



DocPoint 14

User Manual

September 2015

Do It Software Ltd

Ver: 1.0.2

support@docpoint.biz

<http://www.docpoint.co.uk>

Table of Contents

DOCPOINT 14 OVERVIEW	3
START USING DOCPOINT	3
<i>The Main Menu</i>	<i>4</i>
CREATE A NEW DOCUMENT.....	5
INCOMING LETTER CARD	5
<i>Create a new Card</i>	<i>5</i>
<i>More functions</i>	<i>5</i>
OUTGOING LETTER CARD	6
<i>Create a new Card</i>	<i>6</i>
<i>Create a Word document</i>	<i>6</i>
<i>More functions</i>	<i>6</i>
INTERNAL DOCUMENT CARD.....	7
<i>Create a new Card</i>	<i>7</i>
<i>Create an Office document.....</i>	<i>7</i>
<i>Add other documents</i>	<i>7</i>
<i>More functions</i>	<i>7</i>
CARD FUNCTIONS.....	8
<i>Select a Folder</i>	<i>8</i>
<i>Select Keywords.....</i>	<i>8</i>
<i>Scan a new Document</i>	<i>9</i>
<i>Manage versions</i>	<i>11</i>
<i>Create an outlook task and send alerts</i>	<i>12</i>
<i>Open the document/s linked to the Card.....</i>	<i>13</i>
SEARCH FOLDERS	14
SEARCH PARAMETERS	14
SEARCHING	14
<i>Searching by right click on a column</i>	<i>14</i>
MOVE CARDS	15
<i>To another Folder</i>	<i>15</i>
<i>To another Document Library.....</i>	<i>16</i>
<i>Delete</i>	<i>16</i>
<i>To another Workgroup</i>	<i>17</i>
EXPORT	17
MANAGE KEYWORDS	18
<i>Add keyword to all selected documents</i>	<i>18</i>
<i>Remove keyword from all selected documents</i>	<i>18</i>
FAVORITES	19
FAVORITE DOCUMENTS	19
FAVORITE FOLDERS.....	20
TOOLS	21
WORKGROUPS.....	21
<i>Create a new Workgroup</i>	<i>21</i>
<i>Assign Permissions.....</i>	<i>21</i>
<i>Delete a Workgroup</i>	<i>21</i>
USER ACCOUNTS.....	22
<i>Create a new user.....</i>	<i>22</i>
<i>Delete a user.....</i>	<i>22</i>
<i>Workgroups (DocPoint Corp edition).....</i>	<i>22</i>
CABINETS AND FOLDERS.....	23
<i>Cabinets.....</i>	<i>23</i>
<i>Folders</i>	<i>23</i>
<i>Workgroups and sharing Folders (Corporate edition only)</i>	<i>23</i>

DOCUMENT LIBRARIES.....	24
<i>Create a new Document Library</i>	24
<i>Document Library's Permissions</i>	24
CONTACTS	25
<i>Contact List</i>	25
<i>Contact Groups</i>	26
<i>Importing Contacts from Outlook</i>	27
KEYWORDS.....	28
<i>Managing Keywords</i>	29
SIMILAR WORDS	30
<i>Add a new word</i>	30
<i>Define similar words</i>	30
<i>Deleting</i>	30
CLASSIFICATIONS	31
DOCUMENT TEMPLATES	32
<i>Template Categories</i>	33
<i>Create a new template</i>	33
<i>Update an existing Template</i>	33
<i>Duplicate an existing Template</i>	34
<i>Creating a Smart Template with Bookmarks (Word and Excel)</i>	34
<i>List of Bookmarks</i>	35
IMPORT	36
PREFERENCES	37
<i>General settings</i>	37
<i>Document Cards</i>	37
<i>Language</i>	38
DOCPOINT SECURITY	39
SECURITY PRINCIPLES	39
USERS	39
DOCUMENTS	39
CABINETS AND FOLDERS.....	39
SAVING DOCUMENTS	39
<i>Manage Cabinets and Folders</i>	39
<i>Manage Contacts</i>	39
HOW TO INSTALL DOCPOINT 14.....	40
DOCPOINT EXPRESS	40
DOCPOINT PROFESSIONAL OR CORPORATE.....	40
DOCPOINT SETUPS DOWNLOAD LINKS.....	40
DOCPOINT CONNECTORS.....	41
OUTLOOK CONNECTOR.....	41
<i>Incoming Mail</i>	41
<i>Outgoing Mail</i>	42
WORD, EXCEL AND POWERPOINT CONNECTORS	43
WINDOWS EXPLORER CONNECTOR	44
MORE FUNCTIONS.....	45
<i>Add Keywords</i>	45
<i>Add to an existing card</i>	45

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.

DocPoint 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:

- [Workgroups](#) (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.
- [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.
- [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

- [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.

[Workgroups](#)

[User Accounts](#)

[Cabinets and Folders](#)

[Contacts](#)

[Keywords](#)

[Similar Words](#)

[Classifications](#)

[Document Libraries](#)

[Document Templates](#)

[Import](#)

[Preferences](#)

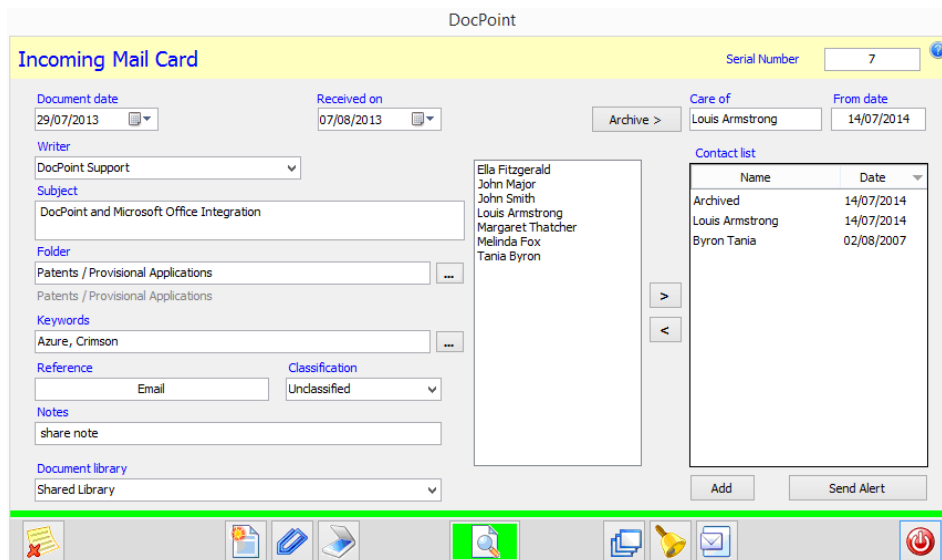
Create a new document

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




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.
- Press the  button 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.
- Press the  button 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.
-  Close 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


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.
- [Press the !\[\]\(5d2b0686f24c91a69ec6f054f466d184_img.jpg\) button](#) next to the **Folder** text box to select the Folder/s the Card is assigned to.
- [Press the !\[\]\(ef97c4cf774c94401d40a852a635219b_img.jpg\) 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.
- [Press the !\[\]\(51a3b3d739efe92b5a87bb7fdd8bc4bf_img.jpg\) button](#) 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.
-  Close the Card.

