DOCTOPIA
OFFICE CONTROL

Getting Started

WELCOME

Welcome to DocTopia. We hope that you find it as useful as we intend and that you will join our ever-growing band of enthusiastic customers in the SME community.

So, what is DocTopia?

DocTopia is a software system to help you organise your day-to-day work and organisation in a modern busy SME office. It is accessed from your PC or Laptop and can also be accessed securely via the internet using a smartphone or tablet (optional extra). It is designed for smaller offices (up to 10 people ideally) in that we have kept it very simple and without the complexities a larger more complex office might require. This keeps it very straightforward to use. Nevertheless, there are very satisfied organisations with more than 10 users using DocTopia.

So, what will it do for me?

Make your office life easier and more organised. That's not an idle claim.

Most modern offices have to jump through hoops to organise their information in a reliable accessible way. How do you make sure that all the information for, a customer for example, is together, up-to-date and in one place, when you have paper files, electronic documents, spreadsheets , notes, phone-messages, and emails all in various different places? You have to remember to print everything electronic (yes, including those emails) and file it all away. Aside from the damage to the planet's forests, that all takes time – lots of it. It also means that you end up with fat paper files where it's difficult to find anything.

DocTopia, properly used, takes this fundamental issue on and allows the whole operation to be much faster, more reliable and just easier.

How?

By bringing all this electronic information together in a very simple way and allowing your paper to be included with it, thus creating a single place where everything is gathered. Being on computer, the information can be rapidly searched and what you might be looking for is found in seconds. Everything for your customer is there, visible in one place, organised by date. Imagine being able to search all your filing cabinets like you search the internet. With DocTopia you can.

As well as all these pieces of information, DocTopia also allows you to manage your pending Tasks for each file (a customer for example). This feeds into individual ToDo lists for each user. So you can also see the details of any Tasks pending for a customer, as well as the documents and information. Add to all that the ability to maintain any number of Contact Databases, and associate them with files, and you have a very powerful but simple tool to really boost your office performance.

The tag-line for DocTopia is *"Keeping it ALL together".* It delivers. Read on.

BEFORE YOU READ ON…..

The first section on this document (up to page 14) is for initial setting up of the system and needs to be referred to only occasionally thereafter – for setting up new users for example.

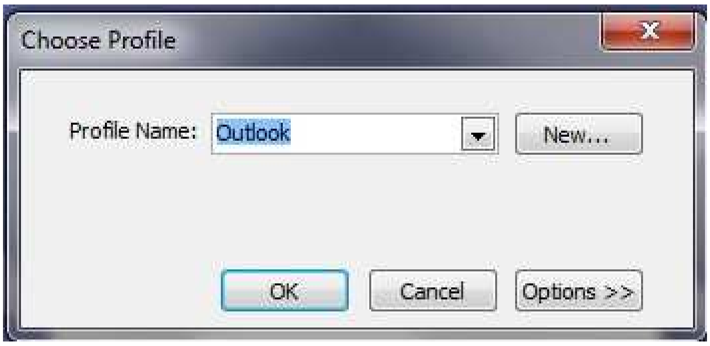
As this is a "Getting Started" manual, it does not contain details of every single aspect or feature in DocTopia. Nevertheless, if you cover the material in this document, you will be able to use DocTopia very beneficially and will be missing only the more "esoteric" options.

Sometimes it takes several pages to describe a simple process – this is because of the screenshots. Don't be put off.

STARTING DOCTOPIA

You should find an Icon on your PC desktop like this: 

This starts DocTopia. You will then be presented with the Outlook Profile chooser. DocTopia "talks" o Outlook so it must know which Outlook profile to use. Most people only have one profile so you'll probably just click OK for this.

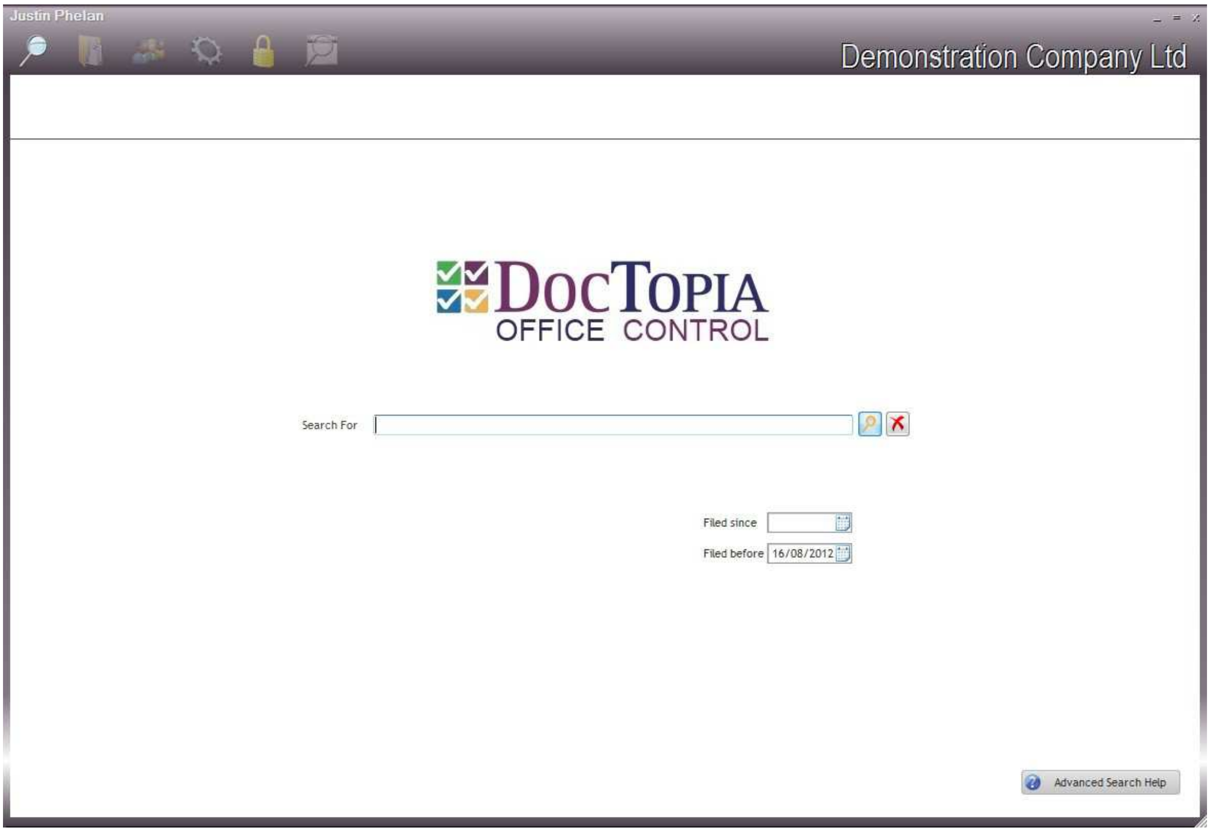


When you've chosen your Outlook profile, you will be asked to Log In:

The first time you start DocTopia, you can sign in as "admin" with a password of "admin". If a DocTopia engineer installed the system, they will probably have asked you for your Windows login name. If so, you'll see a button "Use Windows Login". Simply click this to sign in without having to enter any details.

FINDING YOUR WAY AROUND

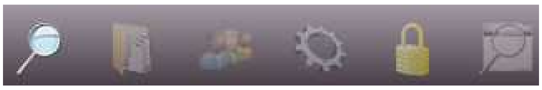
As soon as you've signed in for the first time, you'll see the main DocTopia search window:

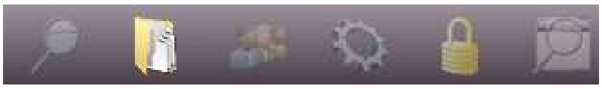


The darker parts of this window stay constant. You'll see your name in the top left corner above a toolbar of 6 buttons. Your company name is to the right.

The toolbar allows you to navigate between different DocTopia areas: Search, Files, Contacts, Tasks. The last 2 buttons are to lock the screen and view your last search results.

The currently selected area is shown bright and the others are greyed:


"Search" selected

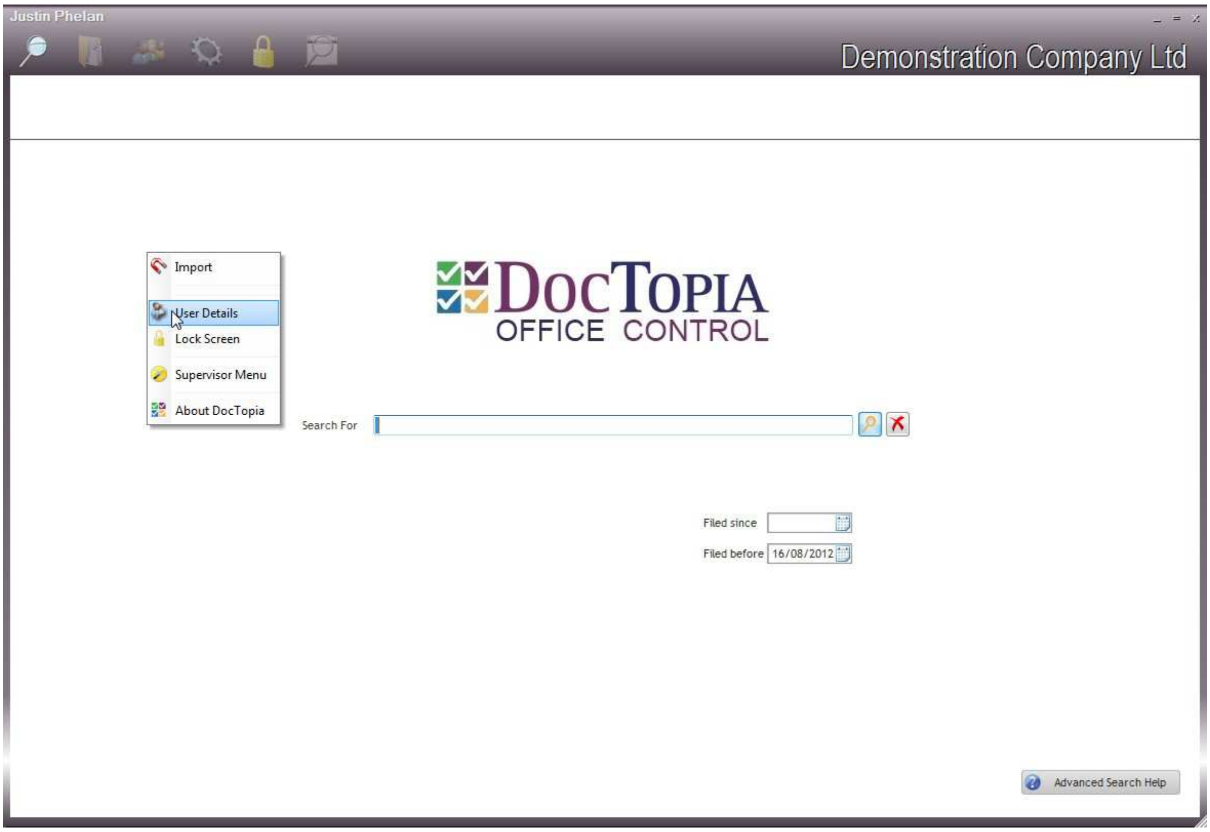

"Files" selected

The rest of the Search area should look familiar to you. It operates like most of the internet search engines. Simply type a word or phrase, press the search button (or Enter key) and a list of documents in DocTopia containing that word or phrase appears in seconds. You can browse through these results by clicking on each one in the list to see the document. This is DocTopia at its simplest.

