DOCSVAULT™

Document Management Software

PROFESSIONAL EDITION v1.2

Scan it   *Manage it*   *Secure it*   *...it's effortless*

QUICK START GUIDE

Easy Data Access

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Thank you for selecting Docsvault Professional Edition

Easy Data Access offers you a powerful and user-friendly document management software. Perfect for the individual user, Docsvault is loaded with innovative features like:

- Incredibly Easy-to-use Interface
- Customizable File and Document Organization
- Encrypted Document Security
- Integrated Scanning Support
- Integration into Microsoft Office
- Built-in PDF Writer
- Complete Data Backup Solution

Welcome to Docsvault!

Main Features

1. Easy to Use Interface

- Docsvault has a look and feel similar to Windows Explorer. Its drag-and-drop functionality is virtually identical to that of Windows Explorer, making Docsvault a program you will be comfortable with immediately and with little effort.
- You can drag-and-drop files and folders from within the application or from any readily-accessible external source, making importing files incredibly simple.
- Docsvault has a simple Cabinet type filing structure. This facilitates the organization of your documents in a way that suits you best.
- Files and folders can be dragged and dropped within Docsvault, as well as between Docsvault and locations in your local computer.
- Docsvault can also help prevent costly unintentional deletions through its built-in *Recycle Bin*, allowing you to recover accidentally deleted files and folders.

2. Manage All Types of Files

- Docsvault can manage both paper files and computer generated files in an efficient manner.
- Scan in your hard documents and create PDF's.
- Documents stored in Docsvault can also be exported to CD/DVD or any other external folder in a local or network drive

3. Document Security

- Secure all the important documents in *Safe Docs* cabinet within *Safevault* ensuring the best available protection
- *Safevault* uses 128 bits strong encryption methods to ensure absolute safety of your information
- It is impossible to break into the Safevault without the proper password. Once the *Safevault* is locked, it is practically not possible to break into it, not even by us
- Use the password recovery features like "Secret Question and Answer", "Password Recovery Disk"
- Secure all your valuable paper documents by scanning them directly into the Safevault or import important files into the Safevault

4. Microsoft Office Integration

- Docsvault seamlessly integrates itself into Microsoft Office applications such as Word, Excel, Outlook, and PowerPoint.
- Save your files from the File menu of any of these MS Office applications directly into Docsvault.

5. Find Documents Quickly

- All text based files imported or created in Docsvault are indexed by text, allowing you to search documents by text within the documents themselves.
- Apart from searching by the usual criteria like file name, description, size, and creation date, you can also search for files and documents by the custom profiles, properties, and notes that you have created. Document searching and retrieval has never been this effective.
- Our unique Save Search feature allows you to save frequently used search parameters, saving you even more time when it comes to retrieving your documents.

6. Effortless Document Backup

- Backup your documents effortlessly with just a few clicks of your mouse.
- Directly backup to CD or DVD media. Docsvault also allows users to change their preferences to allow for direct burning. Simply right click and select burn, and Docsvault will immediately begin the burning process.
- In case of OS or hardware crash, Docsvault allows you to restore documents with a few clicks and be up and running in no time.
- The structure of your filing is completely retained in your backup, even if you don't have Docsvault.

7. Manage Tasks Efficiently

- Never miss an important task again with Docsvault's built-in task manager.
- Set reminders for yourself that will popup at specified times, whether it be once or repeated with daily, weekly, monthly, or yearly intervals.
- Task filing – once tasks are marked as done, old tasks can be archived under 'filed tasks'.

8. Integrated Scanning Support
- Paper documents can be seamlessly scanned and turned into digital files through Docsvault's built-in scanner interface and then saved directly in any desired Cabinet, Drawer, or Folder. This incredibly simple interface will change the way you view file scanning.
- You can save your scanned documents as multi-page PDF or TIFF files, along with various other popular image formats.
- Docsvault scanner interface works with all TWAIN and WIA compliant scanners.

9. Password and Information Manager
- Store and manage all of your passwords in the ultra-secure *Safe Info* drawer in the *Safevault*, which also utilizes our solid 128-bit encryption.
- Our built-in organizational templates make organizing your usernames and passwords incredibly easy.
- You can save all of your important information regarding banks, credit cards, email accounts, and other valuable information with worry-free confidence.

10. Profile Documents
- Properties are custom descriptive classes that can be created and assigned to anything brought into or created in Docsvault.
- Each property has the ability to have a unique name, description, and data type (text, numeric, date).
- Once properties are created, commonly used properties can be grouped into profiles. Multiple profiles can be made and each can have a unique set of properties.
- Once created in the options menu, these profiles can be assigned to anything in Docsvault, including individual files, folders, and cabinets.
- Individual properties within each profile can be unselected, allowing full customizability of each profile application.

11. Audit Trail
- This feature provides a logbook of events and changes that have occurred to your documents and settings. It keeps track of changes to specific files, folders, and cabinets by filename, username, event time, event type, or file path. It even tracks changes made to settings and preferences.
- Audit trails can be turned on or off for any file, folder or cabinet.
- Multiple field filtering within the Audit Trail allows you to find specific events by filtering and sorting with regards to filename, username, event time, event type, or file path. These can be further filtered within the results themselves.

12. PDF Creator
- Create PDF files from any document instantly by issuing *'Print'* command from the **File** menu of any application.
- Instead of printing on conventional physical printer, the document is redirected to Docsvault's 'PDF printer' to be printed as a PDF file

Specification

The following are the minimum and recommended specifications to run **Docsvault Professional**:

Requisite	Required Minimum	Recommended Minimum
Processor	Pentium 500Mhz	Pentium III
Memory	128 MB RAM	256 MB RAM
Graphics Display Resolution	800*600	1024*768
Operating system	Win 2k	Win 2k, Win XP
.NET Framework	Version 1.1.4322	Version 1.1.4322

> **The Microsoft .Net Framework is available for free from their download center website**. **Once on their website, look for the ".NET Framework Version 1.1 Redistributable Package"**
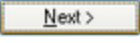
Step 1 - Initiate Installation Wizard

This section describes how to install Docsvault Professional Edition on your computer running Microsoft Windows 2000 or higher. To install Docsvault Professional properly, you must have administrative rights.

Insert the CD in your CD/DVD Drive. After a short moment, the **Installation Wizard**'s welcome menu should automatically appear.

Click on [Next >] to view the **License Agreement** page.

Step 2 - License Agreement

Shown below is the **License Agreement** page.
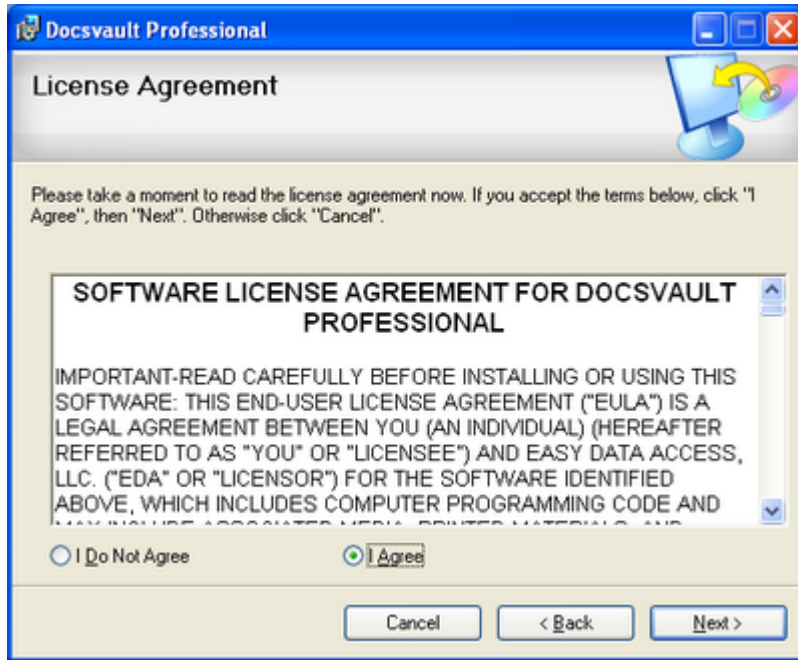
Read the License Agreement carefully. If you agree with it, click on the *I Agree* radio button and click Next >.
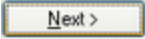
Step 3 - Select Installation Folder

Shown below is the **Select Installation Folder** page.
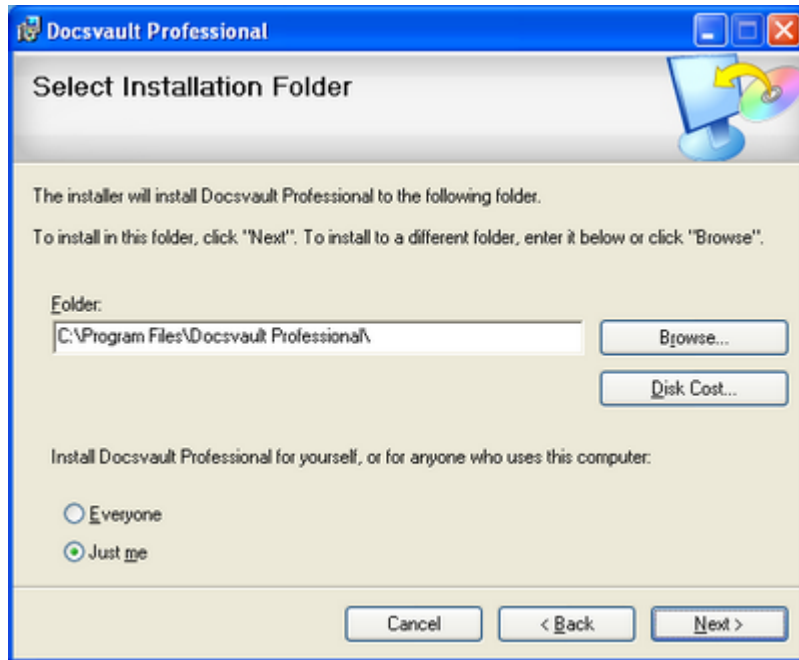
- A default path for installation is automatically chosen. You can select a different location by clicking on [Browse...]
- Clicking [Disk Cost...] gives you statistics of the total disk space available in the local drive and the required space by Docsvault. Accordingly, you can decide the appropriate drive for the installation of Docsvault.
- At the bottom you will find 2 radio buttons:
  - Select *Everyone* if you want to install the software for all Windows users
  - Select *Just me* if you want to install the software only for you

Click on [Next >] to go to the **Confirm Installation** page.