Internal Document Card


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.
- [Press the !\[\]\(3df135a685d1b545c4fa64a5f3516545_img.jpg\) button](#) next to the **Folder** text box to select the Folder/s the Card is assigned to.
- [Press the !\[\]\(de62294faded52808857591d246c2e7a_img.jpg\) 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

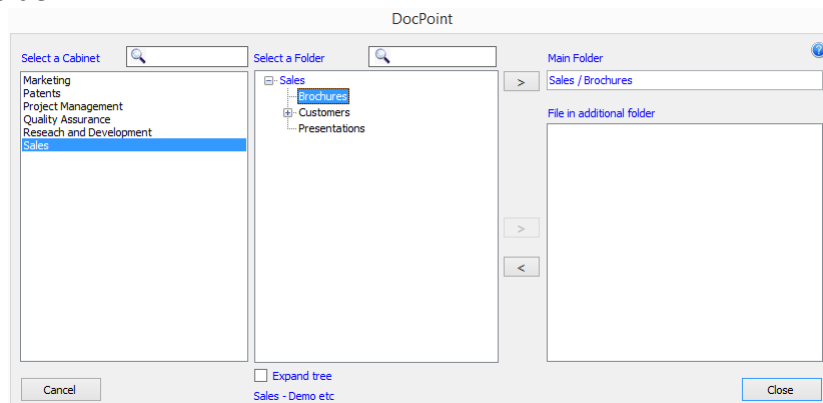
- Press the  button to attach an existing files to the Card.
- [Press the !\[\]\(ba0878532603d6e0b20c60ffb7475d12_img.jpg\) button](#) to scan the paper documents.

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.
-  Close the Card.

Card Functions


Select a Folder




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.

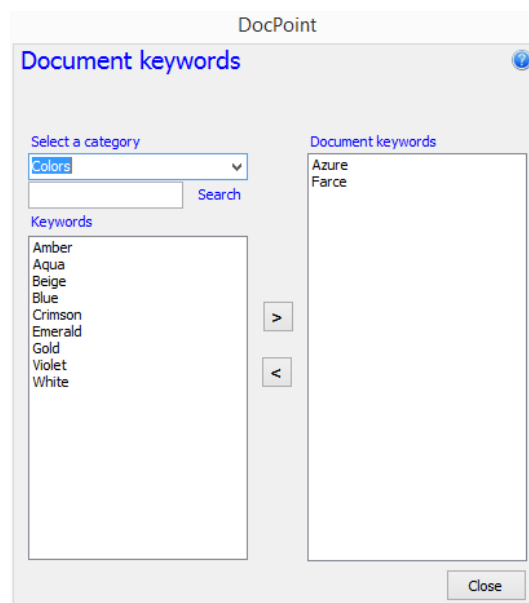
Assign to more Folders

- 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.

Select Keywords



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  button or double click

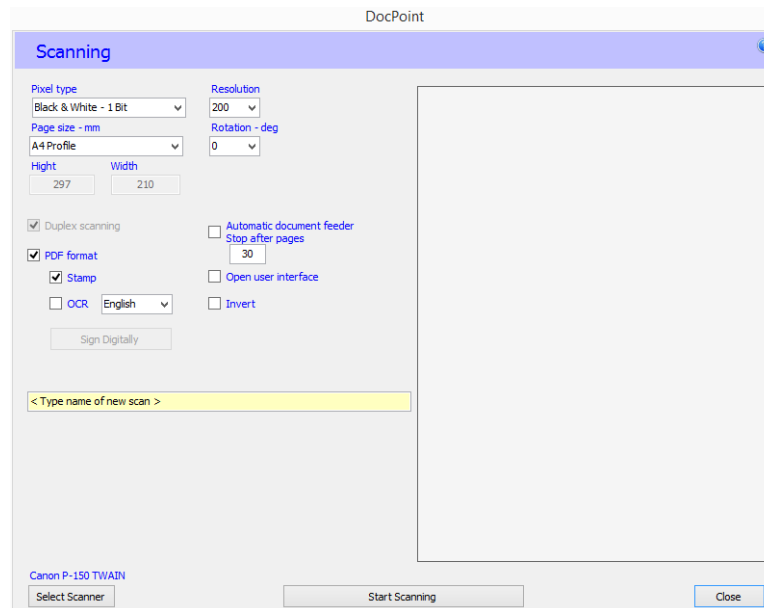
Note

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



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 [CoSign](#).
- Open user interface** - You can use the scanner's interface to make use of scanner specific features.

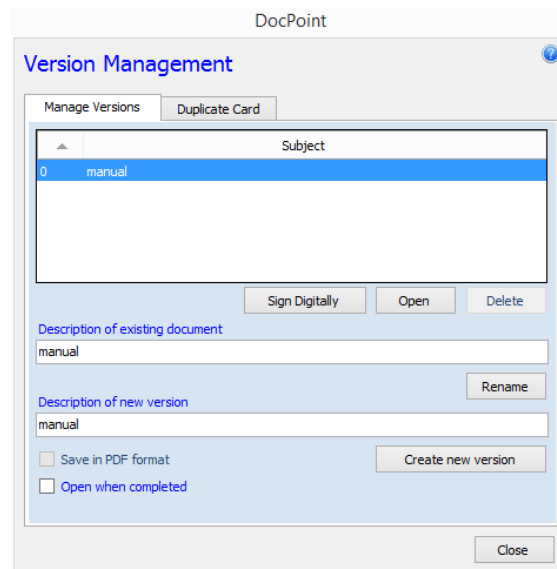
-
- **Invert** - Scan images in inverted color.
 - **Append to an existing tiff scan** – When using the **tiff** format you can scan documents and add them to existing files. Images are appended to the end of the existing file. If the document card is associated with more than one image, select the image 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

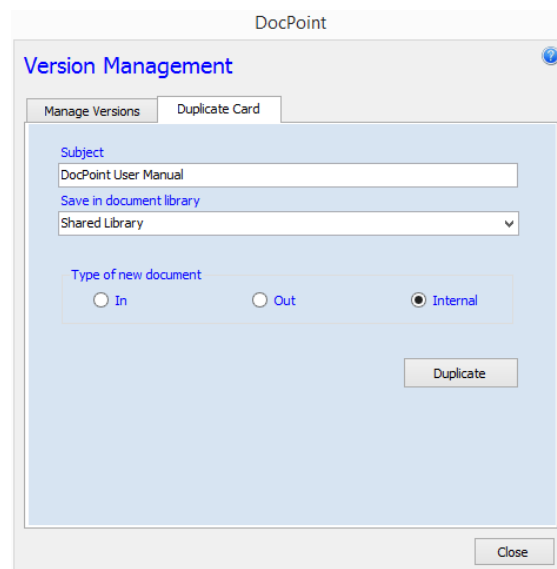
You can create new versions of a document. DocPoint support two types of versions.

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



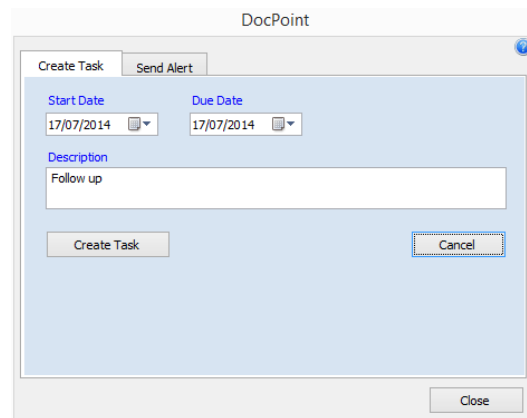
- Select the **Manage Versions** tab.
- Select the document on which to base the new version.
- Type the **Description** of the new version.
- Press the **Create new version** button.
- Document versions are numbered sequentially, with the first version starting at zero.

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



- 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.

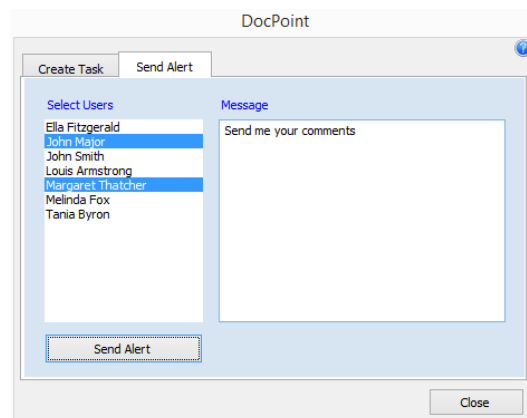
Create an outlook task and send alerts



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.