THE RIGHT CLICK

Access to almost all of the functionality in DocTopia is by ***Right-Click***ing on your mouse. This will bring up a menu of options which applies to the area your mouse is pointing to. Remember this.

If you right-click on the Search area (or anytime on the dark background area), you get the basic System menu:



If you have been set up as a Supervisor, one of the options will be *Supervisor Menu*. You will need to click on this to go to the areas you need to set up the system for use.

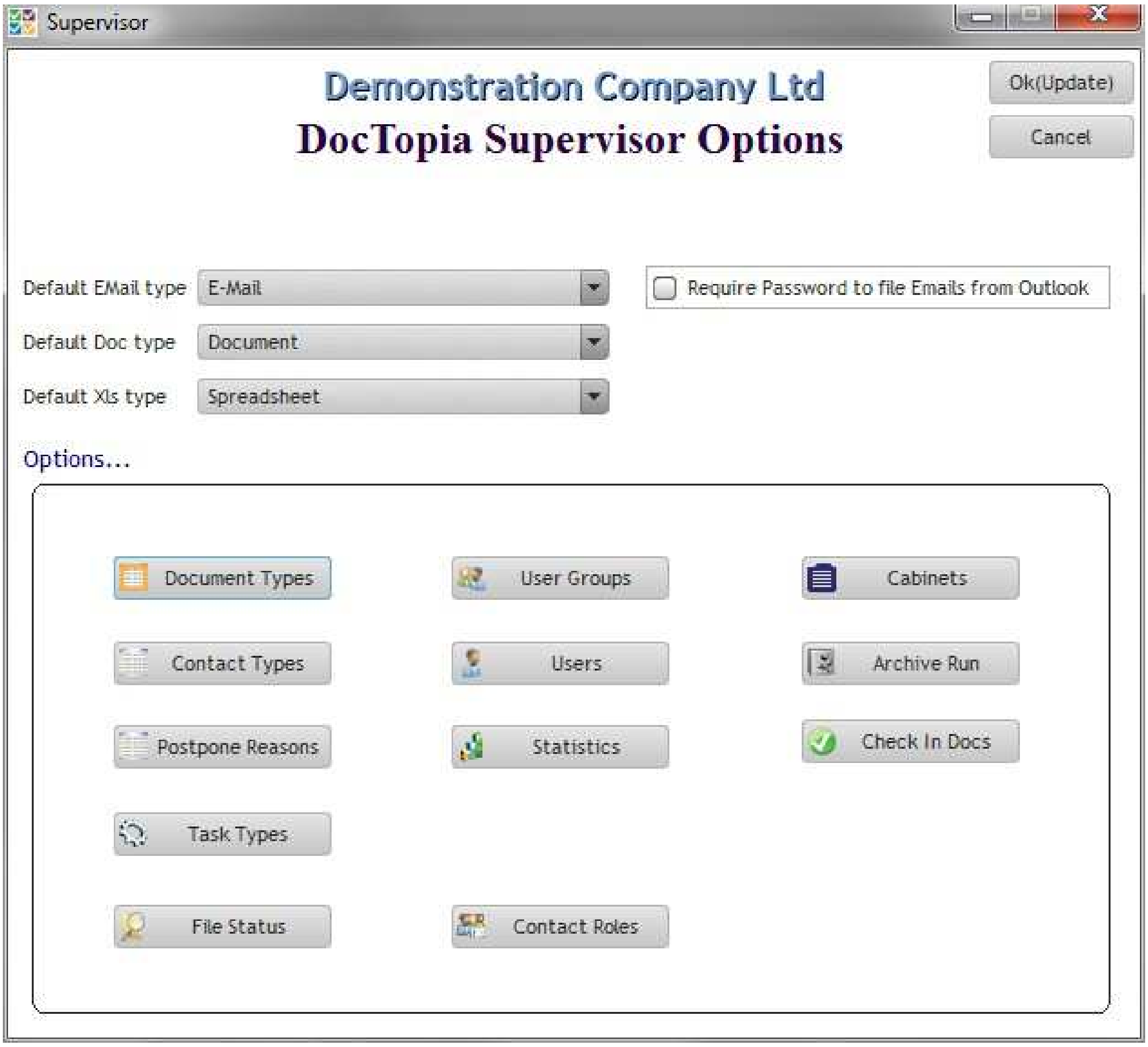
Before clicking, notice 2 other options; *Import* and *User Details*.

The *Import* option is used to import documents into DocTopia from your computer or network. These could be MS-Word documents, MS-Excel spreadsheets, or scanned documents as PDFs. (Make sure when scanning your documents to scan to “PDF with Text” as this allows them to be searchable in DocTopia). We’ll go into more detail later.

The *User Details* option allows you to re-set your password, which you should do from time to time. Again, more details later.

Ok, on to the Supervisor Menu.

SUPERVISOR MENU



DocTopia comes pre-set with a few basic Document Types and these are set to the defaults for documents added from MS-Word, MS-Excel and MS-Outlook. This means that DocTopia will automatically set the Document Category(Type) to these values without you having to select one each time. You can of course select different Types if you want.

Document Types, Contact Types, File Status and Contact Roles are simple lists looked up when you are entering items into DocTopia. Postpone Reasons and Task Types are a little more complex (only a little!).

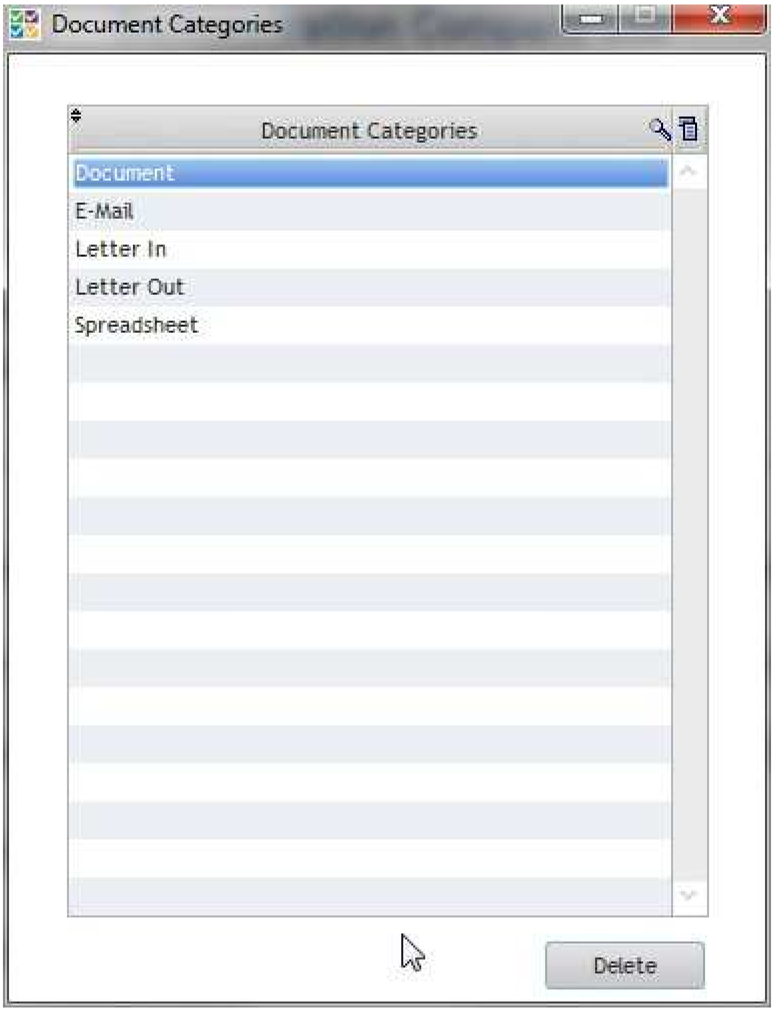
DocTopia has a very capable security system based on user roles. More on Users and User Groups later.

The Cabinets button allows you to Add and change Filing Cabinets. In DocTopia, you create Filing Cabinets and fill them with Files into which you put Documents and To-Dos. Just like you do with your paper at present.

Read on to see how to manage the simple list items…

SIMPLE LOOKUP LISTS

We can use the Document Type List as a sample for all of the simple list items (Document Types, Contact Types, File Status and Contact Roles).



To edit a particular entry, simply double-click on it and type your modification.

To add a new item to a simple list, simply double-click in the next row and type your entry.

To delete an item, select it and press the Delete button. You will not be allowed to delete a list item if it is in use anywhere.

On the next page there is an explanation of each of these simple List types.

SIMPLE LOOKUP LIST TYPES

Document Categories (Types):
When a document is saved to DocTopia, it can be given a Type or Category. This obviously provides some information about the document when you are looking at in a list. It also allows you to view documents of a certain type. For example, you could view just the “Policy” type documents for a customer, filtering out all the other documents so that you can see only what you want.

Contact Types:
Again, these are used to categorise Contacts. In the examples here, they are categorised as “Agents”, “Clients” etc. But you may wish to use this for Industry Category or Source. You can use it as you wish.

