- A user has access to all documents that belong to his workgroup.

Documents

- A document belongs to the user's workgroup.
- The administrator can grant one workgroup complete access to another workgroup's documents.

Cabinets and Folders

- Information is categorized according to cabinets.
- Cabinets consist of folders.
- Folders consist of documents.
- Folders belong to a workgroup.

Saving Documents

- DocPoint saves files in their original format.
- DocPoint saves files in libraries on a file server.
- The administrator is responsible for creating and defining libraries on the file server.
- All users have read/write permission to the default 'Shared Library'.
- The administrator can grant users access to additional libraries.

A user with a Security level of Administrator has limited permissions than the built in Administrator. Tasks that a user with Administrator Security level can perform are:

Manage Cabinets and Folders

- Corporate Can create new Folders for his workgroup only. No permission to delete folders.
- Professional Can create new Folders only. No permission to delete folders.

Manage Contacts

- Corporate Can manage Contacts for his workgroup only.
- Professional Can manage Contacts.



How to Install DocPoint 14

- The installation must be done in the client's session. An administrative permission is required.
- Prerequisite: .NET 3.5 and .NET4 must be installed.

DocPoint Express

DocPoint 14 Express can be installed on Windows 7/8/10.

See:

- How to install and configure DocPoint Express.
- How to connect DocPoint Express or Free to the Data Source.

DocPoint Professional or Corporate

DocPoint 14 Professional or Corporate can be installed on Windows XP/7/8 and on any Terminal Server.

See:

- How to setup DocPoint 14 database on a SQL server.
- How to connect DocPoint Express or DocPoint Free to the Data Source.

DocPoint Setups Download Links

- DocPoint Express Trial
- DocPoint Express Free

The following downloads require a User Name and Password

- DocPoint Express
- DocPoint Professional
- DocPoint Corporate
- DocPoint Reader



DocPoint Connectors

DocPoint and MS Office are connected symmetrically. Namely, MS Office can be activated from within DocPoint and documents can be archived directly in DocPoint from within MS Office.

DocPoint comes with these connectors:

Outlook, Word, Excel and Power point connectors for Office. Windows Explorer connector for the file system.

Outlook Connector

Once DocPoint is installed, a new **DocPoint** tab is added to the Outlook Ribbon. This tab appears only when emails in the **Inbox** or **Sent Items** are selected or opened.

Incoming Mail

To add an incoming mail to DocPoint, select the DocPoint tab in the Ribbon and press the DocPoint item to open the *Incoming Mail* card

DocPoint - Inbox								
d this document to DocPoint								
Favorites	<						٩	
🔯 Inbox			ch Inbox (Ctrl+E)	1		-		N
🛅 Sent Items		12	🗅 🕘 From	Subject		Received *	S (🕆 🔺	D
Deleted Items (1043)			Date: Tuesday					S
		-	SQLServerCentr	New SOL Server 2014	Permissions: CONNECT .	Tue 29/07/2014 08:15	1 12	0
jacob@do-it.co.il	ñ	6	<u>~</u>				a bella	_
4 🧕 Inbox				Archive in	DocPoint - Admin	istrator		
Ashik Bids	=	4	Incoming Mail					14.0.
armit		2						
🦲 data prep			Cabinet and Folder	Key Words	Add to existing card			
Deliveries			Subject					
4 🚞 DocPoint			New SQL Server 201	Permissions: CONNEC	ANY DATABASE (SQLServ	erCentral 7/29/2014)		
Clients								
ENGLISH SITE HEBREW SITE			Sender					
Pads			SOLServerCentral.com	1				
Documents								
Fax	Ŧ		Folder					
Ail Mail			Sales / Customers					•
Mail Nail			Sales / Customers					
👖 Calendar								
Contacts		1	Document Library		Letter date	Received on		
Contacts			Shared Library	~	29 July 2014	□ 03 August	2014 🔲	•
💙 Tasks								
- -		1		Target Da				
Notes			Add to Outlook Ta	sks 03 Augus	2014	Add attacments only		
Folder List								
Shortcuts			Archive in DocPoint	Save Format			Cance	

- **Subject** is by default is the subject of the email.
- **Sender** is name of the email sender.
- Document Library is the default Library set by the Preferences.
- Folder is the default Folder set by the Preferences.
- The Letter date is the actual date of the email and the Received on is the current date.
- You can create a Task in Outlook by checking the *Add to Outlook Tasks* checkbox and set a *Target Date.*
- You can add only the email's attachment/s by checking the *Add attachments only* checkbox.
- Check Save Format for the appropriate format to save the email body.
- Add Keywords or add the email to an existing card.
- Press the *Archive in DocPoint* button to complete the process.



Outgoing Mail

To add an outgoing mail to DocPoint, select the DocPoint tab in the Ribbon and press the DocPoint item to open the *Outgoing Mail* card.