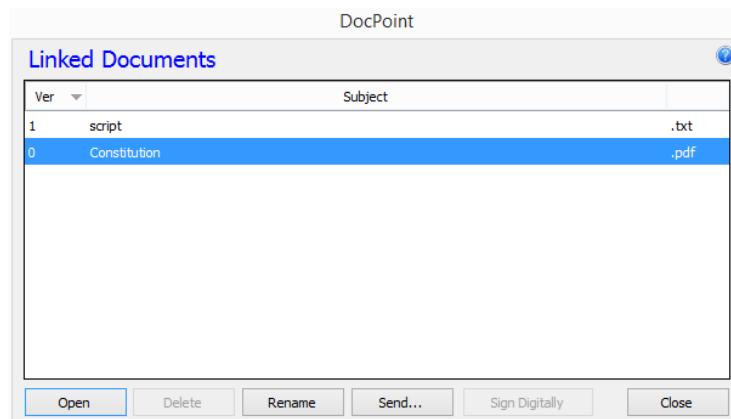
You can send an Alert (a shortcut to the document and a message) to other users.

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.



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.

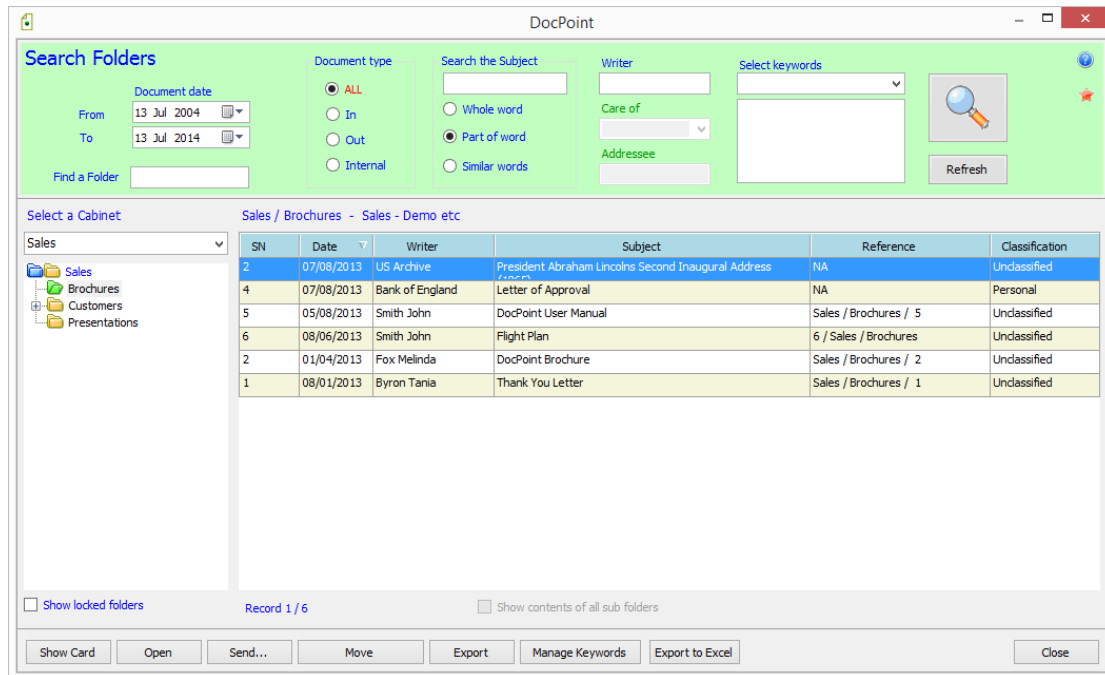
Email

- 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 CoSign.

Search 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.

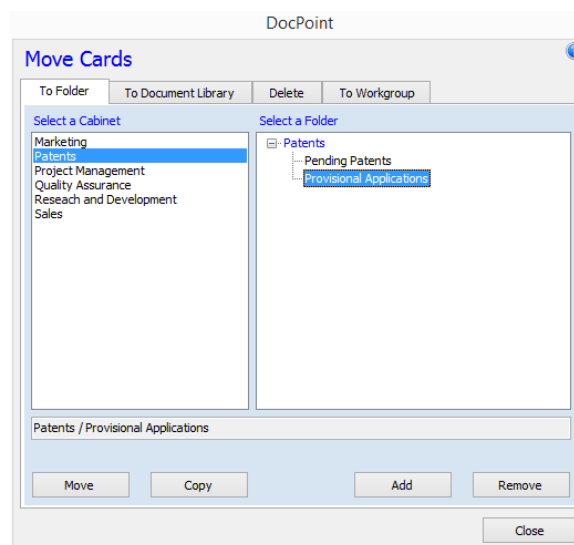
You may use | for OR Boolean condition.

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  button to open the **Favorite Folders** form.

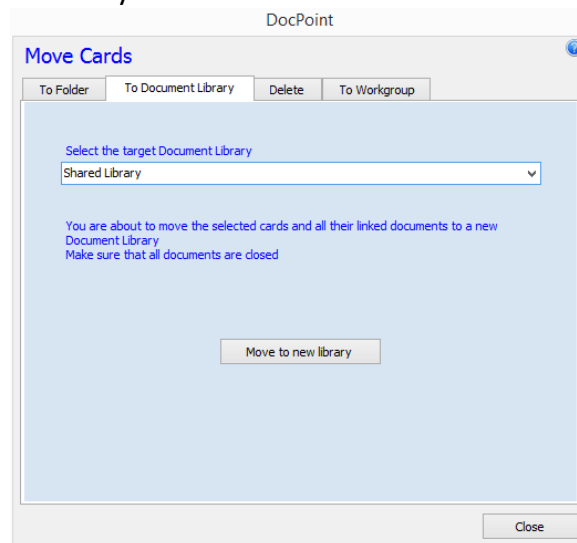
Move Cards

To another Folder



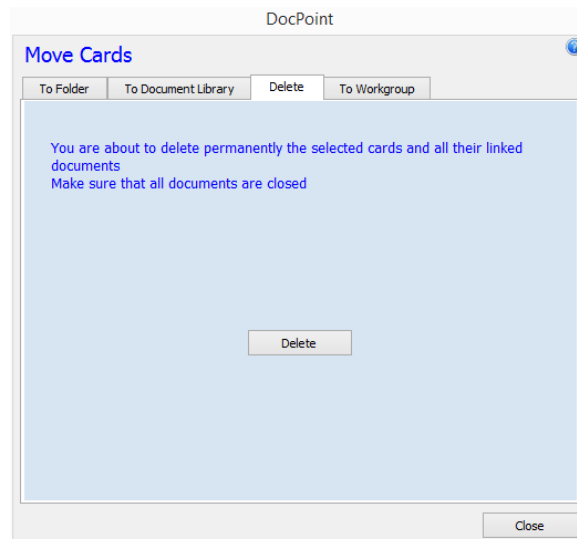
- Select the **To Folder** tab.
- Select the target **Cabinet**.
- Select the target **Folder**.
- You can apply one of these actions on the selected cards:
 - Move – The cards are moved to the new Folder.
 - Copy – A copy of the selected cards and the linked document is created in the new Folder.
 - 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



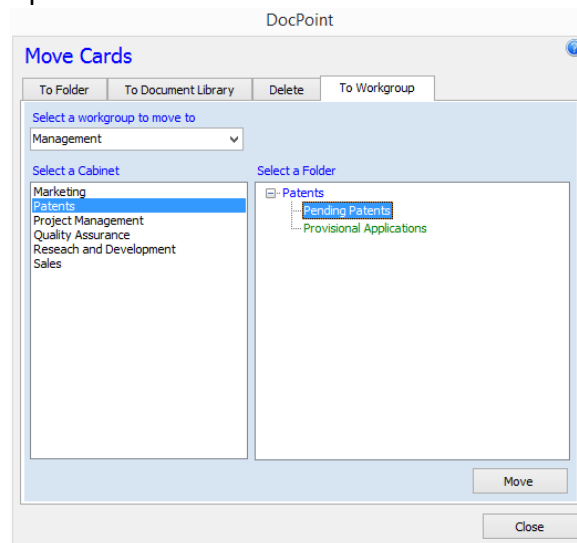
- Select the **To Document Library** tab.
- Select the target **Document Library** from the drop down list.
- Press the **Move to new Library** button.