File Status:
When you set up a File (in a filing Cabinet) in DocTopia, you are given the option to “Track Status”. This means that, as you perform tasks/file documents for this file, you can set/change the File Status. There is a report which shows files at each Status. An example of this might be an Initial Status of “Suspect”, moving to “Prospect”, moving to “Order”, moving to “Delivered” etc.

When setting up Task Types, you have the option to select a Default File Status. When you complete a task of this type, it will, by default, set the File Status to this value. This allows you to semi-automate some of your work processes and keep track of them. For example, it would be reasonable to set a File’s Status to “Sold” in an Estate Agency if the Task being completed is “Sale Completed”.

Contact Roles:
DocTopia allows you to associate a Contact from one of its Contact Databases as the “owner” of a File (for example, a Client). It also allows several other Contacts to be connected to a File in an “other” capacity (for example, the Client’s Advisor or Accountant). In this way, when you are looking at a particular File, you can see everyone associated with it.

When a Contact is associated with a File in an “other” capacity, they have roles. This simple list should contain all the roles you might need. Examples would be; Accountant, Advisor, Solicitor, Spouse etc.

For all of these List items, you should fill in as many as you think will be useful for you while keeping the list reasonably short. It would start getting a little unwieldy if there were more than 20 or 25 items in any list.

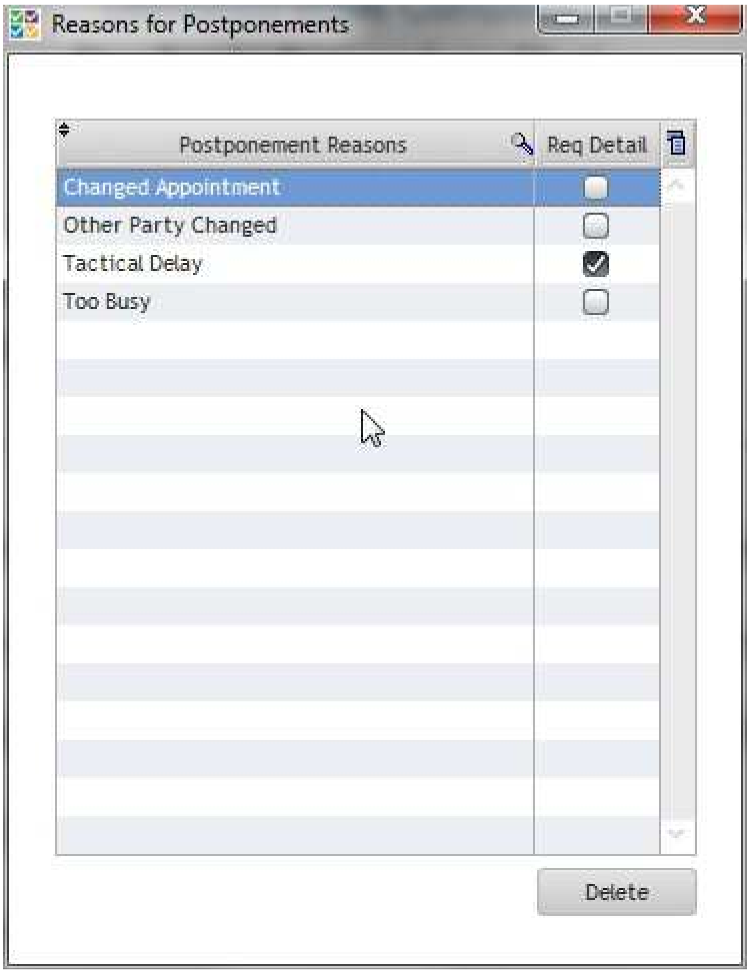
Read on for Postponement Reasons….

POSTPONEMENT REASONS

This is also a simple list, but with a twist. There is an extra piece of information as an option.

When a task is postponed (DocTopia keeps track of postponements), you must select a reason from this list.

Sometimes, it is appropriate to look for some more information for a postponement, so you can indicate (by clicking on the *Req Detail* check box) that for this postponement reason, more information will be required.



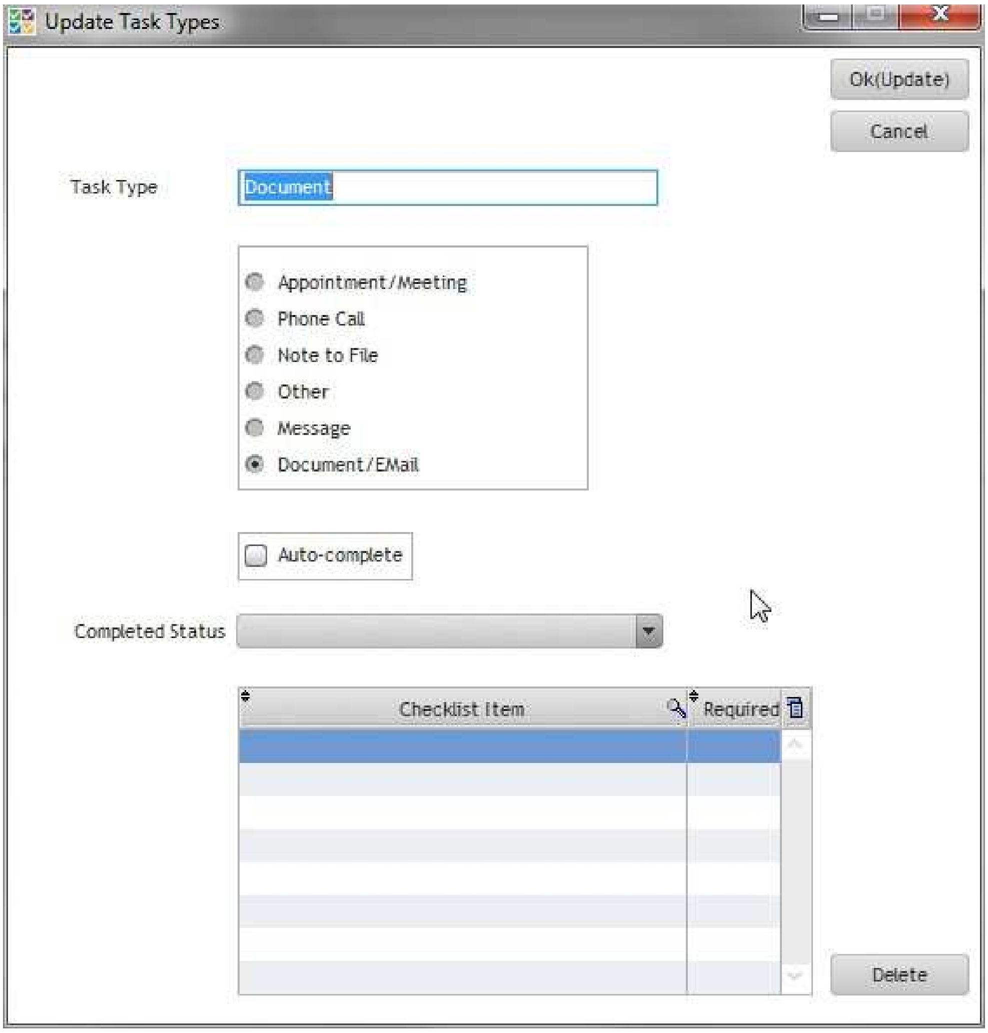
For any task in DocTopia, you may view its Postponement History. Also, when a Task appears in *italics* in the Pending Tasks for a File, it has been postponed.

Another useful feature is the ability to view all postponements for a File. Imagine if an irate customer called to complain about the pace of progress and you were able immediately able to see why there were delays and who was responsible for them. Could be useful sometimes!

Next, we'll have a look at a more complex List item – Task Types.

TASK TYPES

When you select the *Task Types* button on the *Supervisor Menu*, a list of Task Types appears, just like with the Simple Lookup Lists already done. However, you may not edit this list directly. You must select the function you want from the *New, Change* or *Delete* buttons on the right hand side of the list. The *Delete* button, operates in exactly the same way as on the Simple Lists. Both the *Add* and *Change* buttons open a form like this:



Simply type the *Task Type* and select a category from the list displayed. Set *Auto-complete* ON if you want the task to be completed as soon as you enter it (a very rare occurrence).

Select a File Status from the list for *Completed Status* if you wish this Task Type to affect a File's status when it's completed (if the File's Status is being tracked).

For some Task Types you may wish to set up a *Checklist*. This is displayed when a Task of this type is being completed and Required Checklist items MUST be ticked as completed. A record is kept of each completed checklist for audit purposes. Non required checklist items are reminders at completion. Use the *Delete* button to remove Checklist items from the list.

Ok. We're nearly finished the system set-up now. Just the User stuff to go….

USER MANAGEMENT AND SECURITY

If you are going to be the only user of the system – you can skim over this. If you're not interested in different security profiles for different users, just focus on the **Users** section and ignore the **User Groups** section.

Supervisor Security

At least 1 user of the system MUST be a Supervisor. This is simply a checkbox in the Users Setup. Supervisors have access to all the functions of the system and may manage users, lookup lists and security. In addition, in order to prevent random proliferation of Filing Cabinets, only supervisors may set them up.