Step 4 - Start Installation

Confirm Installation page is confirmation before you start installing Docsvault Professional. In case you want to change the installation location, you can go back and revise the destination.
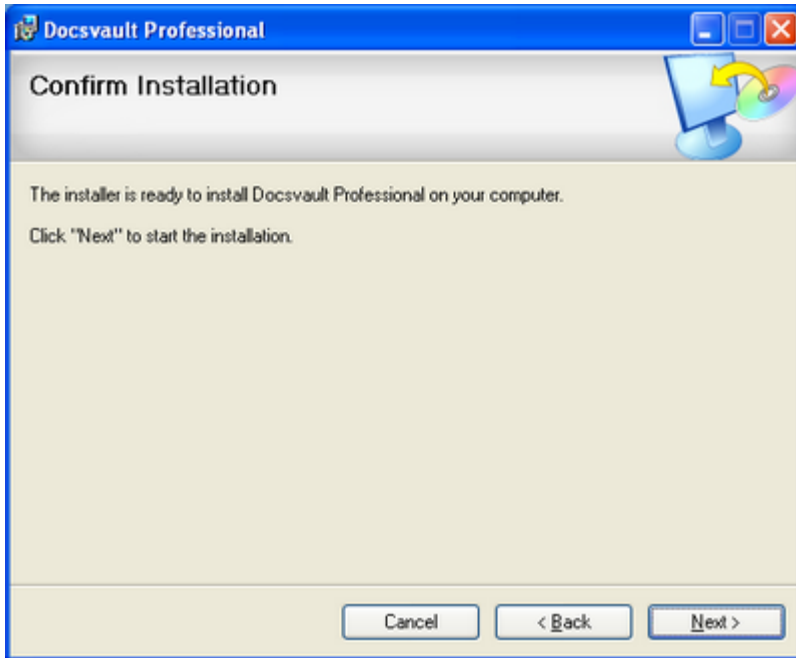
If you are sure about installing Docsvault, click [Next >] to start the installation process.
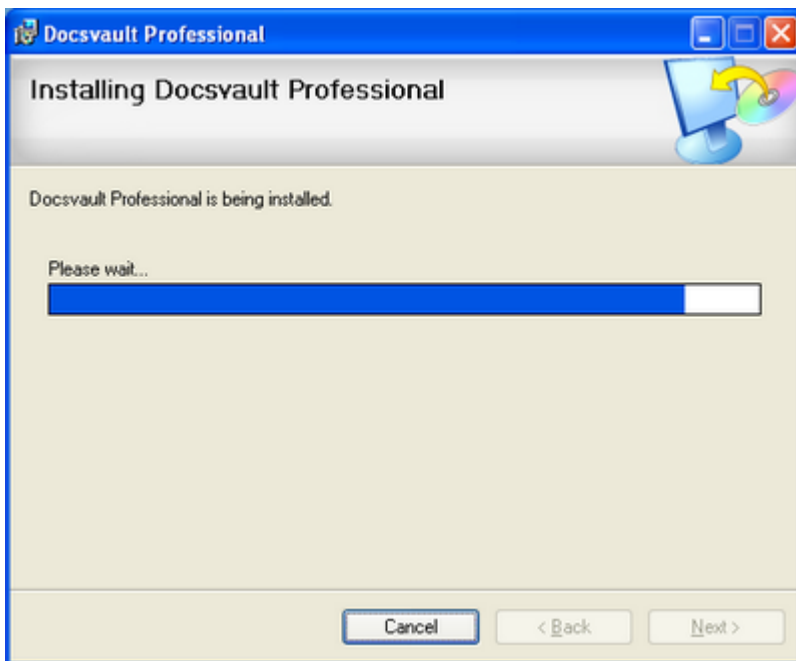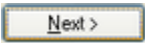
Step 5 - Select Data Folder

During the installation procedure, you will be asked to select a destination folder. **Docsvault Data** is the default folder where Docsvault will save your documents. By default, Docsvault selects the **C: Drive.**

You can select a different path by clicking on Browse
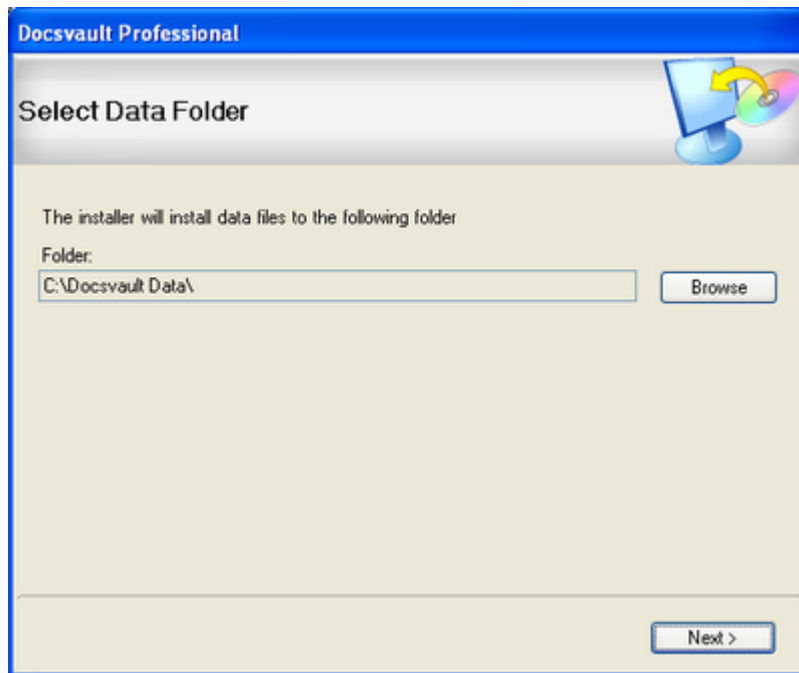
Click on Next > when you are done with choosing the *Docsvault Data* path.

Step 6 - Close Installation Wizard

On completion click [Close] .
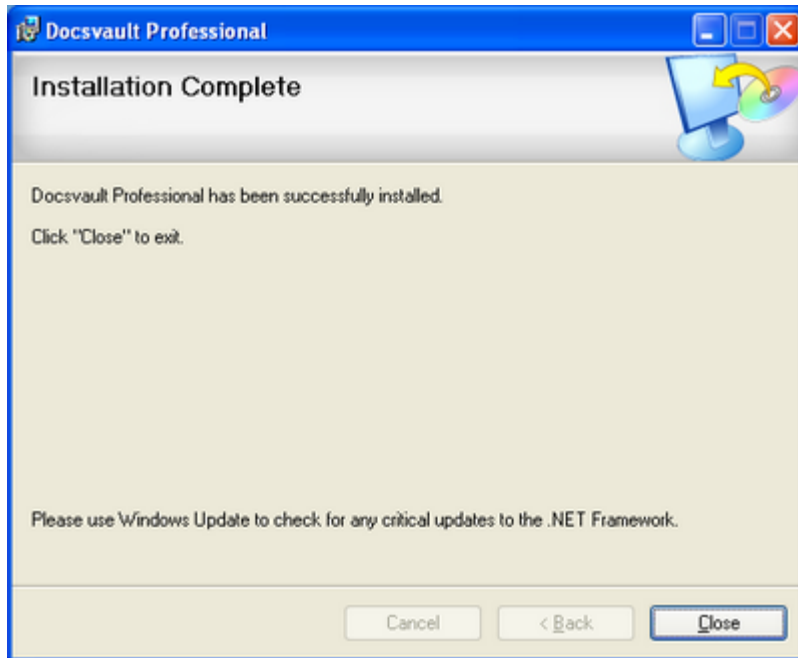
You are now ready to use Docsvault Professional Edition!

Launching and Registering Docsvault

Before learning about all of Docsvault's features in detail, you need to get introduced to the Docsvault user interface. The first and foremost thing is to get the Docsvault Professional interface on the screen. The next topic will cover several ways of launching the Docsvault application. You will also be introduced to Docsvault's main window. After that, you will learn the basic operations like how to create cabinets and folders, importing-exporting files, searching documents, etc.

Launching Docsvault Professional

You can launch the Docsvault application in one of the following ways:

- **Using Windows Start menu:** Click on *Start >> Programs >> Docsvault Professional*

<div align="center">*Or*</div>

- **Using Desktop Icon:** Double click on 'Docsvault Professional' icon on the Desktop.

<div align="center">*Or*</div>
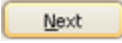
- **Using System Tray Icon:** By default Docsvault Professional will automatically start up in the system tray when Windows starts up. You can display the main window by double clicking on this system tray icon shown below.

Registering Docsvault

1. The first time you launch Docsvault, you will be presented with a registration form as shown below:
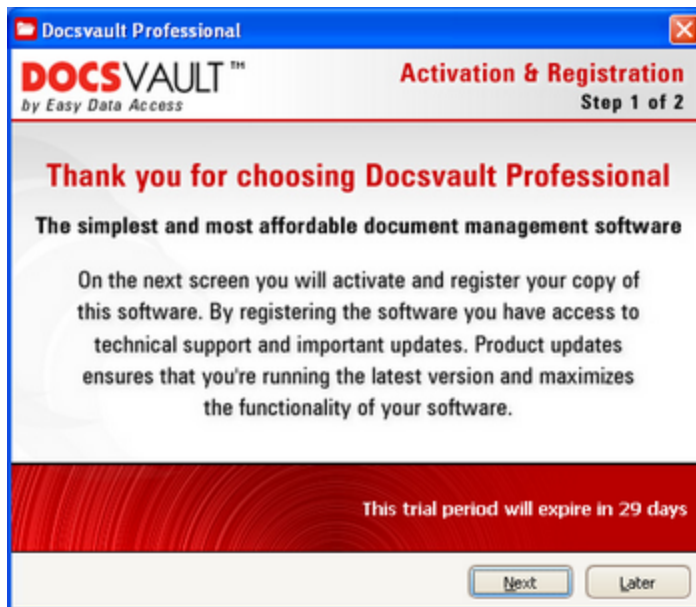
2. Click on to view the next page of the registration form.