Delete



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

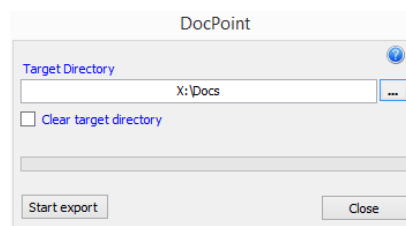
To another Workgroup




- 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

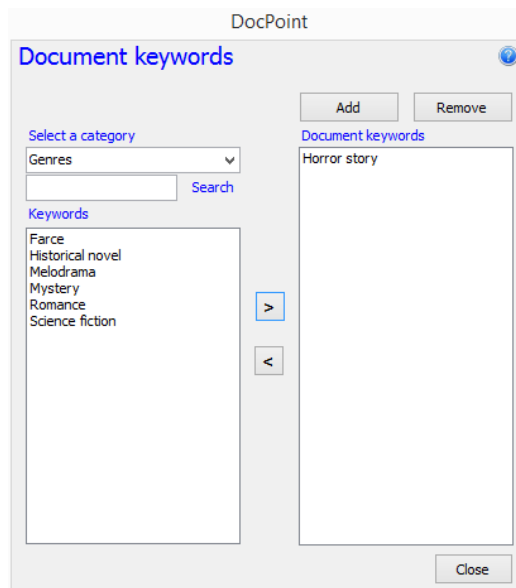
You can export selected document to any directory on your computer or network. DocPoint creates a copy of the original and renames it; the new name is the subject of the card or the description of the version.




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

Manage Keywords


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

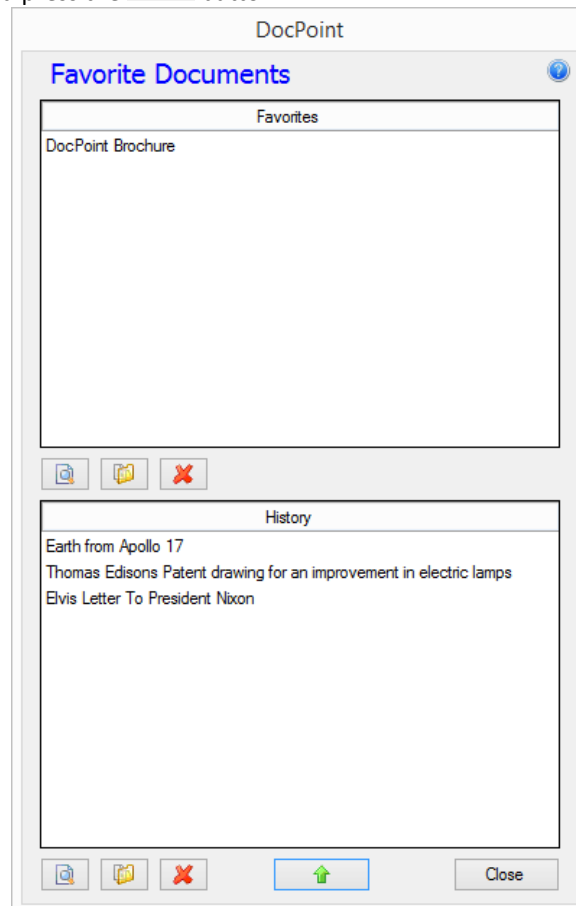
The selection screen opens by default with built in **My Keywords** category.
This category contains the keywords you frequently use.




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  button.

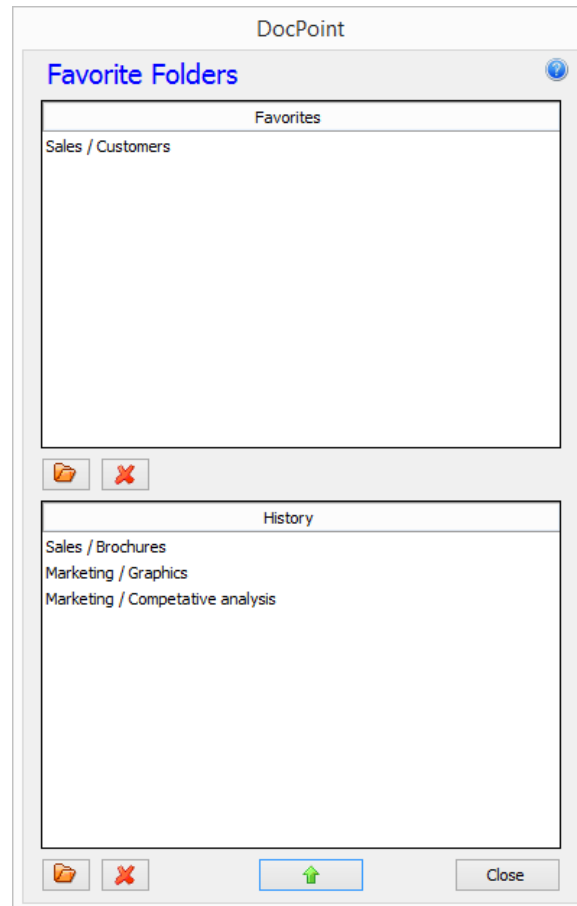




- To open a document double click on a document name or press the  button.
- To open the document's card select the document and press the  button.
- To remove a document from a list select the document and press the  button

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  button.



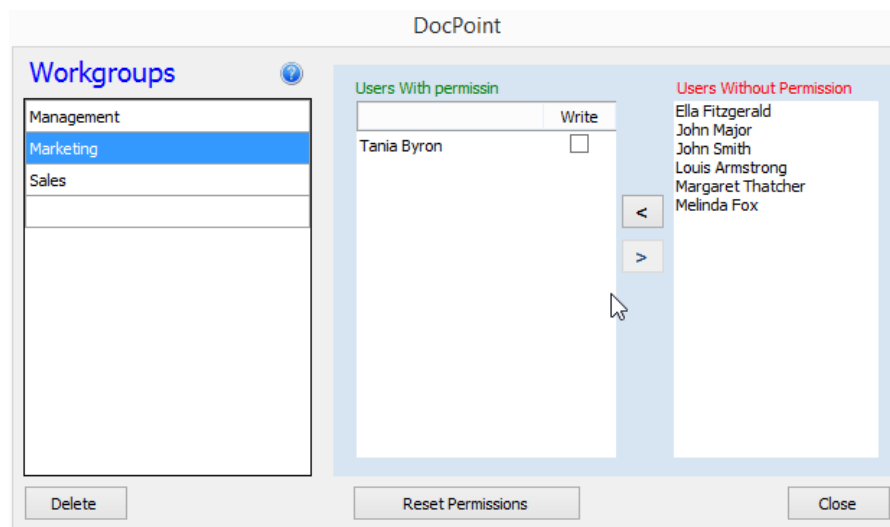
- To open the Folder for search select the Folder and press the  button.
- To remove a Folder from a list select the Folder and press the  button

Tools

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.



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.