Role Based Security

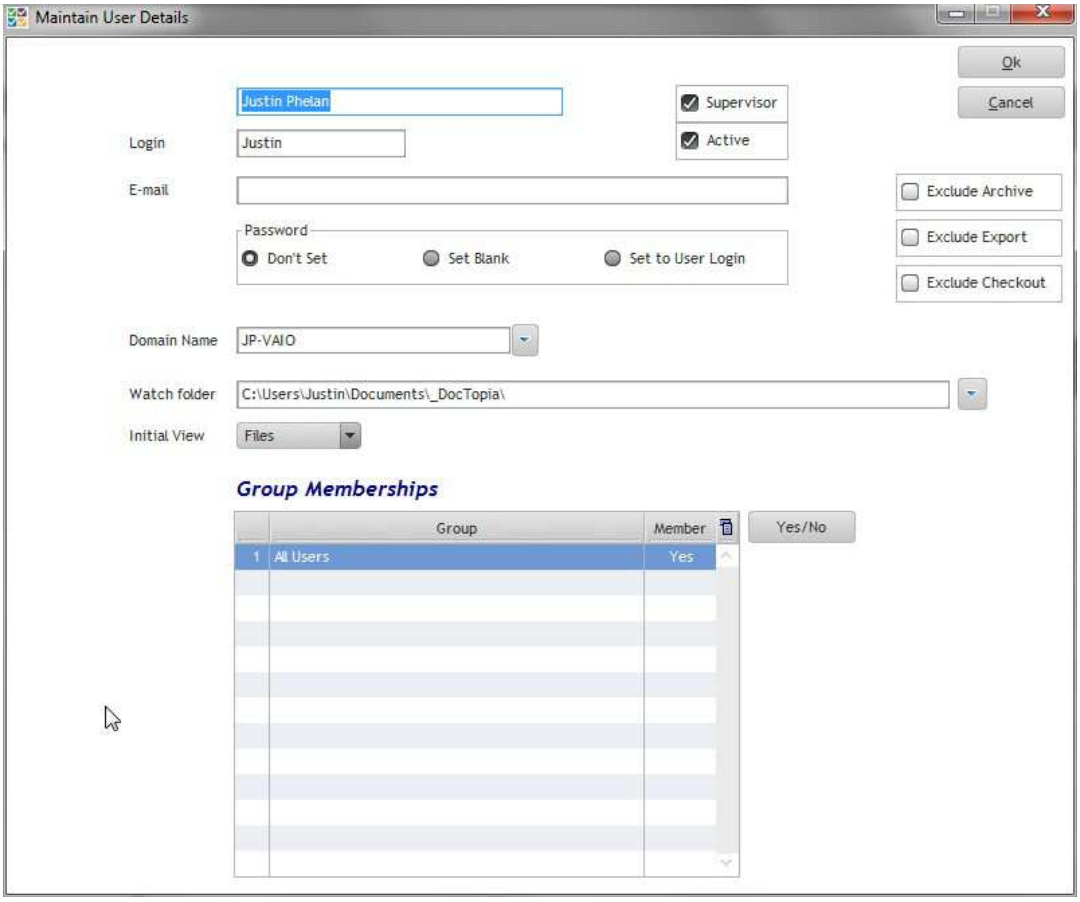
DocTopia allows User Groups to be set up and then access to particular Files or Filing Cabinets can be restricted to specific User Groups. This means that information/documents considered confidential may be safely saved to DocTopia because only those who you wish to see it will do so.

User Groups:

Simply change a group name and make it active for it to come into effect. You may then make any user a member of that group in the Usres section (next….)

USER MANAGEMENT

When you press the *Users* button on the *Supervisor Menu* a list of Users is displayed. Select the *Add* or *Change* button as you require. A window similar to the one below is shown:



Type in the *Users Full Name*, followed by their *Login* Name (this should, where possible and when connected to a network domain – be the same as the Windows login). The *E-mail address* should also be entered here.

Usually, the supervisor should not set the password – except when adding a new user, you may set the password to be the same as the User *Login*.

If the PCs are normally connected to a network, select a *Domain name*.

The *Watch Folder* is the PC or Network folder the Import function goes to by default.

The *Initial View* sets what area (Search, Files, Contacts or Tasks) this user goes to when they log in to DocTopia.

A list of all *User Groups* is shown. Use the *Yes/No* button to make this user a member or not as you want.

You can ignore the 3 *Exclude* checkboxes on the right of the window for the moment.

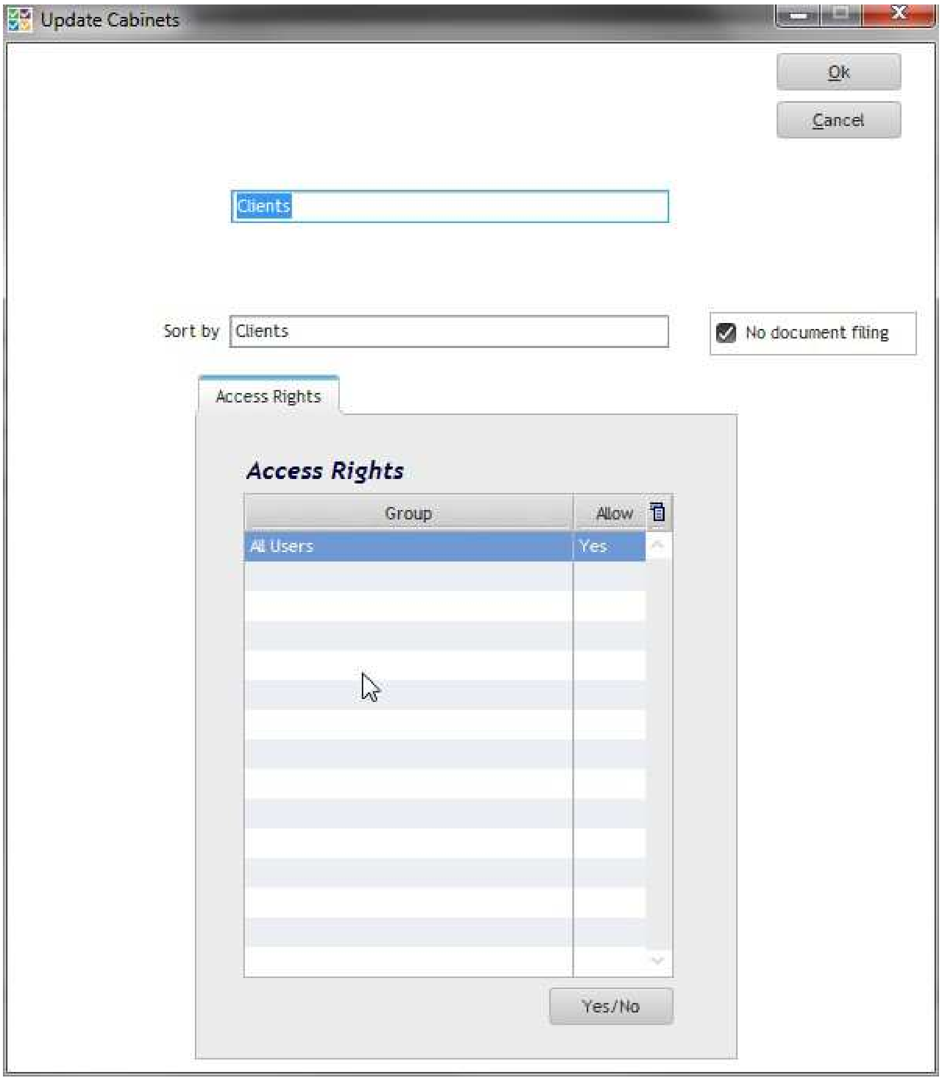
That completes the system setup requirements. Now you can get on with your Filing Cabinets and Files!

FILING CABINETS

At the heart of DocTopia, as with any filing system, are the Filing Cabinets. These can be set up from both the *Supervisor Menu* and in the *Files* area in the Right-click menu of the Files section.

Hint:
Keep the number of Filing Cabinets to a sensible number. Again, going over 30 might be excessive.

Again, from the list of Cabinets, select *Add* or *Change* as you want. This window opens:



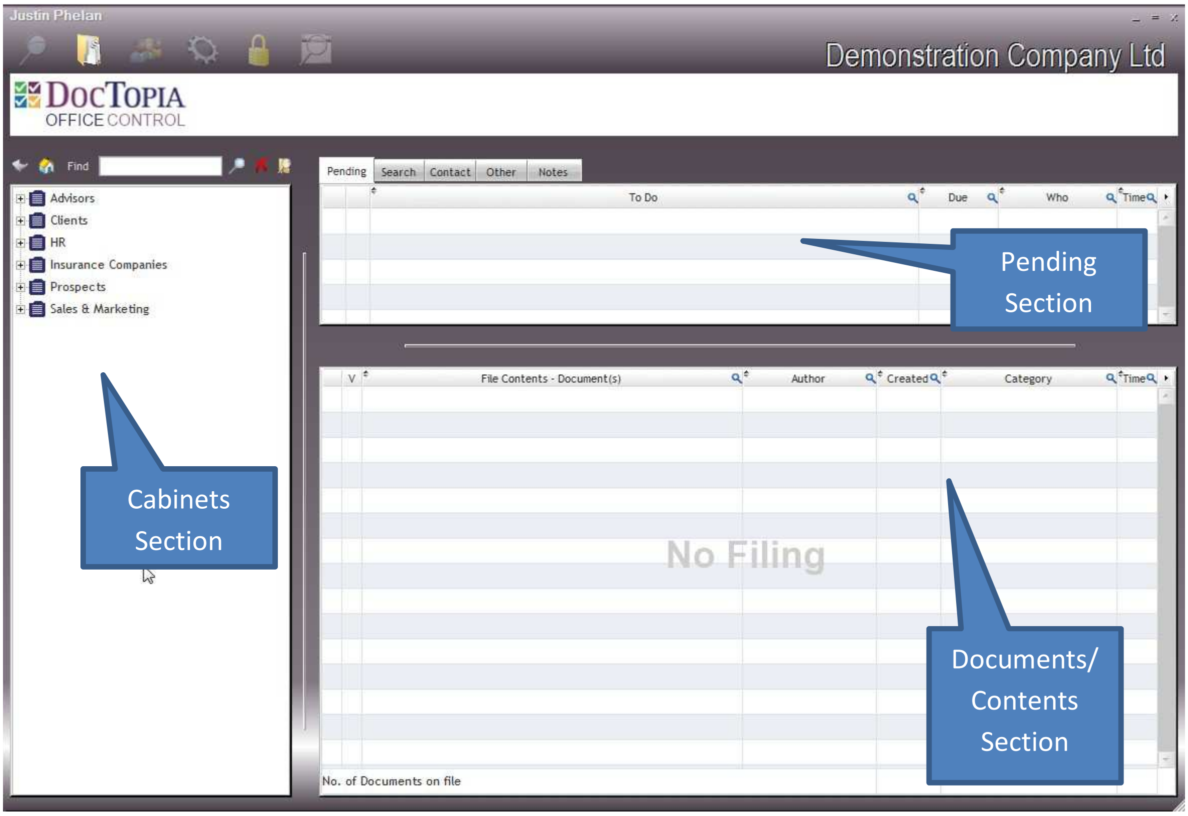
Simply type the Cabinet Name. DocTopia will automatically sort Cabinets in Alphabetic sequence (lower case last). If you wish to sort in a different sequence, enter the sort sequence you want. For example, if you're setting up a file for "John Ford", you might want to sort by "Ford, John"

Usually, you won't want to file documents directly into a Cabinet rather than into Files, so leave the *No Document Filing* ticked.