Enter the 25 character *Activation Key* provided with the retail box you have purchased. If you purchased Docsvault online, we will be sending you an email with the *Activation Key*.

Please provide the required information.

Note: You must provide a valid email address, as the technical support team will respond to your emails only when sent from this email address.

Read the **License Terms** by clicking on the blue hyperlink and, if you agree with it, check the adjacent box.

Now, log on to internet and click on [Activate]. This will activate your copy of Docsvault Professional Edition by registering it in our server.

Docsvault Explorer

The look and functionality of Docsvault is very similar to Windows Explorer. It presents a hierarchical structure of cabinets, folders, and files. Apart from that, you can also access the files, folders, and drives on your local computer like you do in Window Explorer. You can also view *My Network Places*, which lists other computers that are connected to your local area network (LAN). You do not need to quit Docsvault in the event that you want to explore files and folders outside Docsvault. Docsvault also features simple drag-and-drop functionality for copying, moving, importing, and exporting files and folders.

The Docsvault interface also provides multiple tabs so you can search and browse different files, folders, cabinets, and drives at the same time. The multiple tabs also work as a container for **Search** results and **Task** manager

Deleted files from Docsvault are placed in Docsvault's own *Recycle Bin*. You can restore these files anytime, as long as they are not removed from the *Recycle Bin*.

Shown below is the Docsvault Explorer:
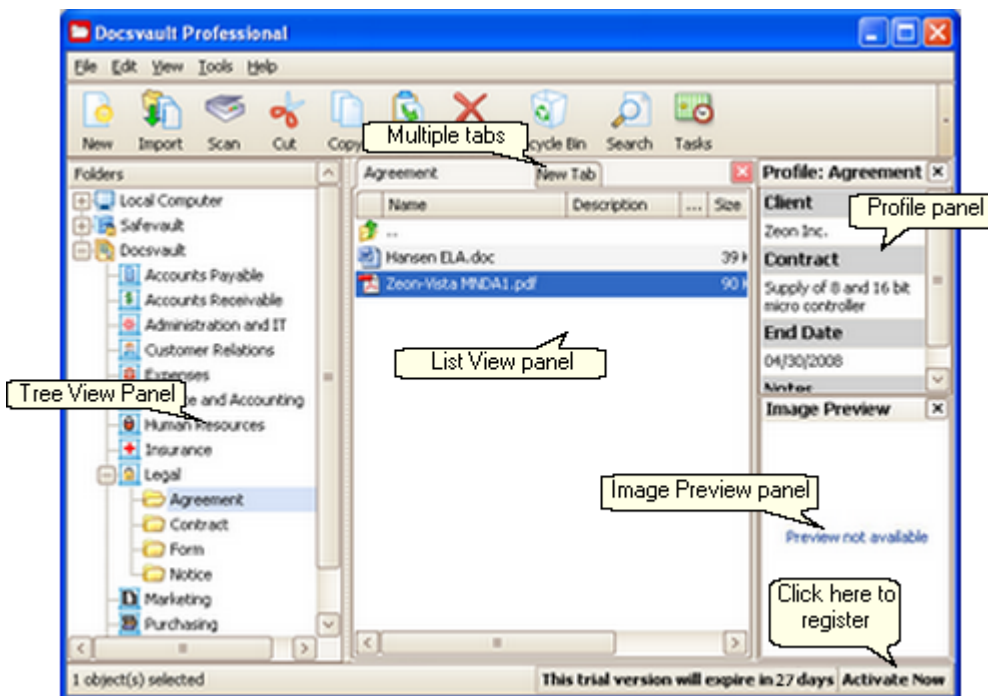
Creating Cabinets and Folders

Let us begin by demonstrating the creation of cabinets and folders:

Creating a New Cabinet

1. Select Docsvault from the tree view window:
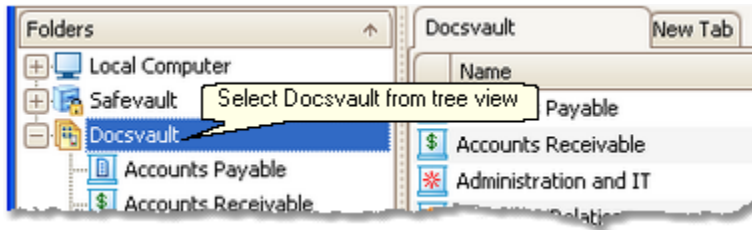
2. From the menu, click on *File >> New Cabinet* to display the 'New Cabinet' dialog box as shown in the figure below:
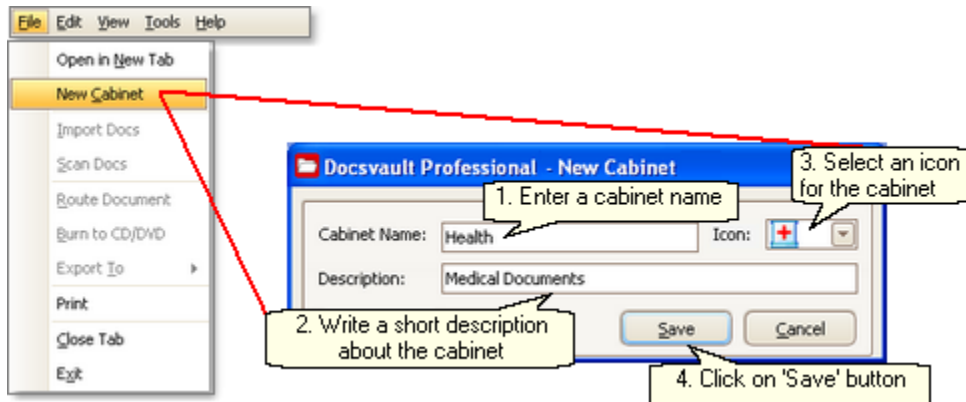
Let's assume the new cabinet will be named *Health.* It gets created as shown in the figure below:
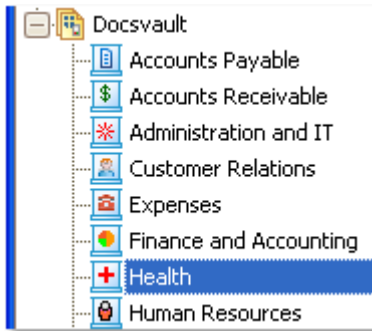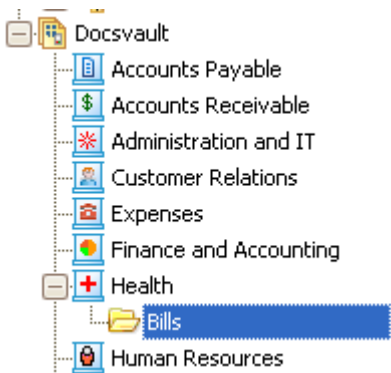

Creating a New Folder

1. Select the *Health* cabinet you just created from the tree view panel.

2. From the menu, click on *File >> New Folder* to display the *'New Folder'* dialog box as shown in the figure below and follow the three step process shown:
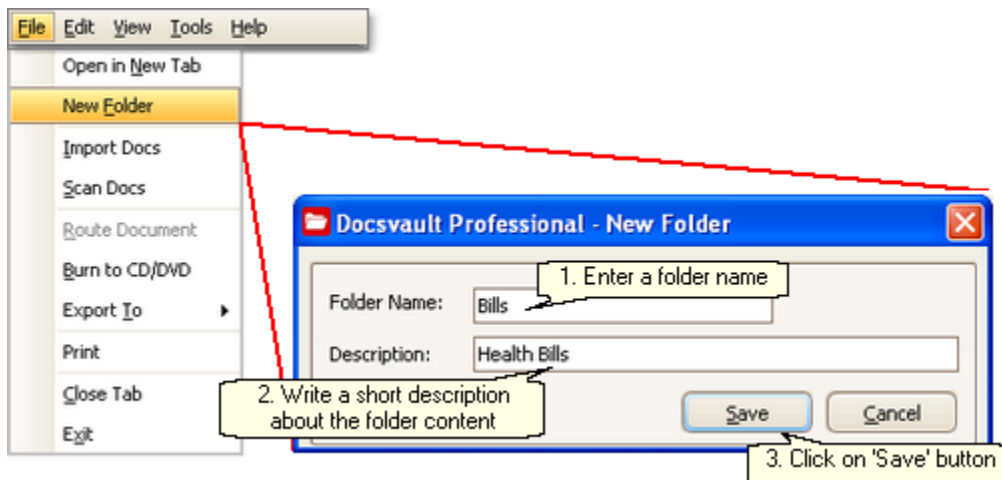
A new folder, *Bills,* **gets created as shown in the figure below:**

Likewise, you can also create sub-folders within this folder.

Importing Digital Documents

Now that you are done with creating cabinets and folders, let's demonstrate how to import documents into a cabinet or folder.