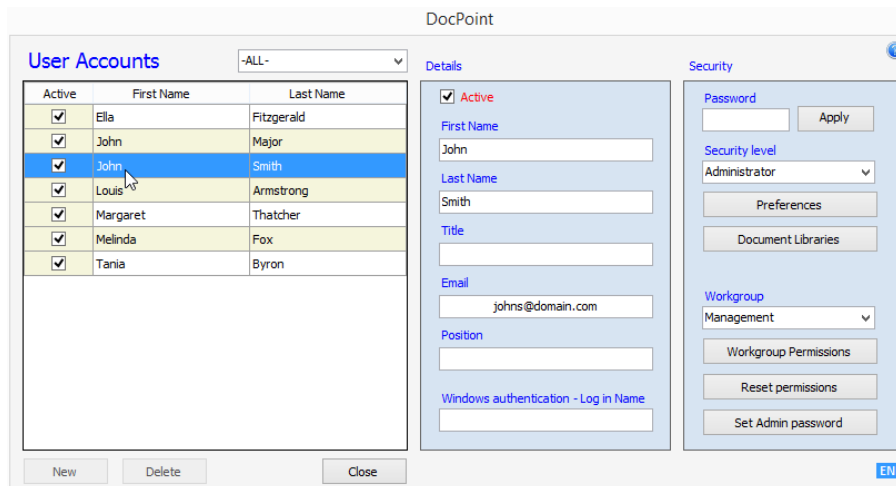
Assign Permissions

- 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 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



Create a new user

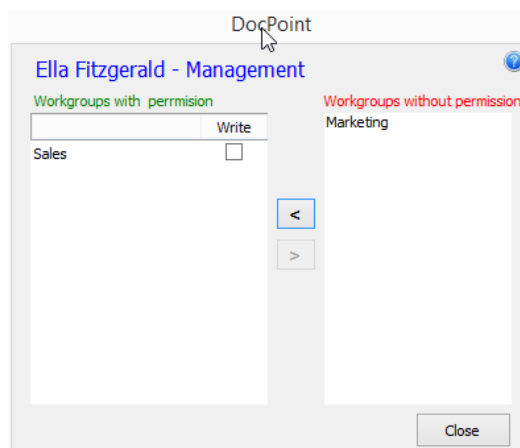
- Press the **New** button.
- Type the details of the new user in the **Details** panel.
 - The user status is by default **Active**. An Inactive user cannot log to DocPoint. A user is usually made Inactive when he leaves the organization.
 - To allow Windows Authentication of the user, type his Windows Domain Log in name. (e.g davidk)
 - Type a password and click **Apply**.
 - Select the **Security Level** for the user.
 - Press the **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)

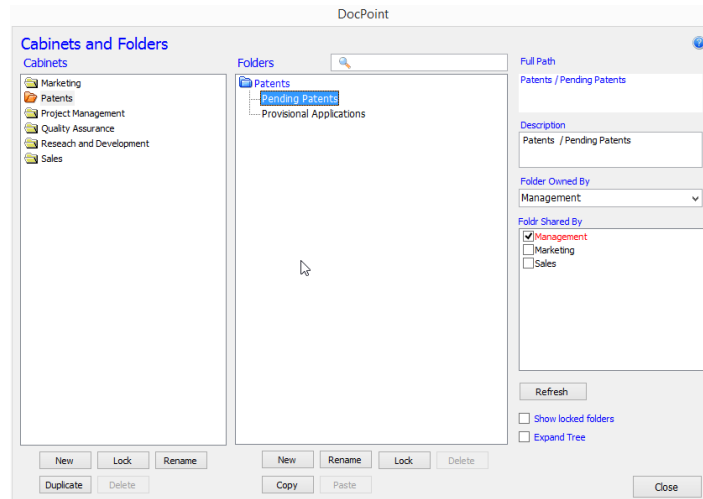
- Select the user's **Workgroup**.
- Press the **Workgroup Permissions** to assign, if necessary, permissions to other workgroups. Select the Workgroup/s and click the < button to assign permission, or the > button to revoke it.



- 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)

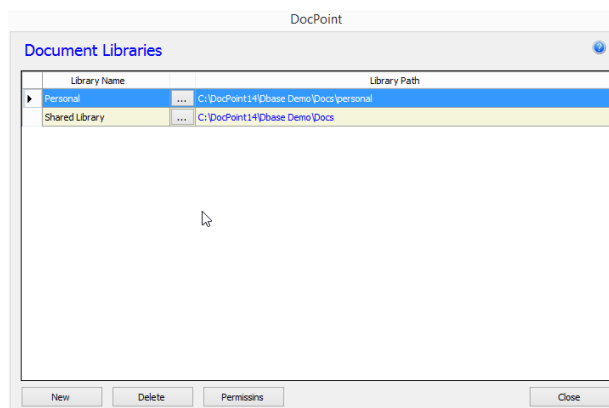
- Select the Workgroup that owns the Folder.
- The Folder can be shared by other Workgroups. Check the Workgroups that are allowed to share this Folder.

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.



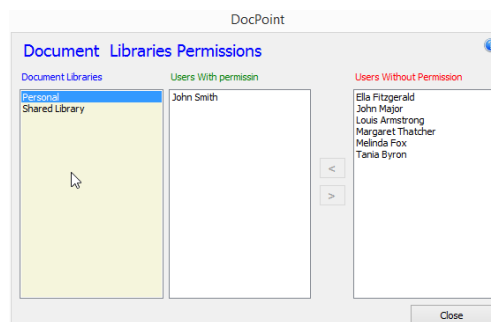
- To create a new Library, press the **New** button.
- To edit the library's path press on the button.
- To delete a Library press the **Delete** button. A Library containing documents cannot be deleted.
- To set access permission, press the **Permissions** button.

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.

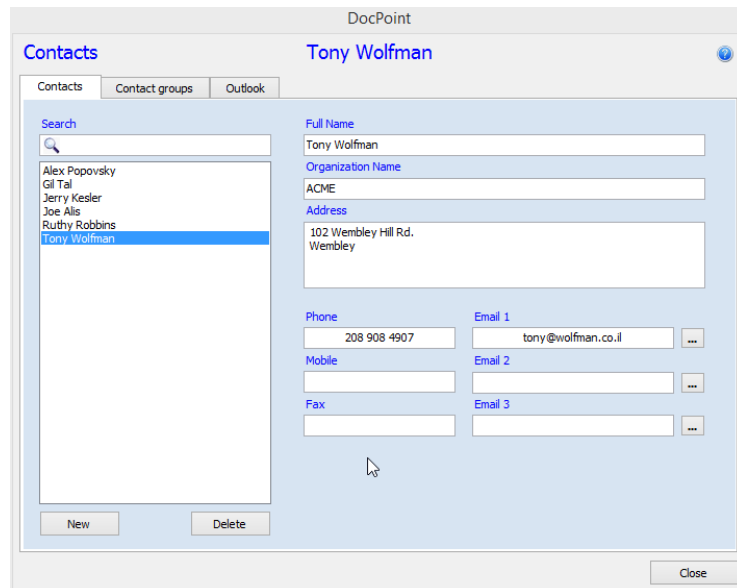


- Select a Library from the list.
- Move users between the **Users With Permission** and **Users Without Permission** list by pressing the and buttons.

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



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.