Use the *Yes/No* button to set which User Groups should be allowed to access this Cabinet. If a group is excluded (No) then members of that group won't even see the Cabinet.

FILES

This is the *Files* area of DocTopia:



Selecting a Cabinet or File in the <u>Cabinets Section</u> (clicking on it) will populate the <u>Pending Section</u> and the Contents Section for that Cabinet / File (Note: usually, Cabinets will have no <u>Contents</u> or <u>Pending</u> Tasks).

To view the Files in a Cabinet in the <u>Cabinets Section</u>, click on the plus sign (+) to its left. If there is no plus, there are no files. (See next page).

The <u>Pending Section</u> contains several Tabs:

Pending: Shows and manages Pending Tasks for this File

Search: Type in a word or phrase to search for in this File only

Contact: Details of the Contact (from a Database) principally associated with this File

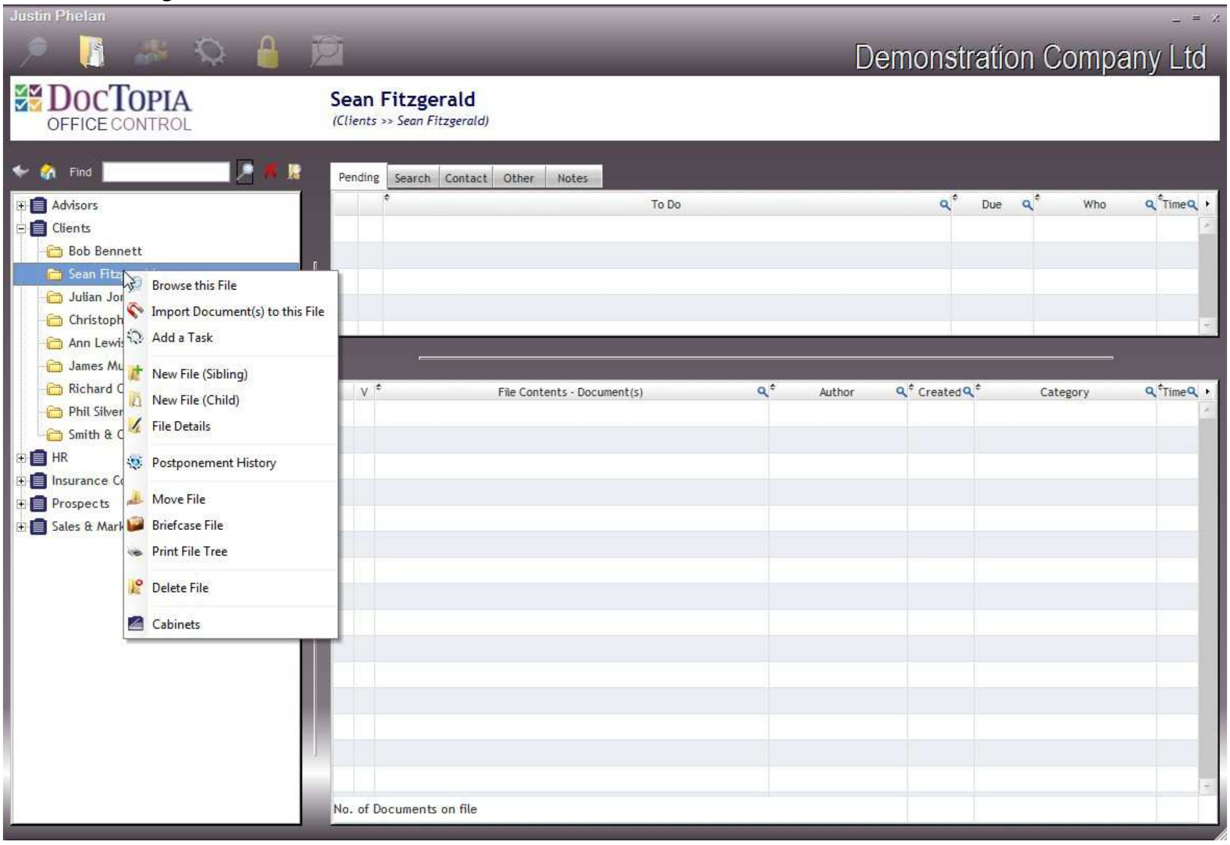
Other: Details of any other Contacts associated with this File & their roles

Note: Allows you to Add/Edit Notes for this File

The DocTopia Window can be resized by dragging on its lower right hand corner. All the sections will adapt. Also, you will notice 2 bars between the sections. If you drag these, you can reshape the proportions of the individual sections.

FILES (continued…)

Here is the *Right-click Menu* for the Cabinets Section:



This is what you use to add Files to Filing Cabinets, but before doing so, why don't you take a minute to read the other options on the Menu above.

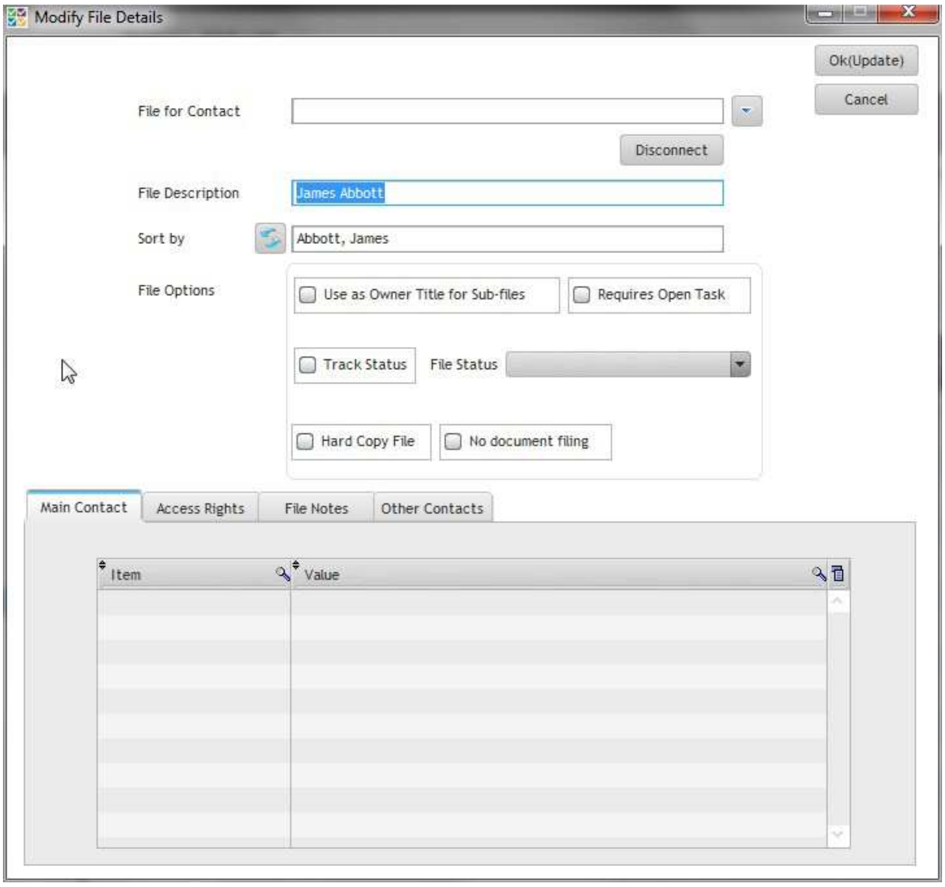
Also, this is a good opportunity to familiarise yourself with the Find File facility. You will notice a *Find* box above the Cabinets Section. To find a file, simply type any part of its name in the box and press the *Search* button to its right (or press the Enter key). A list of all files containing what you typed will be shown. To cancel the search and show all files again, press the *Cancel Search* button (the Red X).

You will notice that there are 2 *New File* options on the menu. DocTopia allows Files to contain sub-files. The *Sibling* option will create a file *beside* the currently selected file. The *Child* option will create a new file *beneath* it - a sub-file. So, to create the Bob Bennett File above when Sean Fitzgerald was selected, *Sibling* was used. To create the Sean Fitzgerald file when the Clients Cabinet was selected, *Child* was used.

As we have already added some files in the above example, we can use the *File Details* option to view the details. This window is also used when you create a *New* file.

Now for a look at the details of Files….

FILE DETAILS



To set up a simple file, type the File's name in the *File Description.* Decide how you want DocTopia to sequence it in the *Sort by* box. Pressing the button to the left of the *Sort by* box will switch the last word in the *File Description* from front to back or back to front as you want. Try it out.

In the example above, the File will be called "James Abbott" but it will come close to the top of the list because it will be sorted in the "Abbott, James" sequence.

Although there are several more options for Files, for the moment, we can leave it as simple as that. We'll come back to more advanced Files later. Press the *Ok* button to update.

Other information:
Use as Owner – *redundant*
Requires Open Task – *DocTopia will insist on the file having an open task. Useful for process files. The file will show a red stripe in the file list.*
Track Status – *This file has a status (from the list). You must set an initial status if this is ticked.*
Hard Copy – *This indicates that there is a hard copy version of this file. The icon will show this. The file will show paper contents in the file list*
No Document Filing – *This file can only have sub-files and no documents. The file will show blue.*

The Main contact tab shows details of the contact connected above. Access rights may be set on the 2nd tab. Notes for the file may be entered/edited on the 3rd tab and "other" contacts may be connected with the file on the last tab.

Now it's time to start importing some documents…..

IMPORTING DOCUMENTS

The *Import* facility is available from the basic System menu (right-click on the dark background) or from the Cabinets menu (right-click on a Cabinet/File in the Cabinets section of the Files area.

To import from a folder on your PC or network, you must first *Choose* the folder. Use the button on the right to select from a list. When you have chosen the folder, its contents will be displayed in the panel on the left (as below). As you select a document (left-click) it will show a preview of that document in the panel on the right – as below.

Once you've selected the document you want to import, press the *Import and File* button.

Before we move on, there are a few things worth noting here:

You can select several (or all) the documents in the folder, so that they can be imported together.

When you have selected a document, you can change its DocTopia Name (top right and press the *Confirm* button alongside).