1. **Select a cabinet of folder in which you want to store the imported documents from the tree view panel of Docsvault explorer**

2. **From the menu, click on** *File >> Import Docs* **to display the file selection dialog box.**

   Select files and click on OK **. You can select multiple files by holding '***Ctrl'* **key from the keyboard and simultaneously clicking on your files.**
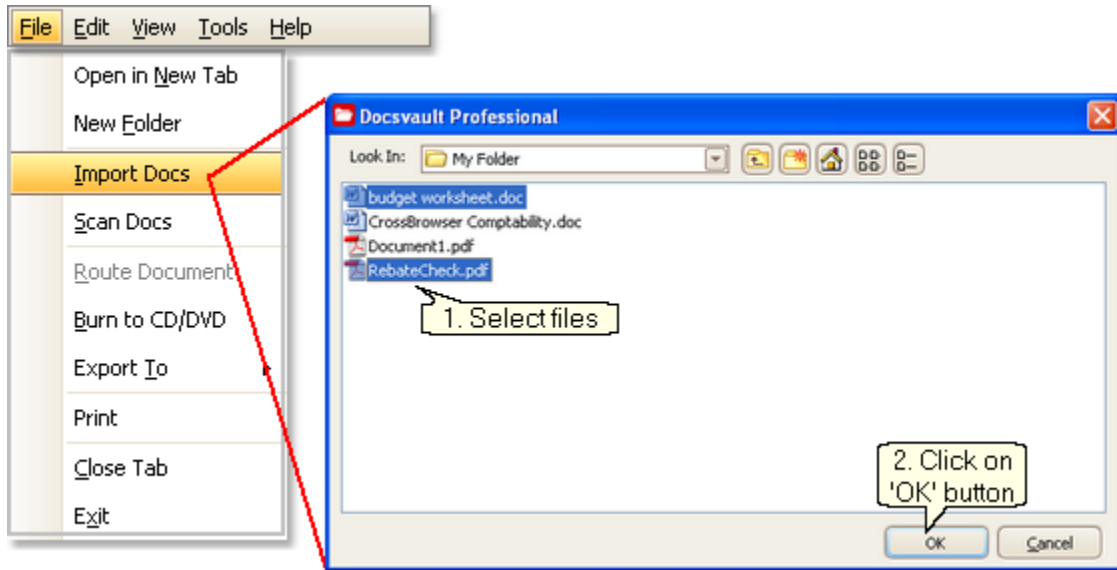
4. **Now you can see the** *'Profile'* **dialog box in which you can write a short description about the files to be imported. Click on** Import **to begin importing your files or documents.**
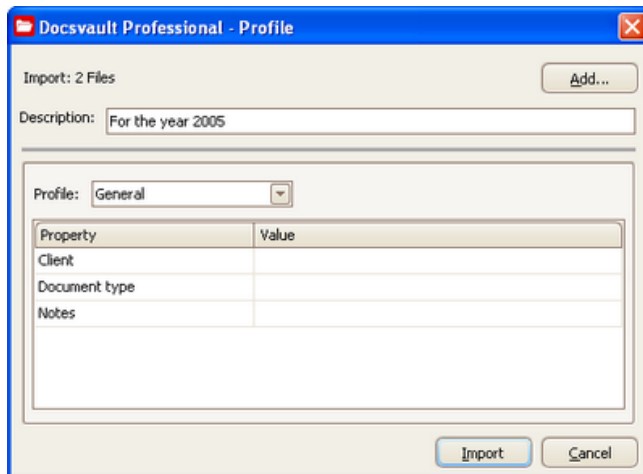
6. **You have now successfully imported documents into Docsvault!**

Scan & Save Documents

Now we will demonstrate how to scan paper documents and directly store them in Docsvault through Docsvault's built-in scanning interface.

1. Select a cabinet or folder from the tree view panel of Docsvault explorer.

2. From the menu click on *File* **>>** *Scan Docs* **to display the** *'Docsvault Scanning'* **dialog box.**
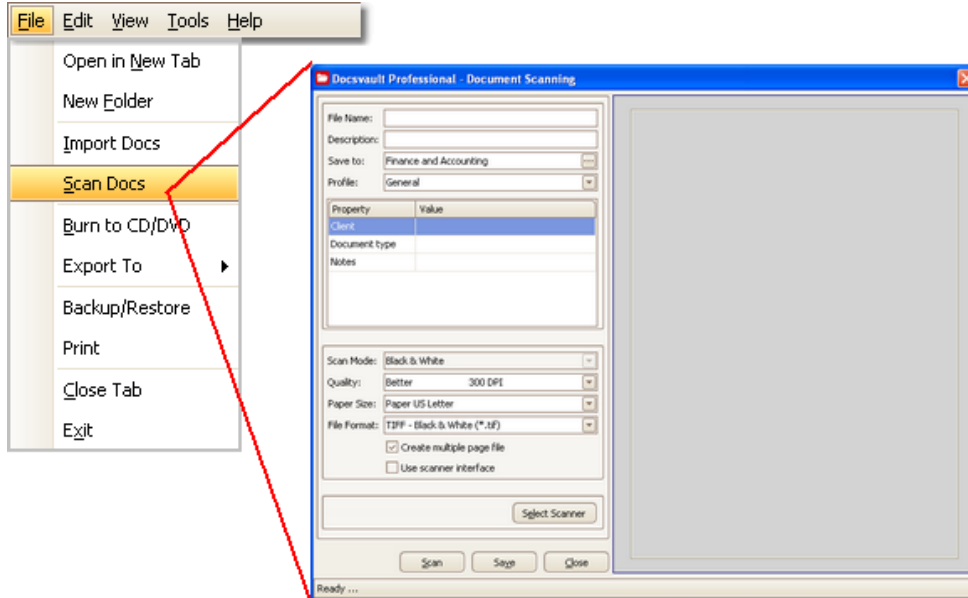
Docsvault will automatically detect and display the installed scanner driver.
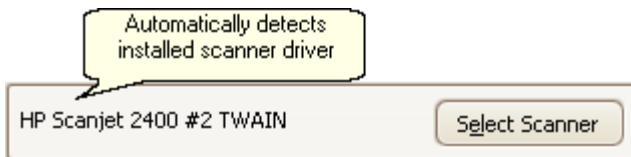
3. Enter a file name and a short description about the file to be scanned. The '*Save to*' field shows the location where the file will be saved. Click on** [...] **button to change the location. You can also assign a pre-defined profile from the** *Profile* **drop down.**
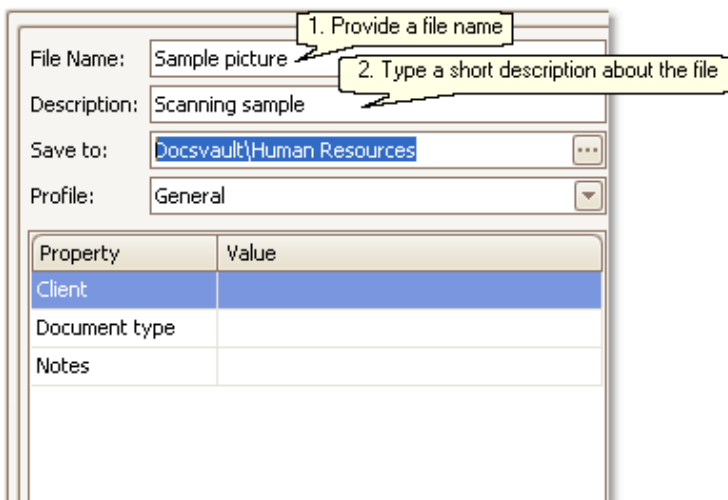
4. Choose a mode to scan in under **'Scan Mode'** and a file format under **'*File Format.*'** You may also choose the image quality and the paper size from the respective drop down menus. We have chosen *Color* from the '*Scan Mode'* drop down list and selected a *JPEG* File Format:

Scan Mode:	Color	
Quality:	Good 200 DPI	
Paper Size:	Paper US Letter	
File Format:	JPEG (*.jpg)	

☐ Create multiple page file

☐ Use scanner interface

6. Now, scan in the file by clicking on the [Scan] .

7. When the scanning is over, you get a preview of the scanned document in the preview window:
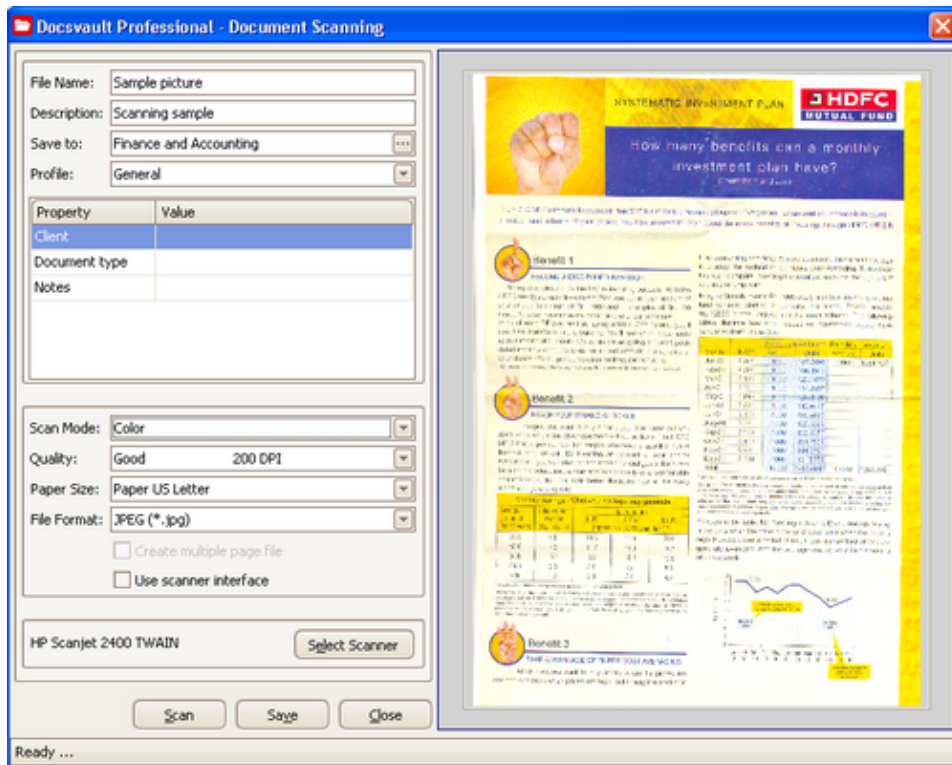
8. If you are satisfied with the image, click on the [Save] to save the scanned document.