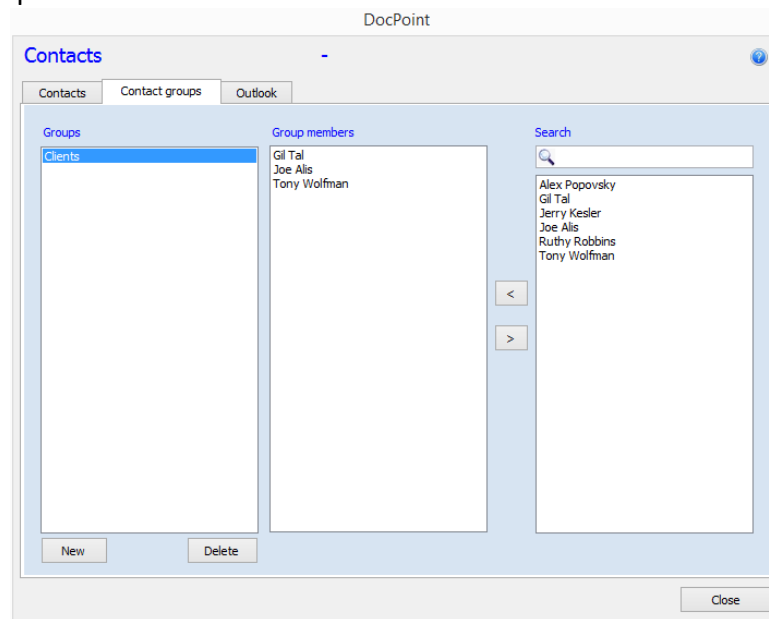
Delete a Contact

- 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




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

- Select the group.
- 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

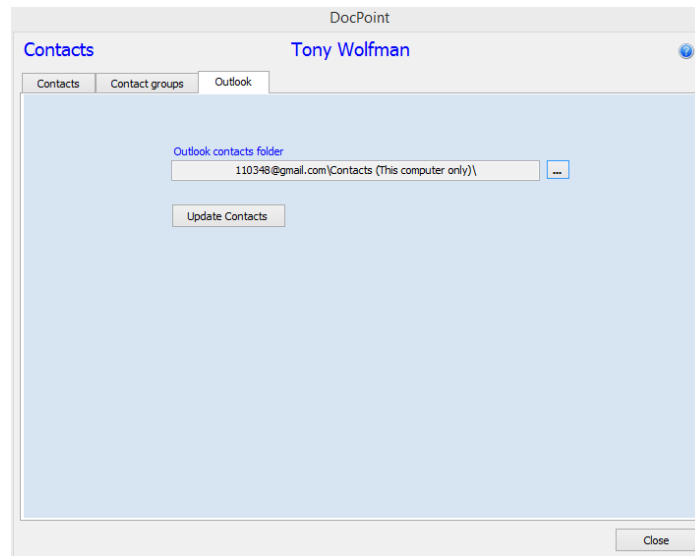
- Select the group.
- Select from the list of group members the contacts to remove to from the group and press the  button.
- Double click on a group member to remove from the group.


Delete a group

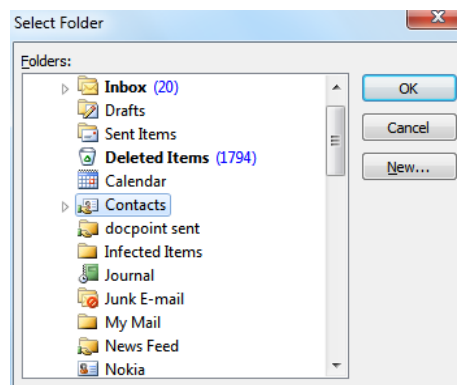
- Select the group.
- Press the **Delete** button.

Importing Contacts from Outlook

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



- Press the  button. An Outlook window opens.



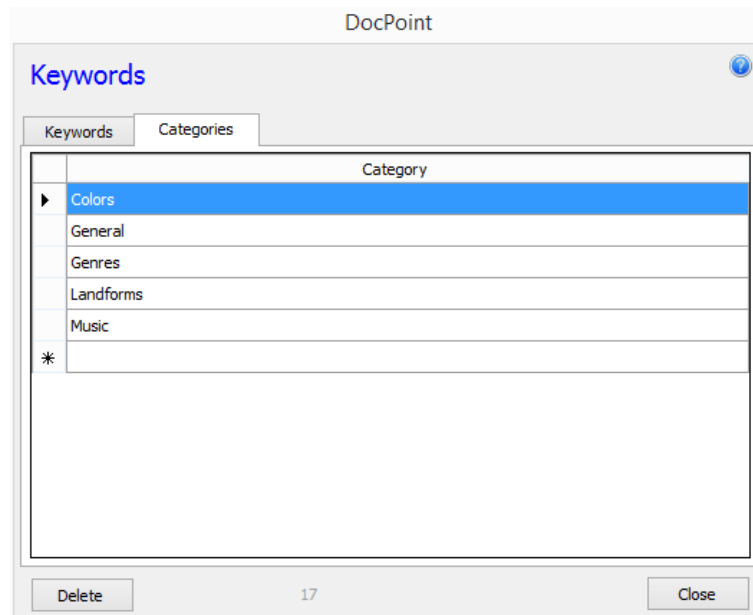
- Select the contacts folder to import and press the **OK** button.
- Press the **Update Contacts** button.

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.

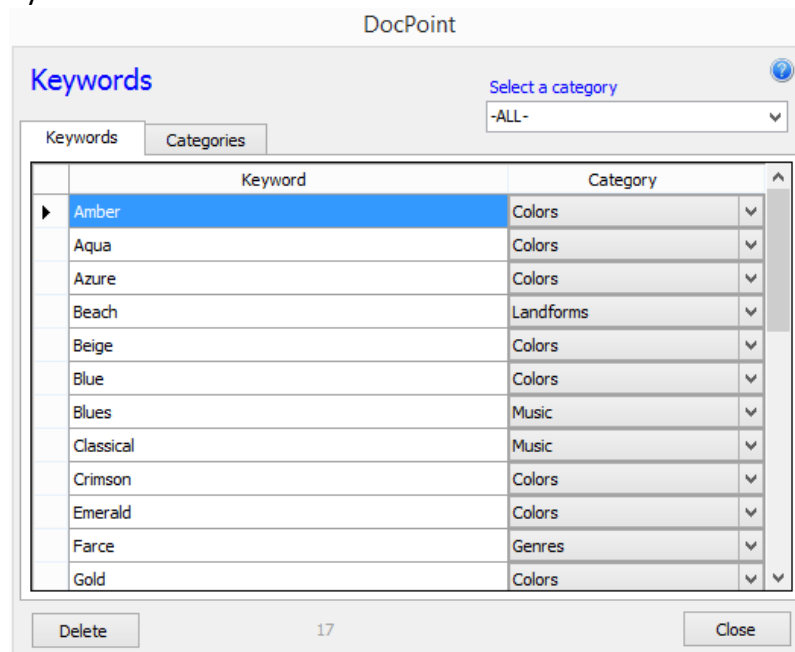
That's great for organizing personal data, but it goes even further when someone else in your organization classifies documents or emails with the same keywords. You begin building a collaborative repository of related information, driven by the same flat-based keyword scheme.



Keywords are grouped in 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



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

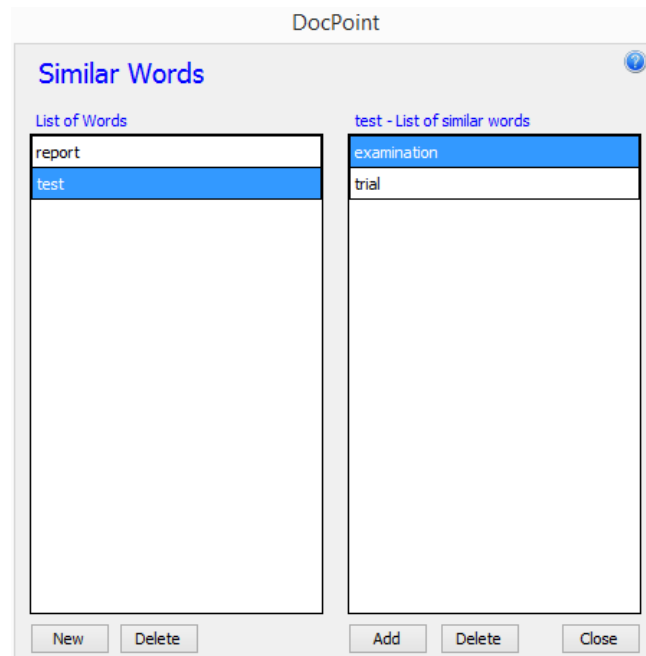
- Select the keyword and edit it or change its category by selecting another one from the drop down list.

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.



Add a new word

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

Define similar words

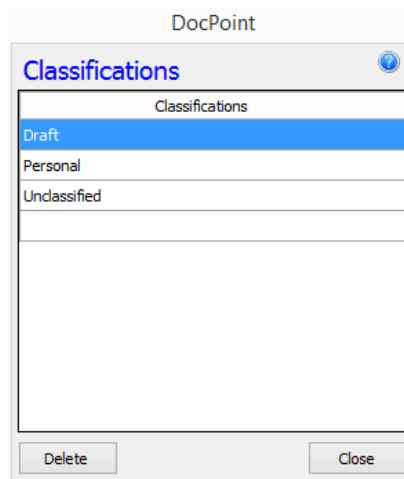
- Select a word in the **List of Words**.
- Press the **Add** button and type a similar word.

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.



- 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.