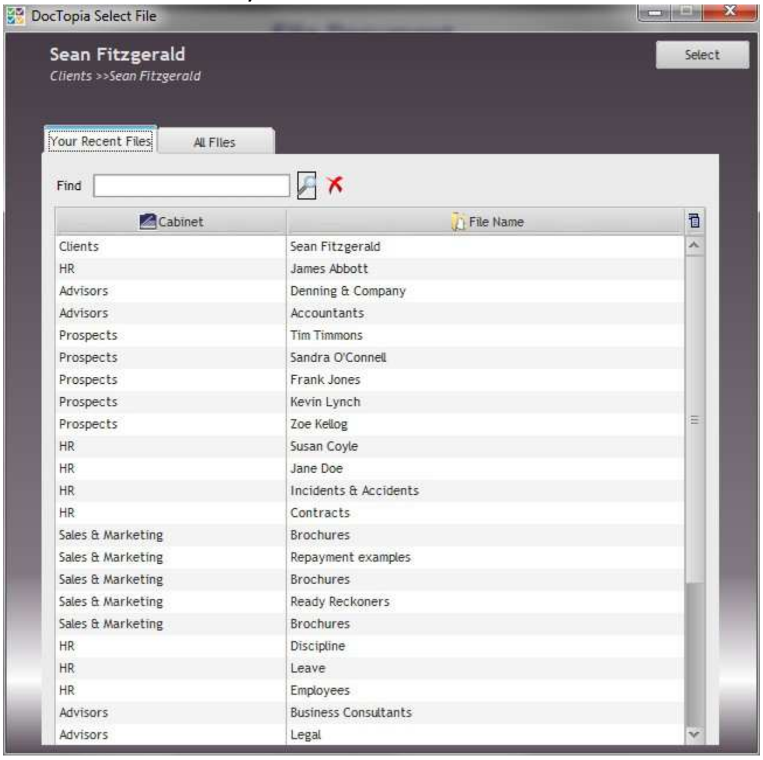
Documents that are password protected, will cause problems as DocTopia will be unable to access them. While it will handle the situation, it's much more efficient to remove any passwords before trying to import them to DocTopia.

Ok, so you've pressed the *Import and File* button….

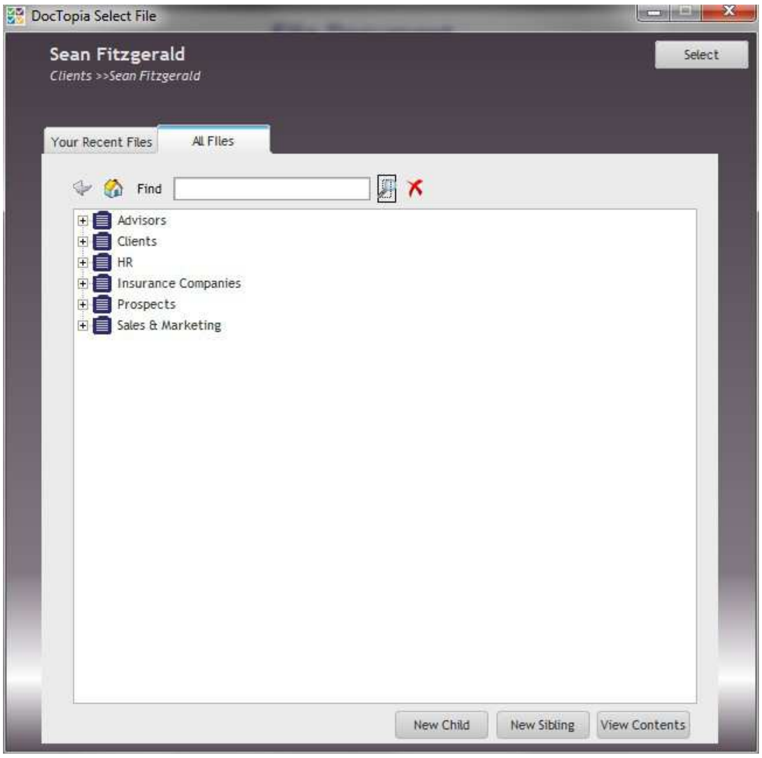
IMPORTING DOCUMENTS (Continued….)

You now have to select which File to import your document(s) to….

You can select from your Recent Files…



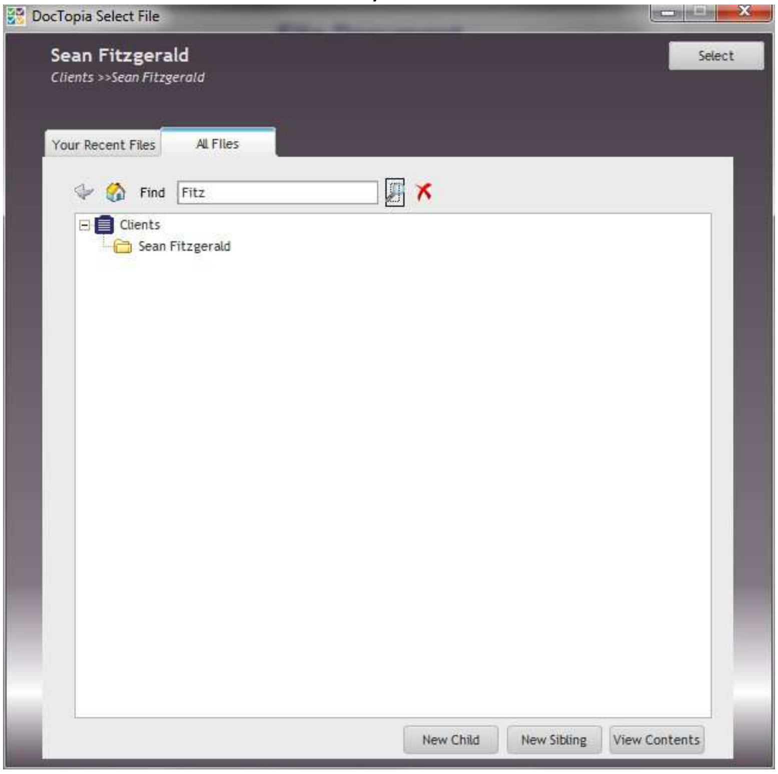
or from All Files



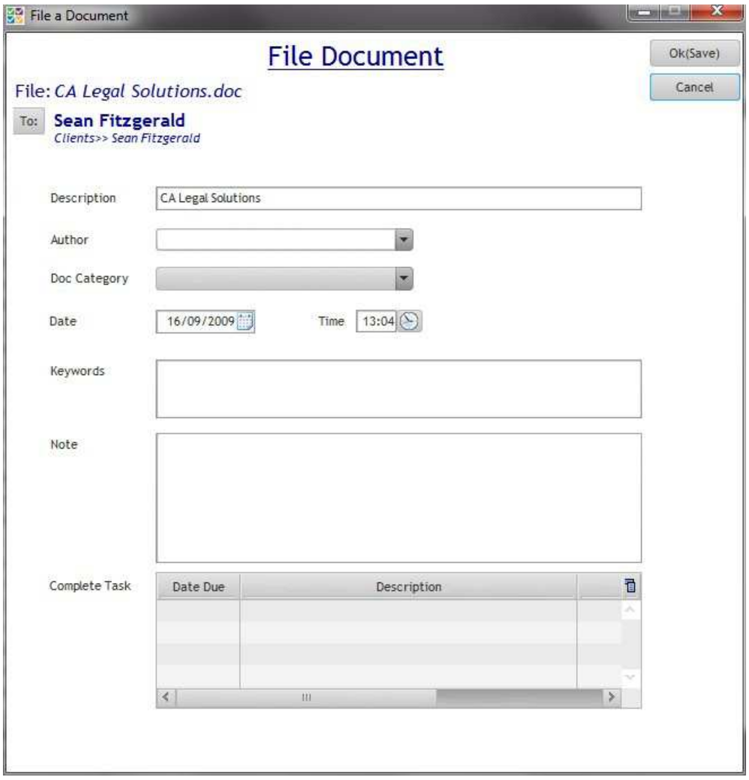
And….

IMPORTING DOCUMENTS (Continued….)

You can use the File Find facility…



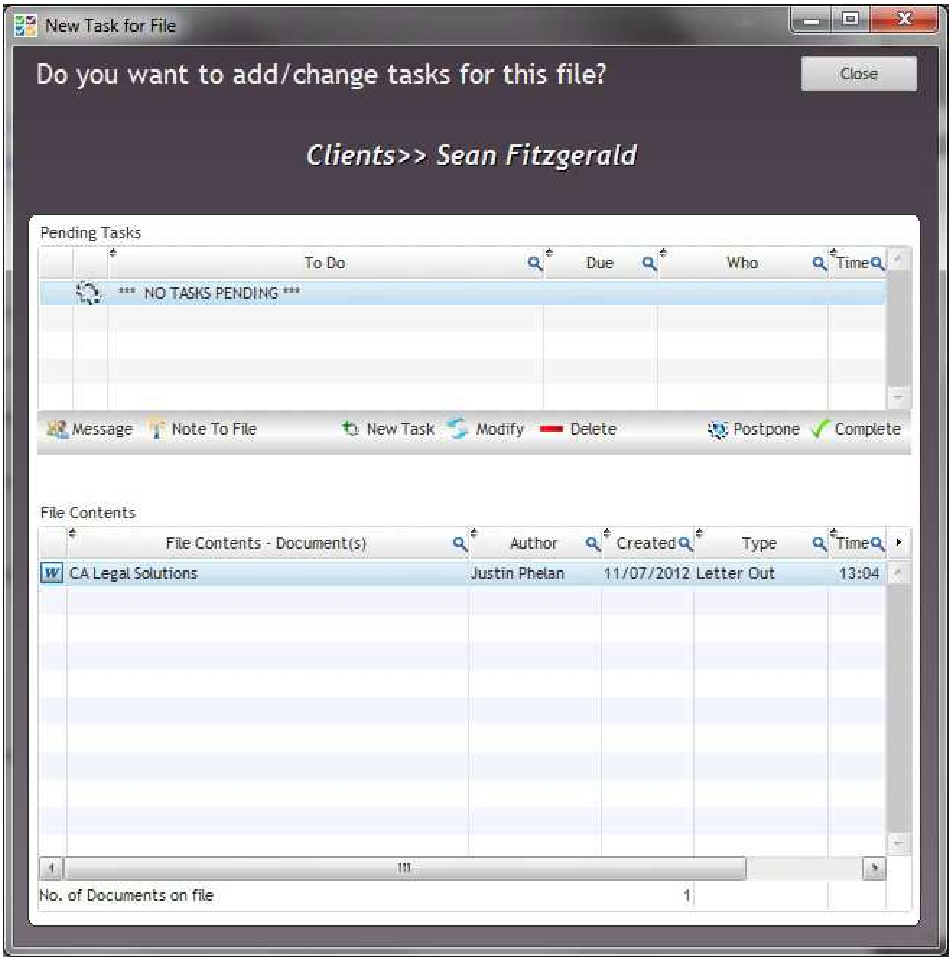
When you've found the File you want to import this document to, click on it and press the *Select* button. You now have to enter a few more details for the document…



Enter/Select the author and choose a Document Category from the Lookup List. Press OK to save.