Exporting to Folder

You can export documents, folders, or entire cabinets to any location on your computer.

1. **Select the documents, folders or cabinets to be exported from the list or tree view panel of Docsvault explorer.**

2. **From the menu click on** *File >> Export To >> Folder* **to display the '***Browse for Folder***' dialog box.**
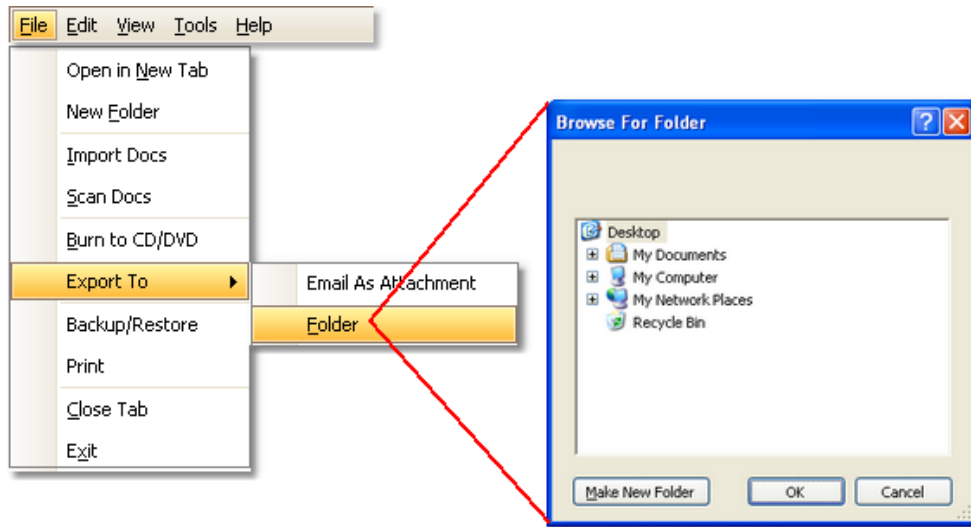
3. **Select a location from the '***Browse for Folder***' dialog box, then click on the** [OK] **to begin exporting.**

4. **All specified files have now been exported to the destination, retaining the exact hierarchical folder structure as in Docsvault.**

Note: Cabinets are exported to the destination as folders.

Exporting as Email Attachment

You can export your documents as email attachment as well.
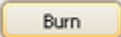
1. Select documents from the list view panel of Docsvault explorer.

2. From the menu click on, *File >> Send >> Email As Attachment.*
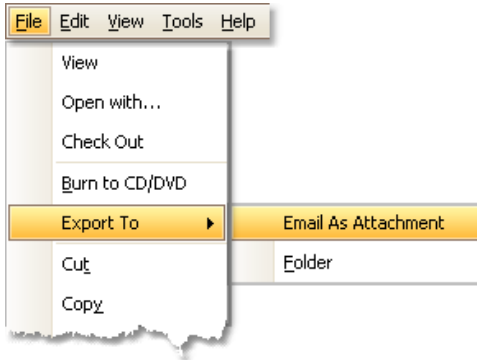
3. Email client opens the compose window with the selected document as attachment
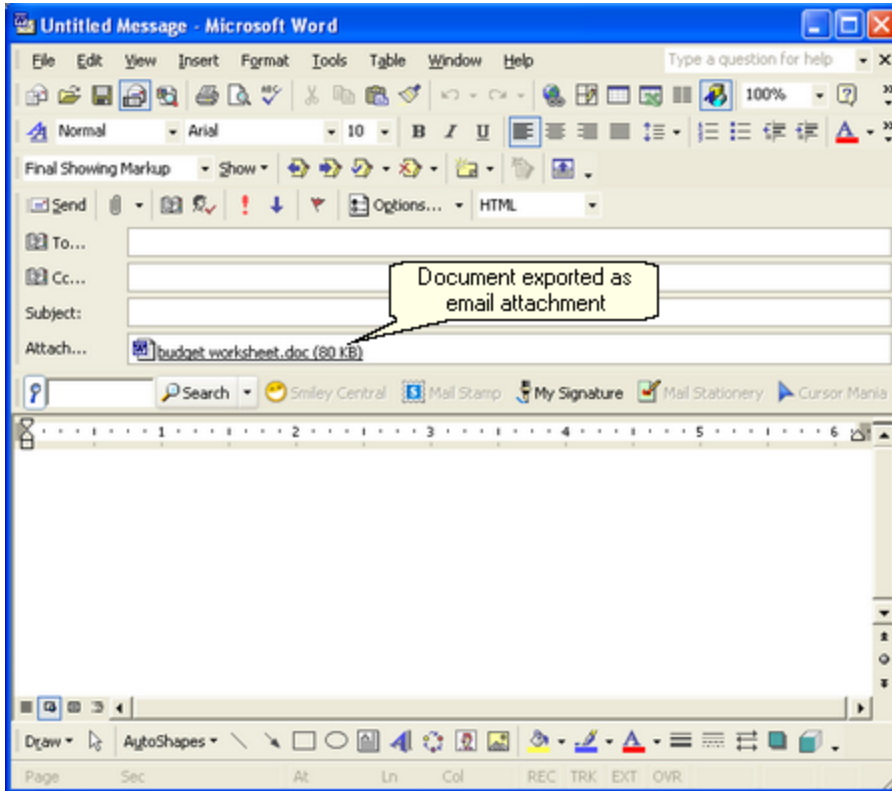
Burn to CD/DVD

1. Select one or more files from the list view that are to be burnt to CD/DVD

2. From the menu click on *File >> Burn to CD/DVD* to display 'CD/DVD Burning' dialog box. Your CD/DVD writing drive will be automatically detected by Docsvault. Select a writing speed. Now click on [Burn] .
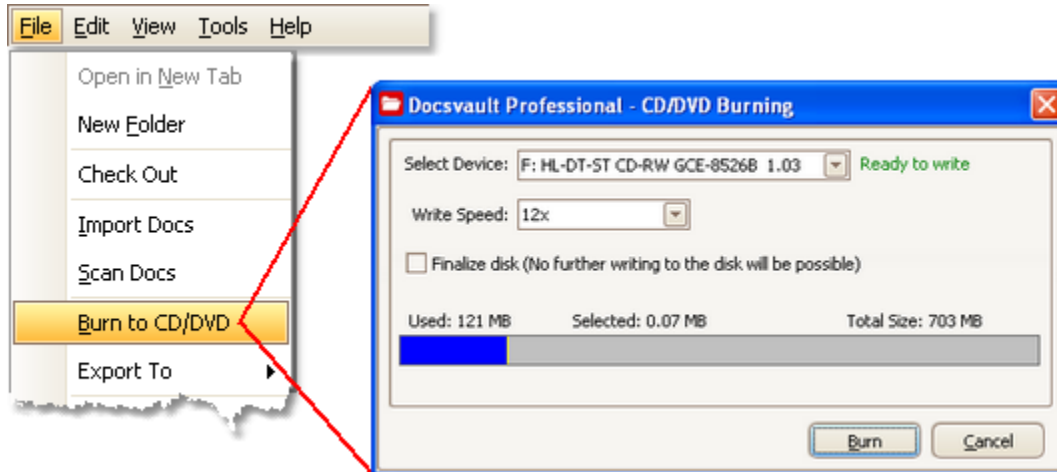
3. This starts the burn process.
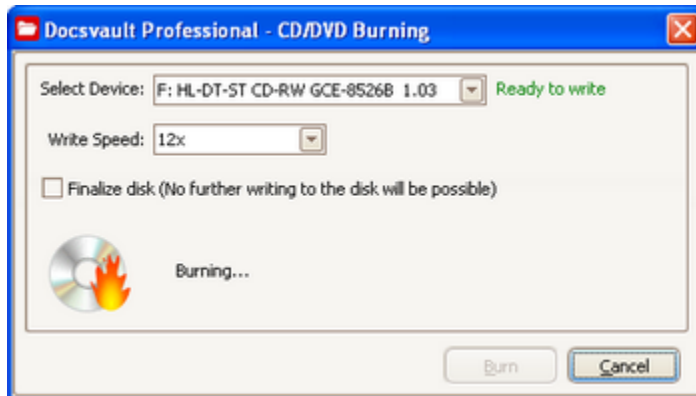
4. When the burning process is complete. Click on [Close] to close the dialog box.
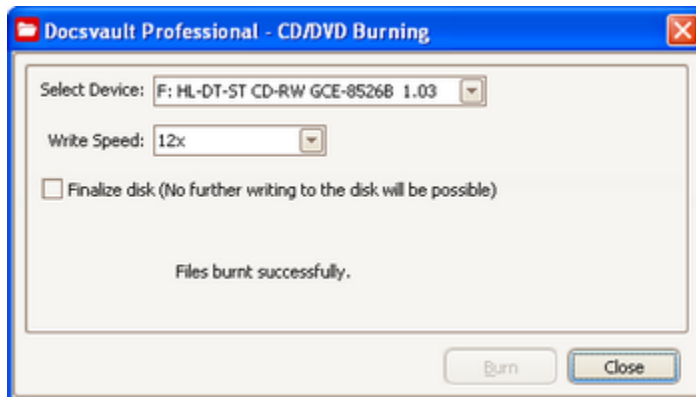
Searching Documents
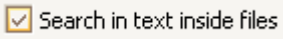
You can search documents that are stored in the Docsvault using the *Search* interface, shown below.
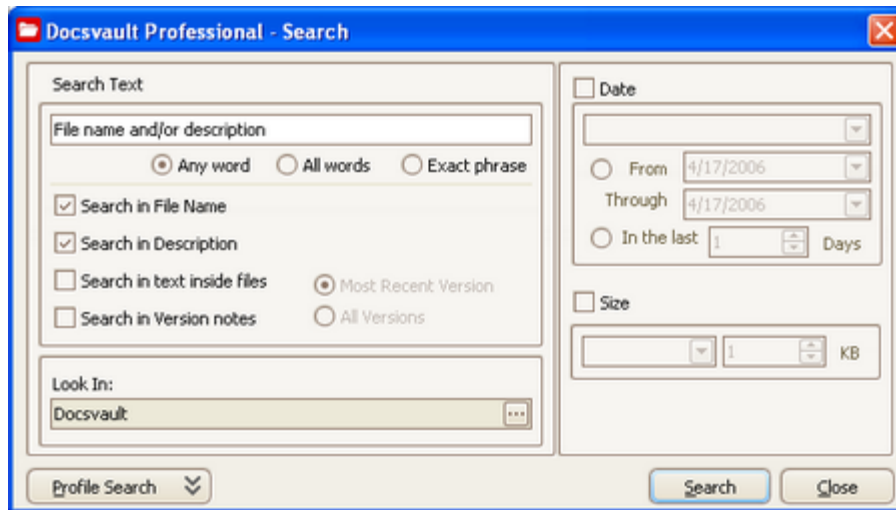