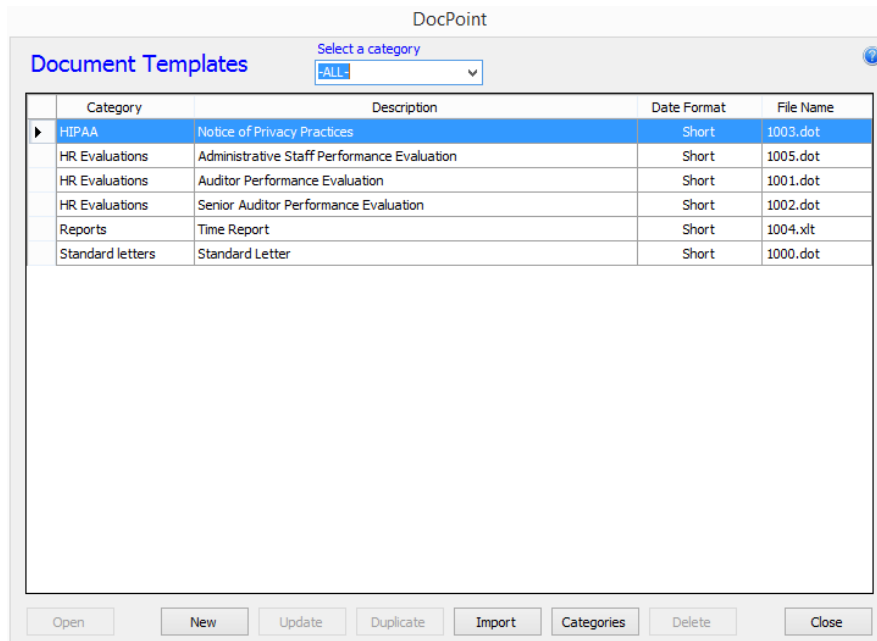
Document Templates

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.

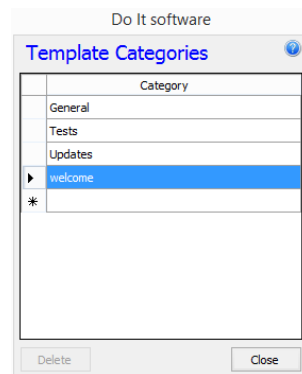
Working with DocPoint templates:

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



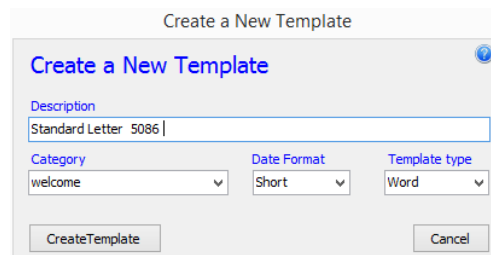
- Templates are organized by logical categories.
To manage the categories press the [Categories](#) button.
- To create a new template, press the [New](#) button.
- To edit a template, select the template and press the [Update](#) button.
- You can create a new template based on an existing one.
To duplicate a template, select the template and press the [Duplicate](#) 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 [Smart Template](#) press the [Update](#) button and add Bookmarks.

Template Categories



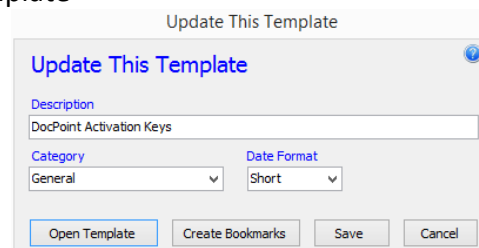
- To create a new Category, select the last empty row and type the name of the new category.
- To edit a Category, select the row and edit the name of the category.
- To delete a Category, select the row and press the Delete button. A Category containing templates cannot be deleted.

Create a new template



- 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



- 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

- 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.

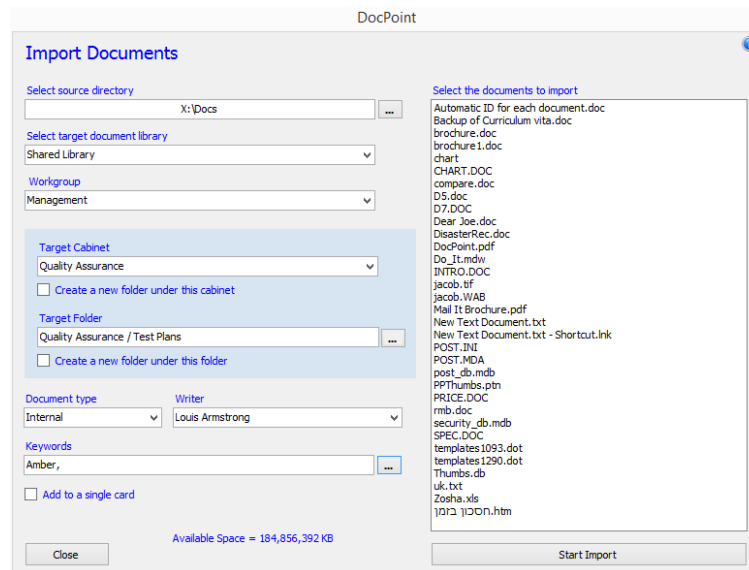
When DocPoint creates a document based on this template the result looks like this:

List of Bookmarks

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.

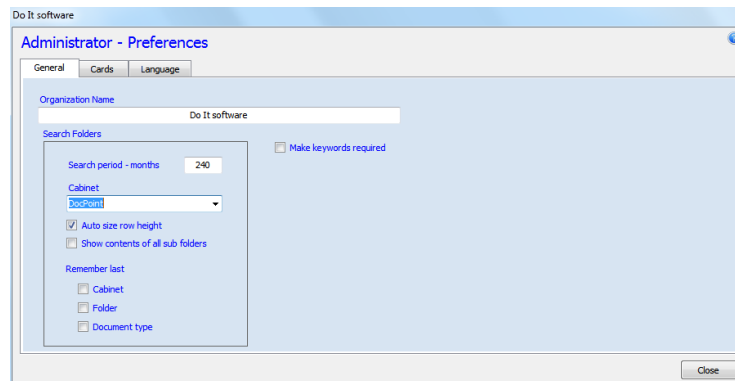


- Press the button to select the **Source Directory**. In the right box a list of all files contained in this directory are listed.
- Select from the combo box the **Target Document Library**.
- Select from the combo box the **Target Cabinet**. If you check **Create a new folder under this cabinet** 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

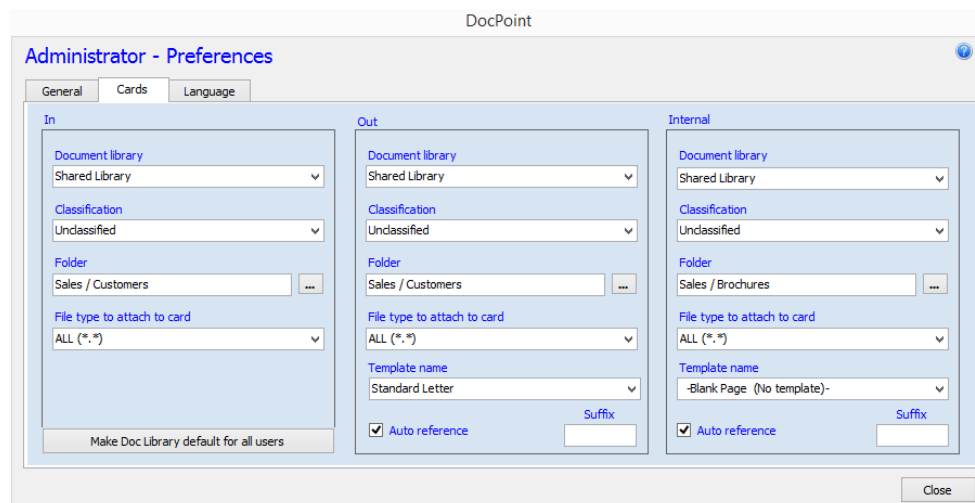
DocPoint preferences allow you to configure document creation and search defaults and general system settings. DocPoint preferences are grouped in three sections;