IMPORTING DOCUMENTS (Continued….)

Congratulations! You've now set up Cabinets, Files and imported a document. That's what DocTopia is all about. You'll be shown the result….

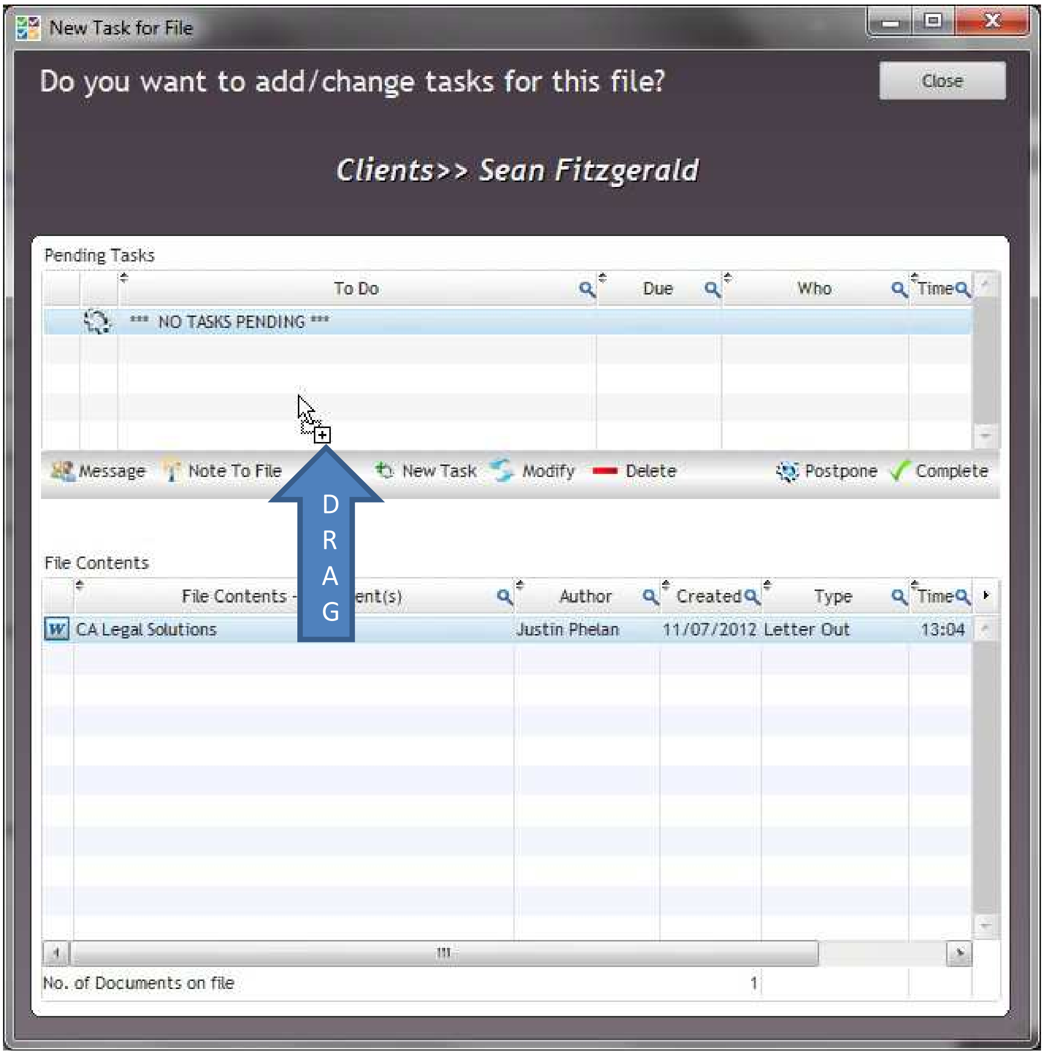


Frequently, when you file something to DocTopia, you need to follow it up in some way or it triggers a process or action on the file. This window gives you the opportunity both to review the file after your import, and to create a task in the Pending Section from the document you imported.

Let's do that…

IMPORTING DOCUMENTS (Continued….)

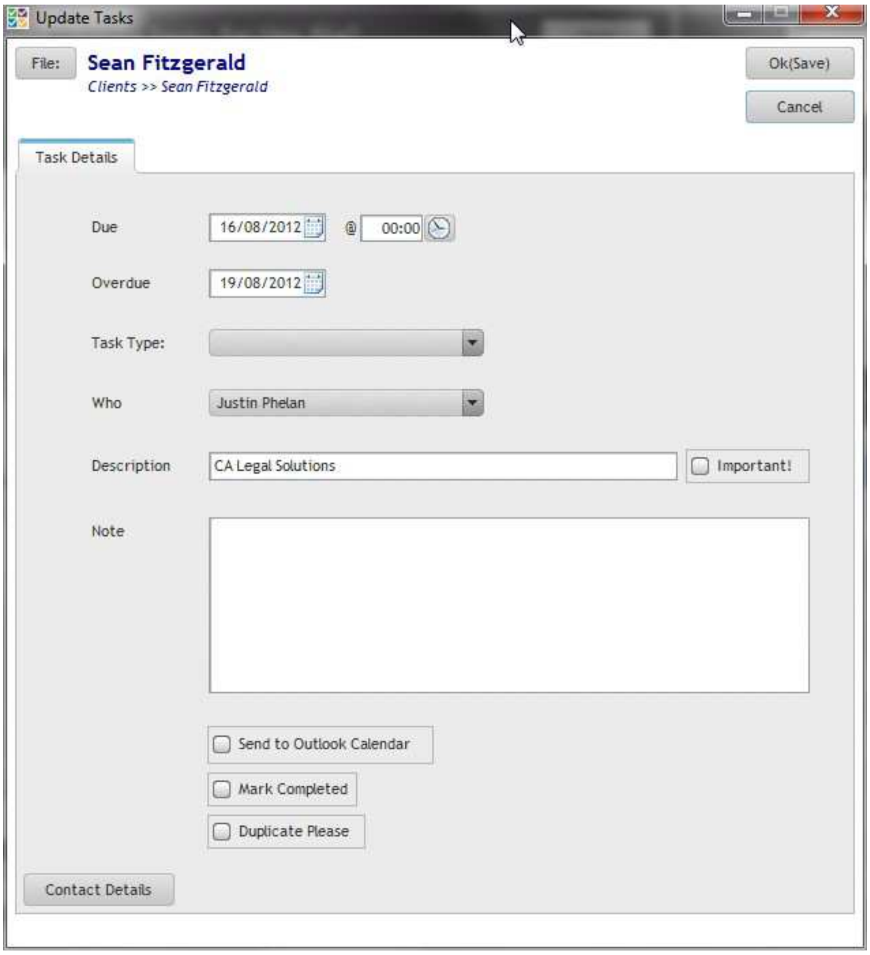
To create a task from a document in a file, simply drag that document with the mouse (hold down left-click on it and move the mouse up) to the Pending Section above:



And Drop it in the Pending Tasks section.

This will cause a new window to open, initially asking you to select a date for the new Task. Then the standard Task form opens for you to fill in the Task Details as shown on the next page…..

IMPORTING DOCUMENTS (Continued….)



This form already knows what File you want to create the new Task for and shows the File name at the top.

You can set the date and time (if required) the task is due to be completed and when it should be flagged as overdue. The *Task Type* is selected from the drop-down list as is the person responsible for the task *(Who).* This will initially default to yourself.

Type in a short *Description* of the Task and tick if this is *Important*. An important task will have a red exclamation mark (!) beside it to let you know.

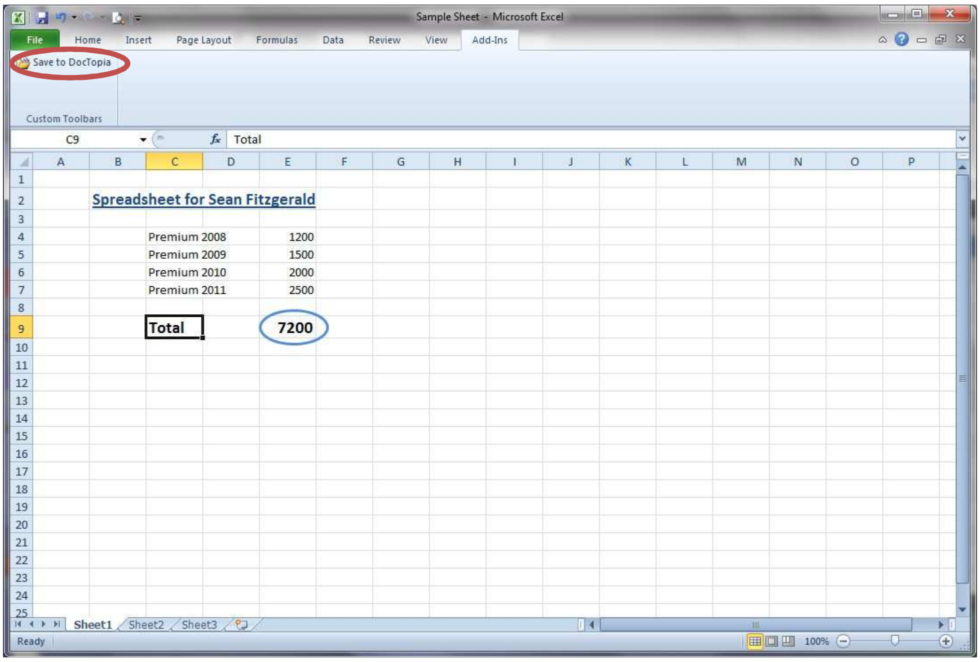
Enter any further details you wish and tick what you want at the bottom.