Searching documents by Name or Description

1. Select a cabinet or folder in which you want to search from the tree view or list view panel of Docsvault explorer.

2. Click on the icon from toolbar. This will bring up the 'Search' dialog box.

3. Enter the name and the description of the document.

4. Click on Search .

5. The search results will be shown in a new tab in Docsvault's main window.

Searching a document by word or phrase inside a file

1. Select a cabinet or folder in which you want to search from the tree view or list view panel of Docsvault explorer.

2. Enter a word or a phrase from the content of the file.

3. Click on Search in text inside files check box. Deselect other check boxes.

4. Click on Search .

5. The search results will be shown in a new tab in Docsvault's main window.

Delete & Recover Documents

When you delete a document, folder or cabinet it is relocated to Docsvault's *Recycle Bin*. You can recover them anytime as long as they exist in *Recycle Bin*.
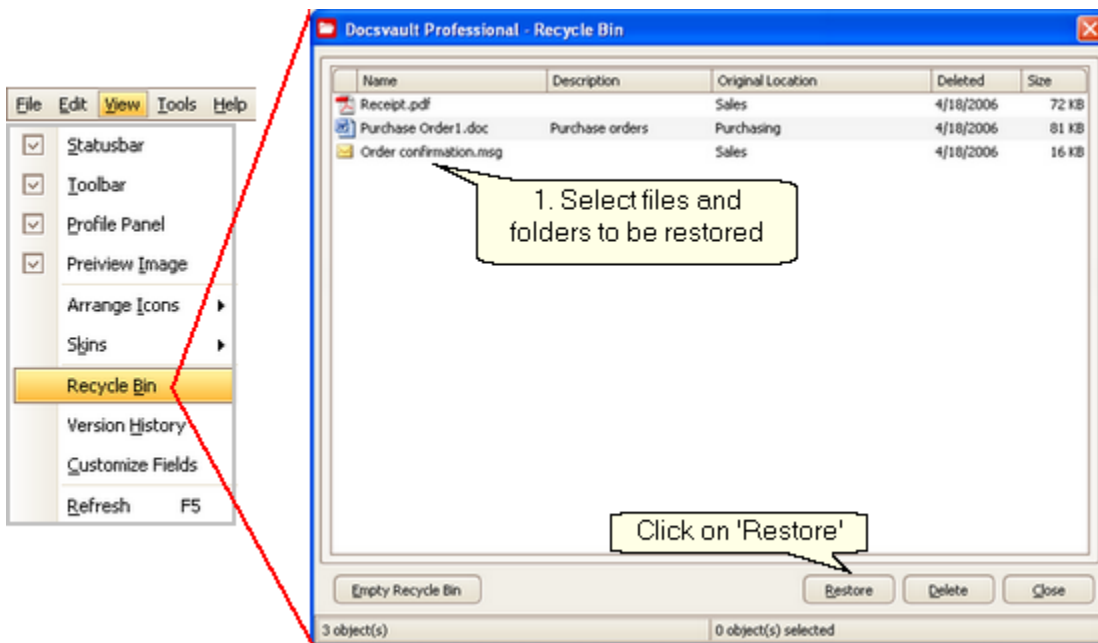
Deleting Documents

1. **Select the documents to be deleted.**

2. **From the main menu select** *Edit >> Delete* **or click on** ![X] **icon. This will popup a message box as shown below:**
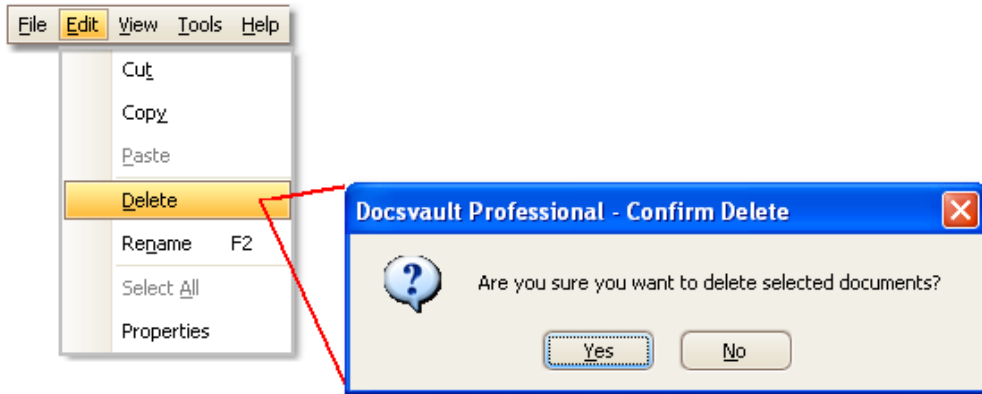
3. **Click on** [Yes] **. This will delete the selected files.**

Restoring Deleted Documents

1. **From the main menu select** *View >> Recycle Bin* **or click on** ![icon] **icon.**

2. **This will display 'Recycle Bin' dialog box as shown below.**

3. **Select files and folders to be restored and click on** [Restore] **.**

Setting Task

1. Click on ⬜ **icon from the toolbar to open the task interface in a new tab**
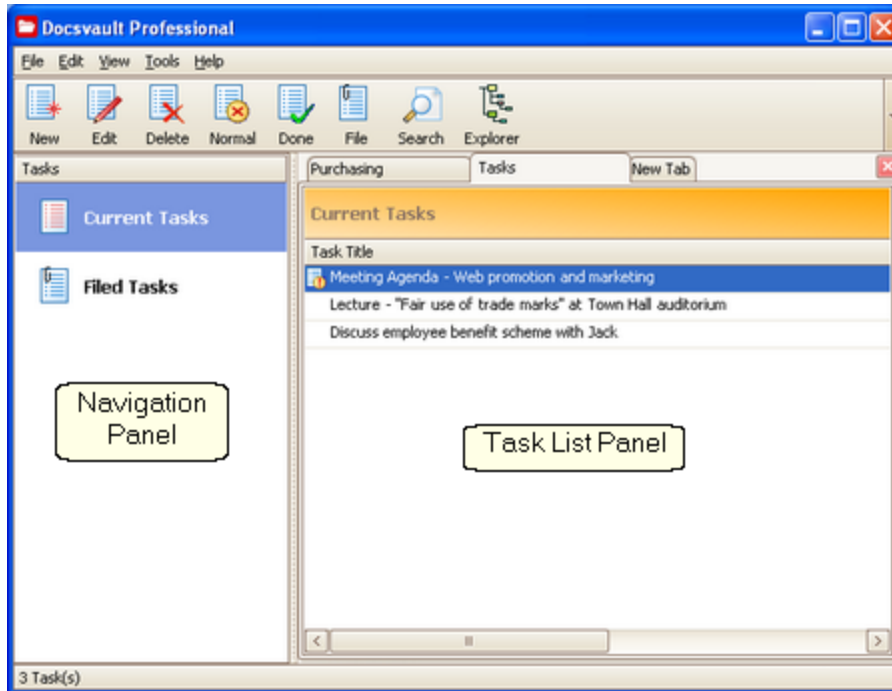
2. Click on the new task icon ⬜ **to display the 'New Task' dialog box**
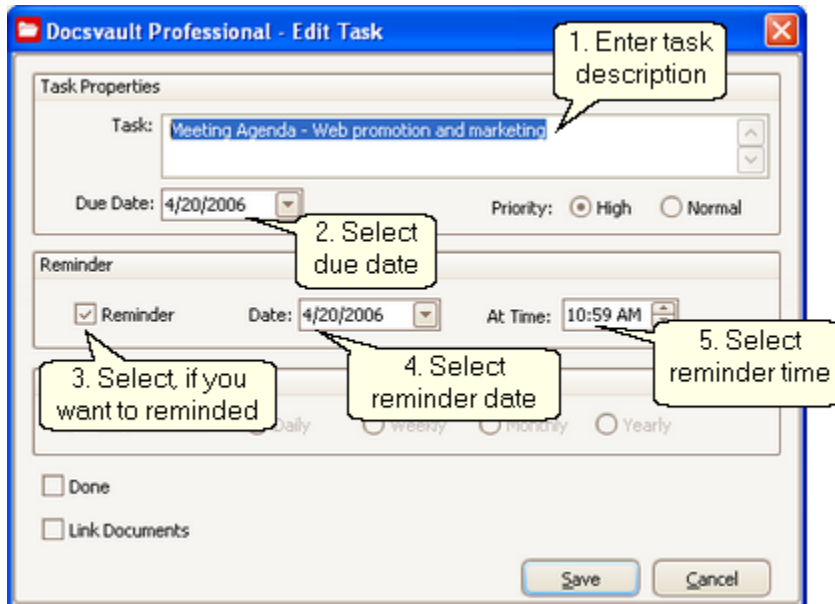
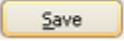**3. Click on** [Save] **to save the task.**

Using PDF Creator

With Docsvault, you can create PDF files from any application that has printing capabilities.
As an example, we will demonstrate the conversion of an MS Word document into a PDF. Make sure that the Docsvault application is running.