General settings



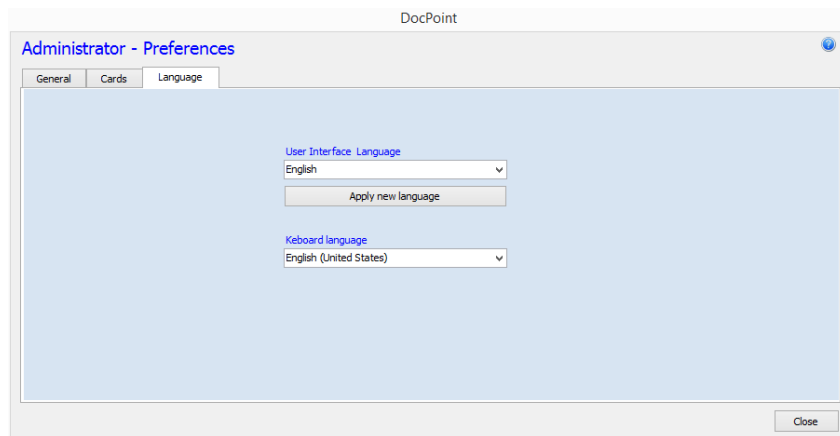
- **Organization Name** - Type your organization's name.
- **Search Period** - Define the default date range for document search results.
- **Cabinet** – Select the default Cabinet when starting the Folders search.
- **Auto size row height** – Check to show in Folder search the full content of each row.
- **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



- Define the default settings for each card.

Language



- 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:

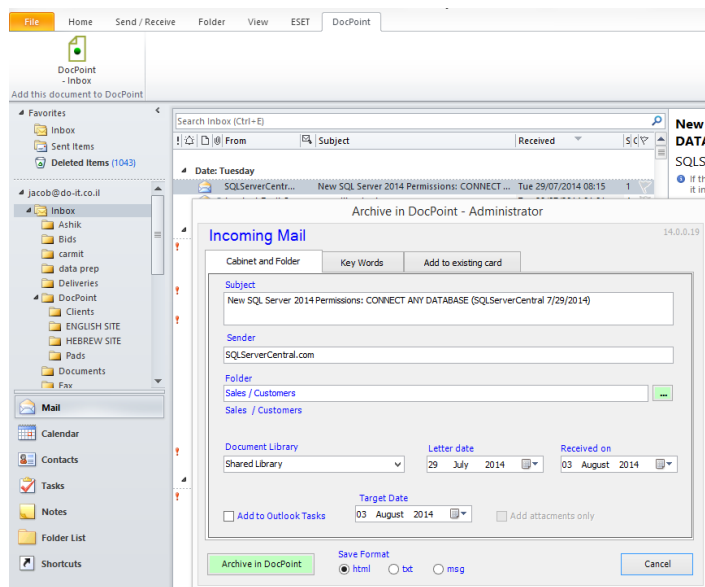
Outlook, Word, Excel and Power point connectors for Office. Windows Explorer connector for the file system.

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

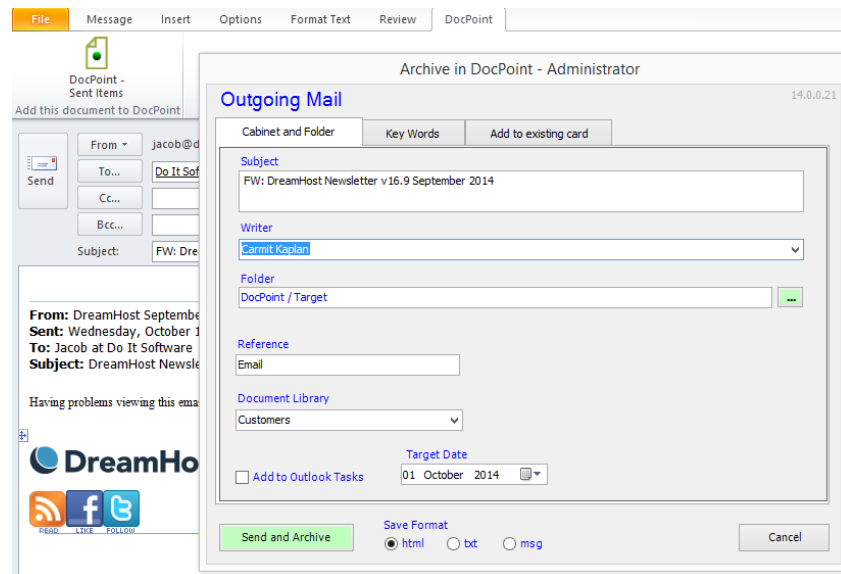
To add an incoming mail to DocPoint, select the DocPoint tab in the Ribbon and press the DocPoint item to open the **Incoming Mail** card



- **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.



- **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.

- Type the **Subject** of the document.

You can modify these fields as necessary.

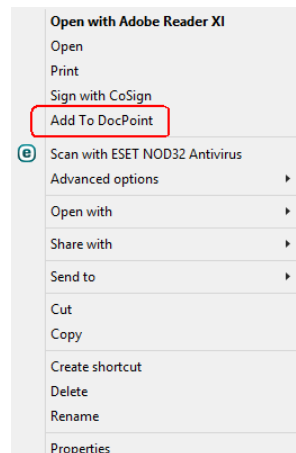
- **Writer** is by default is the user's name.
- **Document Library** is the default Library set by the **Preferences**.
- **Folder** is the default Folder set by the **Preferences**.
- You can create a Task in Outlook by checking the **Add to Outlook Tasks** checkbox and set a **Target Date**.
- [Add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



This will open the **Internal Document Card**.

The 'Internal Document Card' dialog box is shown. It has a title bar 'Archive in DocPoint' and a version number '14.0.0.7'. The dialog is divided into three tabs: 'Cabinet and Folder', 'Key Words', and 'Add to existing card'. The 'Cabinet and Folder' tab is active. It contains the following fields:

- Subject:** docpoint 14 manual
- Writer:** John Smith (dropdown menu)
- Document Library:** Shared Library (dropdown menu)
- Cabinet:** Sales
- Folder:** Sales / Brochures (text field with a browse button '...') and Sales - Demo etc (text field)
- Target Date:** 03 August 2014 (calendar icon)
- Add to Outlook Tasks

 At the bottom, there are two buttons: 'Archive in DocPoint' (green) and 'Cancel' (grey).



You can modify the fields as necessary.

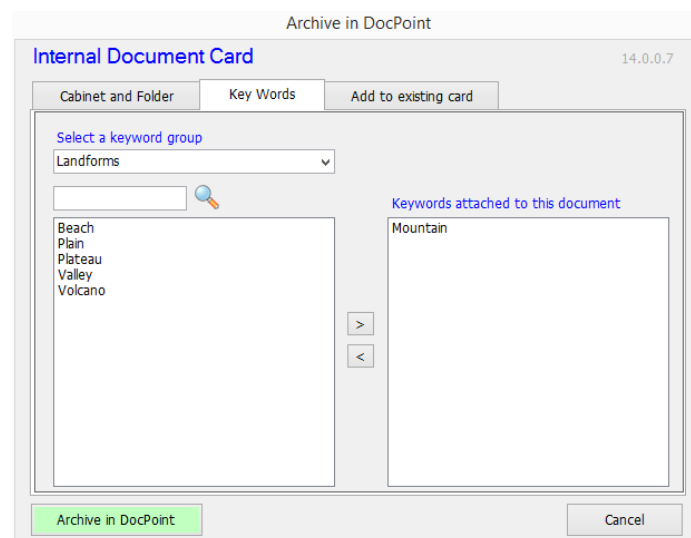
- **Subject** is by default is the name of the file.
- **Writer** is by default is the user's name.
- **Document Library** is the default Library set by the **Preferences**.
- **Folder** is the default Folder set by the **Preferences**.
- You can create a Task in Outlook by checking the **Add to Outlook 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  button.
- To remove a keyword from the list, select it and double click or press the  button.



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.