File Message Insert	Options Format Text Review DocPoint	
DocPoint - Sent Items	Archive in DocPoint - Administrator Outgoing Mail	14.0.0.21
Add this document to DocPoint From From Jacob@d To Do It Sof Cc Bcc Subject: EV: Dre	Cabinet and Folder Key Words Add to existing card Subject FW: DreamHost Newsletter v16.9 September 2014 Writer Samut Kaplan	
Subject: FW: Dre From: DreamHost Septembé Sent: Wednesday, October 1 To: Jacob at Do It Software Subject: DreamHost Newsle Having problems viewing this ema	Folder DocPoint / Target Reference Email Document Library	
	Customers Target Date OI October 2014 Save Format Send and Archive Save Format html bt msg	Cancel

- **Subject** is by default is the subject of the email.
- *Writer* is by default the user's name.
- **Document Library** is the default Library set by the **Preferences**.
- Folder is the default Folder set by the Preferences.
- You can create a Task in Outlook by checking the *Add to Outlook Tasks* checkbox and set a *Target Date.*
- Check **Save Format** for the appropriate format to save the email body.
- Add Keywords or add the email to an existing card.
- Press the *Send and archive* button to complete the process.



Word, Excel and PowerPoint Connectors

Once DocPoint is installed, a new **DocPoint** tab is added to the Word, Excel and PowerPoint Ribbon. To add the current document to DocPoint select the **Archive in DocPoint** in this tab. The following Card opens.

FILE HOME INSERT	CoSign DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW	DocPoint			
Archive in	Archive in DocPoint				
DocPoint	Outgoing Mail	14.0.0.8			
	Cabinet and Folder Key Words Add to existing card				
	Subject Manual draft				
	Writer				
	Carmit Kaplan Folder	×			
	DocPoint / training / Manuals				
	Target Date Document Library				
	Add to Outlook Tasks 01 October 2014 🔍 Shared Library	~			
	DocPoint - Outgoing Mail				
	Addressee Email				
	John Lewis Jhon@acme.com				
	102 Wembley Hill Rd. London	^			
		<u> </u>			
	Archive in DocPoint	Cancel			

• Type the *Subject* of the document.

You can modify these fields as necessary.

- Writer is by default is the user's name.
- **Document Library** is the default Library set by the **Preferences**.
- Folder is the default Folder set by the Preferences.
- You can create a Task in Outlook by checking the *Add to Outlook Tasks* checkbox and set a *Target Date.*
- Add Keywords or add the document to an existing card.

By default an Internal Card is created. To create an Outgoing mail card check the Checkbox and fill the addressee, Address and email of the recipient.

• Press the *Archive in DocPoint* button to complete the process.



Windows Explorer Connector

You can add any file in the file system of your computer the DocPoint. Just select the file and right click the mouse. In the mini menu select the *Add To DocPoint* item.

Open with Adobe Reader XI Open Print Sign with CoSign Add To DocPoint Scan with ESET NOD32 Antivirus Advanced options Open with ۲ Share with ۲ Send to ۲ Cut Сору Create shortcut Delete Rename Properties

This will open the *Internal Document Card*.

	Archi	ve in DocPoint		
ternal Document Card				14.0.0
Cabinet and Folder	Key Words	Add to existing card		
Subject				
docpoint 14 manual				
Writer		Document Library		
John Smith		 Shared Library 		~
Cabinet Sales				
Folder Sales / Brochures				
Sales - Demo etc				
Add to Outlook Task	5		rget Date August 2014	
Archive in DocPoint			C	ancel

You can modify the fields as necessary.

- **Subject** is by default is the name of the file.
- *Writer* is by default is the user's name.
- Document Library is the default Library set by the Preferences.
- Folder is the default Folder set by the Preferences.
- You can create a Task in Outlook by checking the *Add to Outlook Tasks* checkbox and set a *Target Date.*
- Add Keywords or add the document to an existing card.
- Press the *Archive in DocPoint* button to complete the process.



More Functions

Each of these connectors allows you to add Keywords or add the document to an existing card.

Add Keywords

- Select the Key Words tab.
- Select a key words group.
- Select the keyword/s from the list and double click or press the \triangleright button.
- To remove a keyword from the list, select it and double click or press the < button.

	Archi	ve in DocPoint	
nternal Document Card			14.0.0.
Cabinet and Folder	Key Words	Add to existing card	
Select a keyword group			
Landforms		•	
	2	Keywords attached to	this document
Beach Plain Plateau Valley Volcano		Mountain	
Archive in DocPoint			Cancel

Add to an existing card

- Select the *Add to existing card* tab.
- Type the ID of the card to add to.
- Mark the radio button of the card to add to.
- Press the *Add to this card* button.

Archive in DocPoint					
Internal Document Card	14.0.0.7				
Cabinet and Folder Key Words Add to existing card					
Type the SN of the Card and select its type					
Out					
Change of address note					
Sales / Customers					
○ In					
• Internal					
How to Write a Patent					
Patents / Pending Patents					
Add to this card					
Archive in DocPoint	Cancel				