1. Open an MS Word document and click on *File >> Print* **to display the standard** *'Print'* **dialog box.**
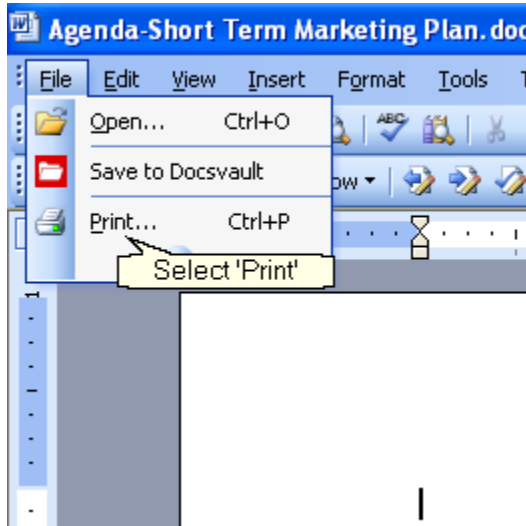
2. Select *Docsvault PDF* **from the '***Printer'* **drop down list and click the** OK .
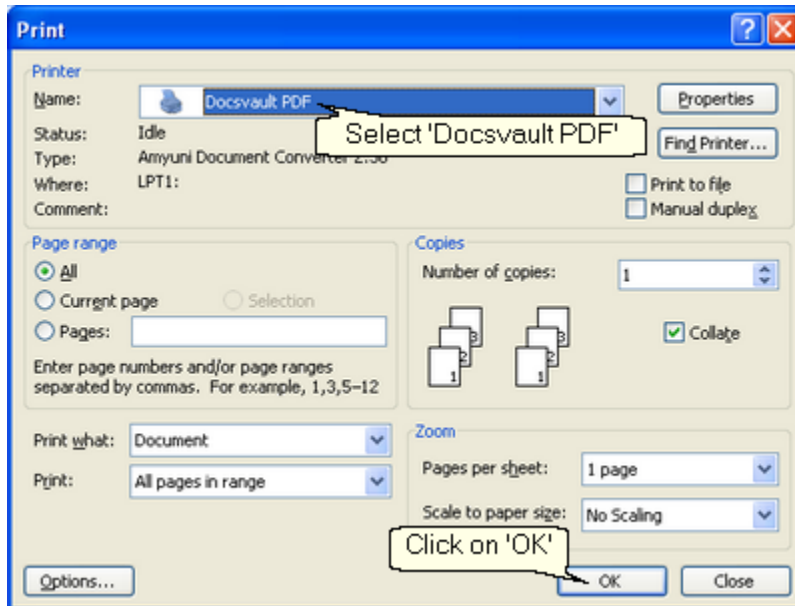
3. **Docsvault navigation dialog box comes up. Select a cabinet into which you want to save the PDF file and click on** Save .
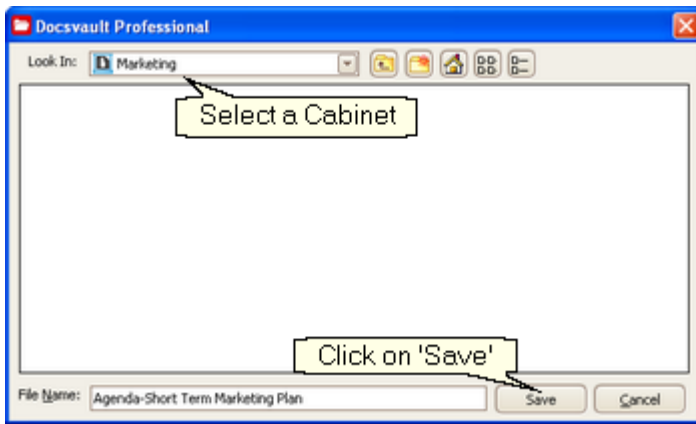
4. This will display the *'Profile'* dialog box. Add a description and click on [Import]
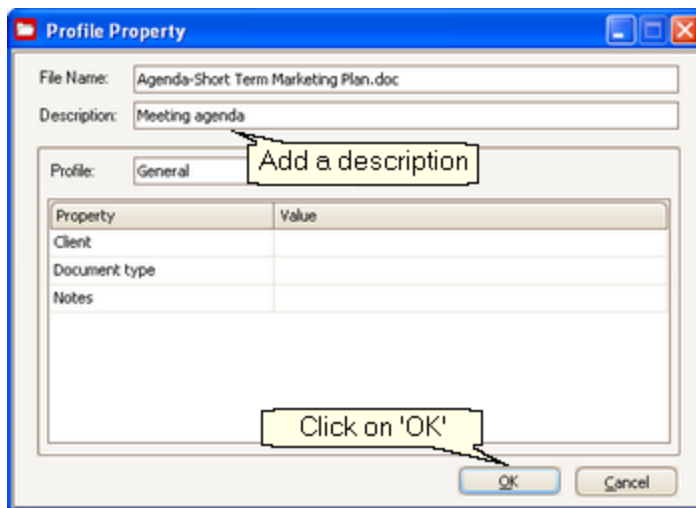
The document is printed into a PDF file which then gets stored in the selected location
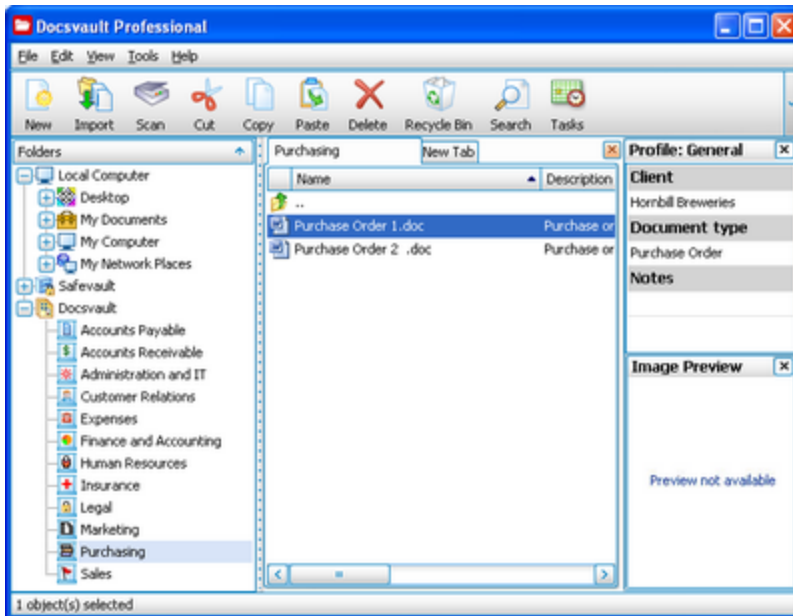
Changing Skin

If you want the Docsvault user interface to have a different look, you can do so by changing its skin. There are six different skins to choose from. The default skin is *Caramel.*
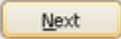
1. From the menu, click on *View >> Skins*
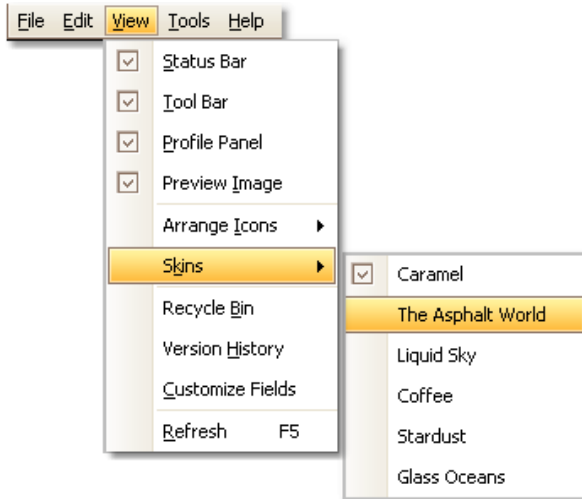
You get six different skins to choose from. Default selected skin is *Caramel*

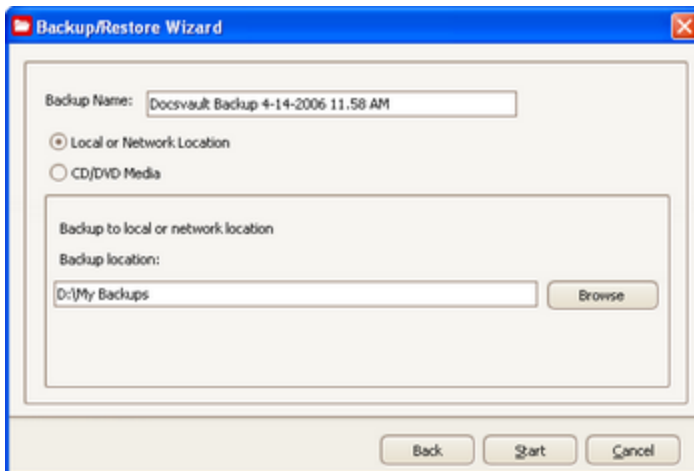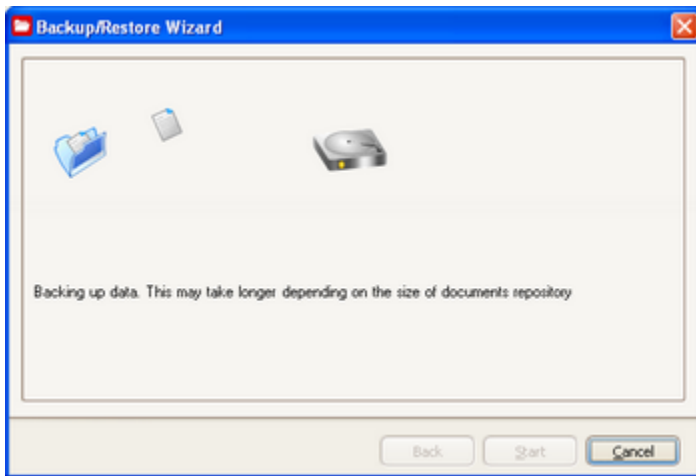**2. Click on the skin of your choice to change the skin**

Backup Documents

1. From the menu click on *File >> Backup/Restore* to display the **'Backup/Restore'** wizard. By default, the **'Backup Document Repository'** radio button is selected. Click on [Next] to display the next page.
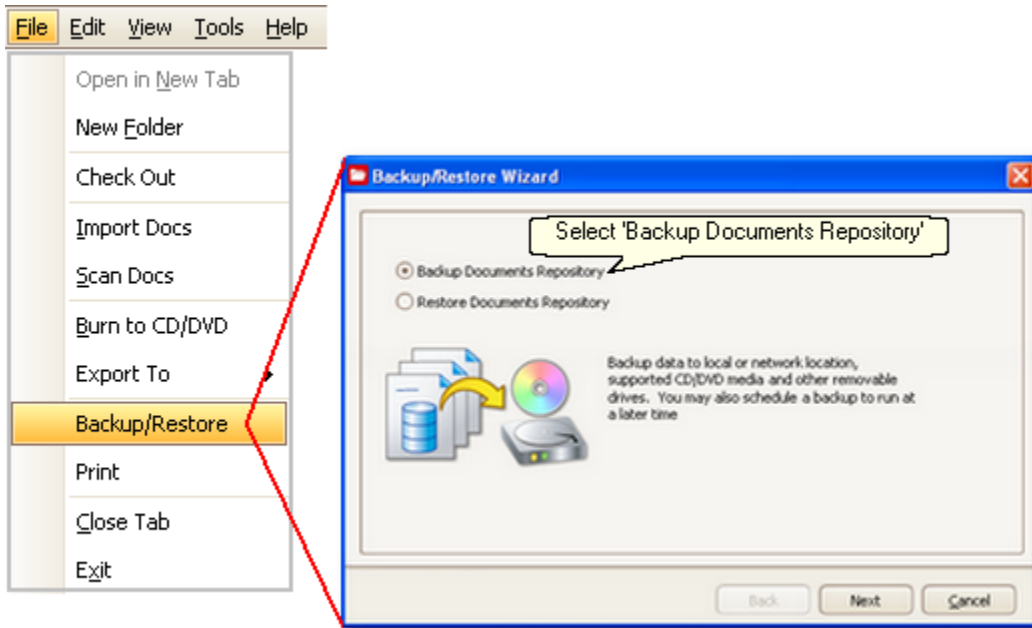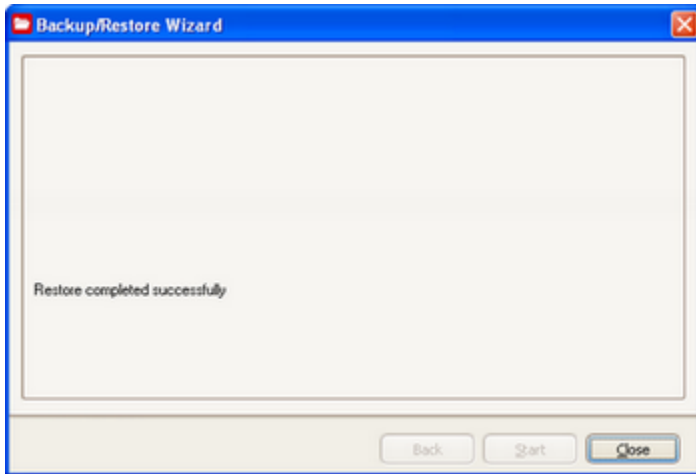
2. Select a location by clicking on the [Browse] button, and then click [Start] to start the backup process.
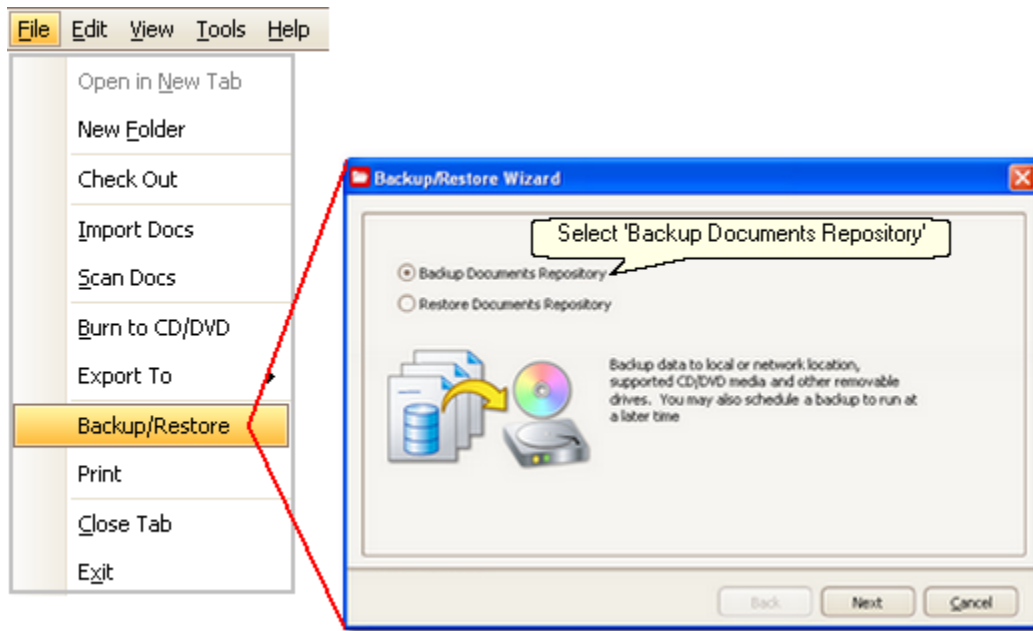
3. Figure below shows the backup process in progress.

4. On completion, the *'Backup Wizard'* gives a success message. Click on [Close] to close the dialog box.
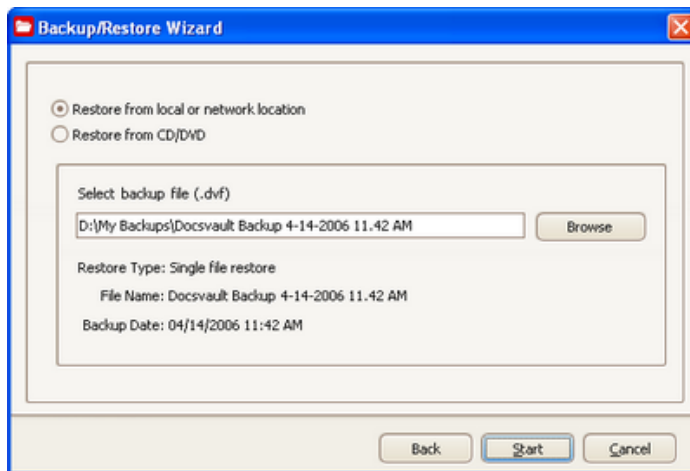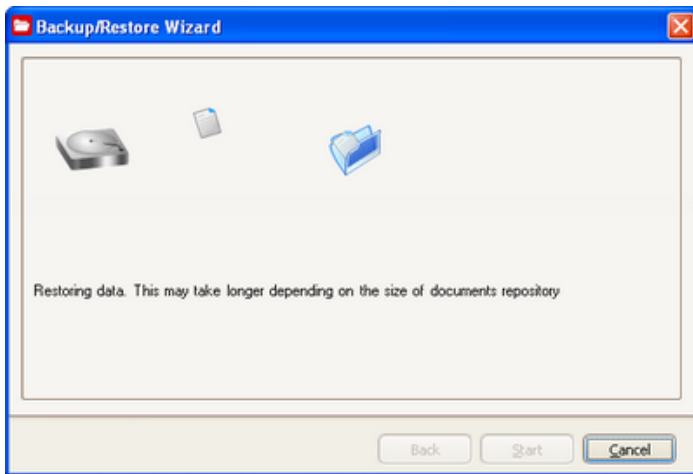
Restore Documents

1. From the menu click on *File >> Backup/Restore* to display the *'Backup/Restore'* Wizard. Select the '*Restore Documents Repository'* radio button and click the [Next] button to display the next page.


2. Two radio buttons are provided to create backup on local/network location and CD/DVD. We have selected *"Restore from local or network location"* radio button. Find the location where you had stored the backup file by clicking on [Browse], then click on [Start] to start the restore process.

3. The restore process starts

Restoring data. This may take longer depending on the size of documents repository

4. On completion, the *'Restore Wizard'* **will give a success message. Click on** [_Close_] **to close the dialog box.**

Restore completed successfully
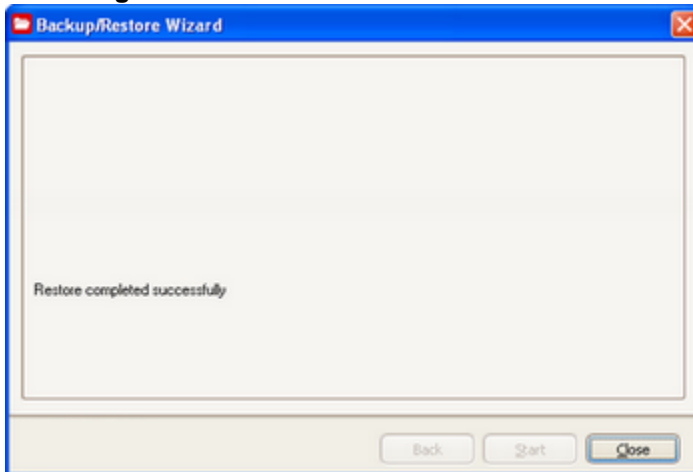
5. After the restoration process is over, Docsvault application shuts down so that the changes can be made in the application. You need to restart the application once again.

Technical Support

For any product related questions that may arise, please use our online Technical Support Forum. Please use the same email address that you provided during product registration.

Customer Service

For general customer service questions, contact us by email at: CustService@edaUSA.com

Easy Data Access

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