Send to Outlook – *This will open up an Outlook Appointment for this task for you to complete.*
Mark Completed – *If you are entering Task details after the event, you can mark it as completed.*
Duplicate Please – *Sometimes you may want to create another copy of the task for another user's To-Do list. Tick this box and follow the instructions on update to do this.*

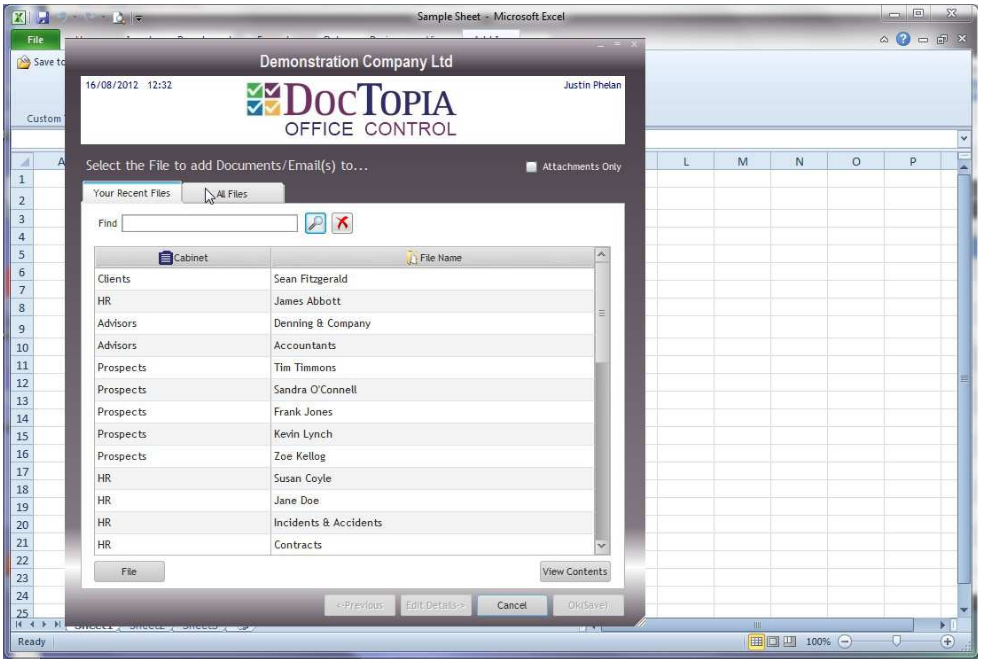
When you have completed the form, press the *OK* button to save it. Your Task will now be shown in the Pending section for the file. Close the New Task window. Your import is complete. Of course, it is far quicker if you are not creating a new Task.

There are other – easier – ways to import Word Documents, Spreadsheets and Emails into DocTopia.

IMPORTING A SPREADSHEET DIRECTLY FROM MICROSOFT EXCEL OR WORD



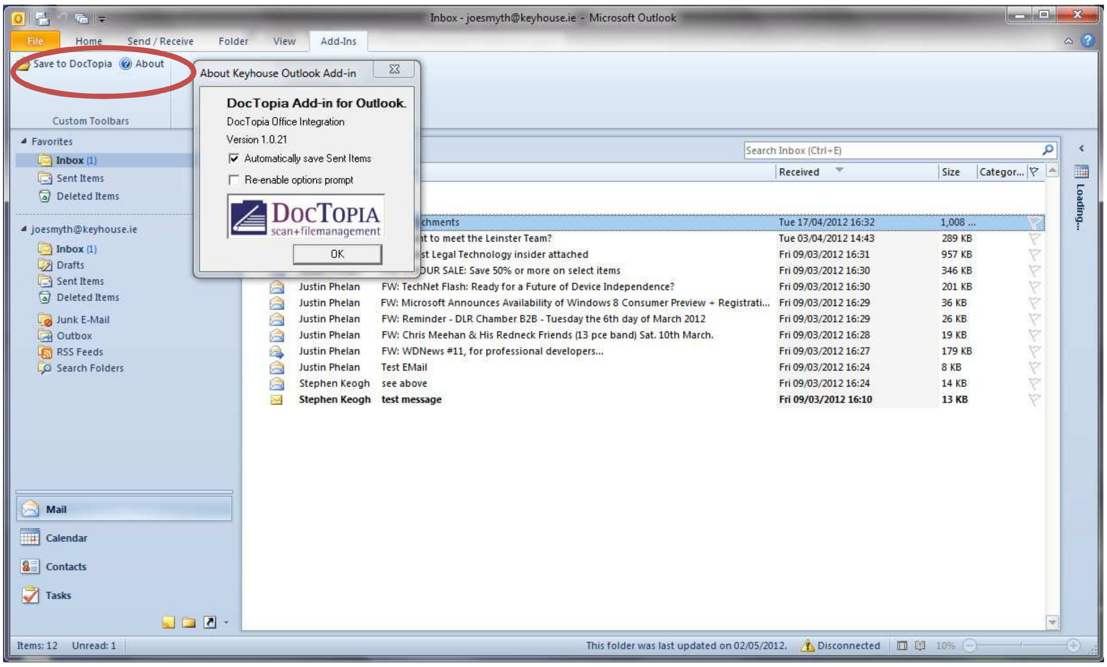
In Excel/Word, there is a "Save to DocTopia" button on the "Add-ins" tab. (In earlier versions, there will be a "Save to DocTopia" button on the toolbar). Simply press this button, answer the question about saving to disk, and the DocTopia File Selection window pops up like this:



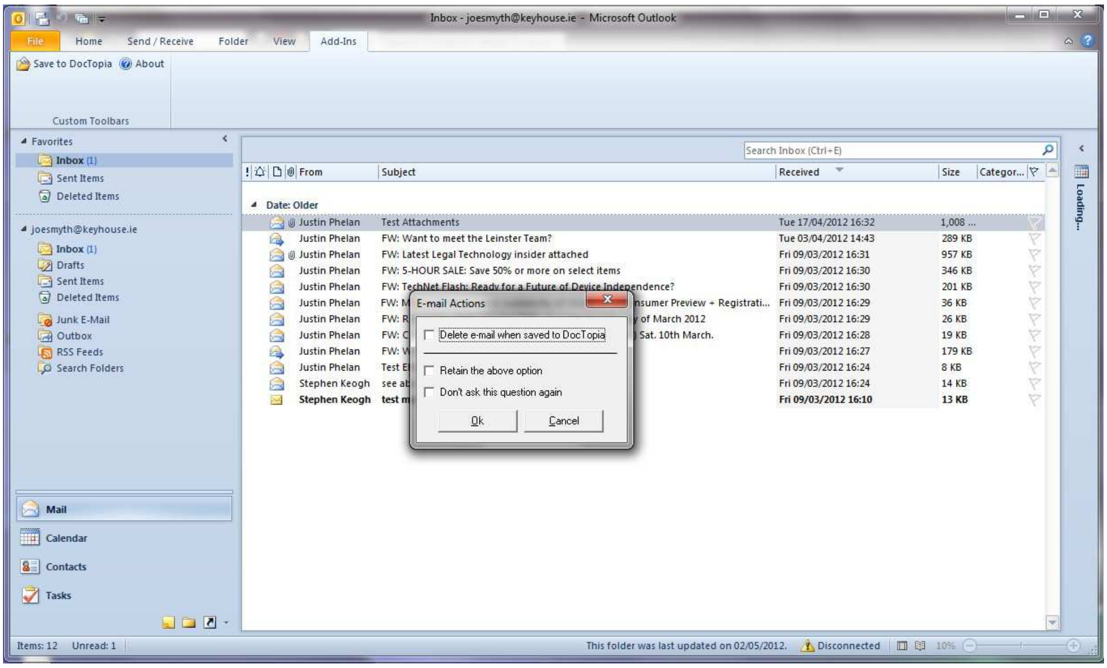
Simply select the file you want to save this spreadsheet/document to – either from the Recent Files list or the All Files list. To quickly save using the Spreadsheet/Documents's name and today's date & time, double-click on your selection or press the File button. To change some of those details before saving, click the *Edit Details* button and complete the form as necessary. You will then get the same opportunity to review the file and add a task as before (See IMPORTING above).

Importing from Outlook is very similar….

IMPORTING FROM OUTLOOK



In Outlook, as well as the "Save to DocTopia" button you also have an "About" button. Pressing this button gives you access to some useful settings. You can set DocTopia to automatically pop-up every time you send an email – very useful. You can also enable an "Actions" prompt to appear every time you save….



In General, it is recommended that you leave this as is. Otherwise, you should by now be able to save your emails in the same way you're used to. There is one extra option with emails – DocTopia recognises if the sender of an email is already associated with any files in DocTopia. If so, it will give you a list of these to choose from, as well as the Recent Files and All Files options you're used to.

MOVING AND COPYING FILES AND DOCUMENTS

Files

Sometimes, you may wish to move a File from one Cabinet (or File) to another. To do so, simply *Right-Click* on the File, select *Move* from the Menu. You will be asked where you want this file moved to. Simply select the Cabinet or File you require and press the *Move* button.

The File, and all its sub-files and Contents will be moved to the Cabinet or File you have chosen.

Documents

You may also move Documents between Files. The procedure is the same as moving files. Simply *Right-Click* on the Document you want to move and select the *Move Document* option. Select the File you want to move the Document to and press the *Move* button.

To make a **Copy** of a document to another file, the procedure is very similar. Choose the *Copy Document* option on the *File Contents Menu*, and proceed as with the *Move* option.

You should note that when you make a copy of a document, the document is not copied on the database. Simply, both files involved point to the same document. This means that if you change anything in the document (see below), the changes will be reflected in all files in which this document is included.

EDITING DOCUMENTS

Certain filed document (Word or Excel Documents) may be edited. To do this, you must first *Check Out* the document. This will prevent anyone else editing the document while you are doing so, thus preserving the integrity of all the changes made. When you are finished editing the Document, simply use the *Check In* option to return it incorporating your changes.

DocTopia retains all versions of a Document, allowing you to see all changes and also allowing you to roll back to a previous version.

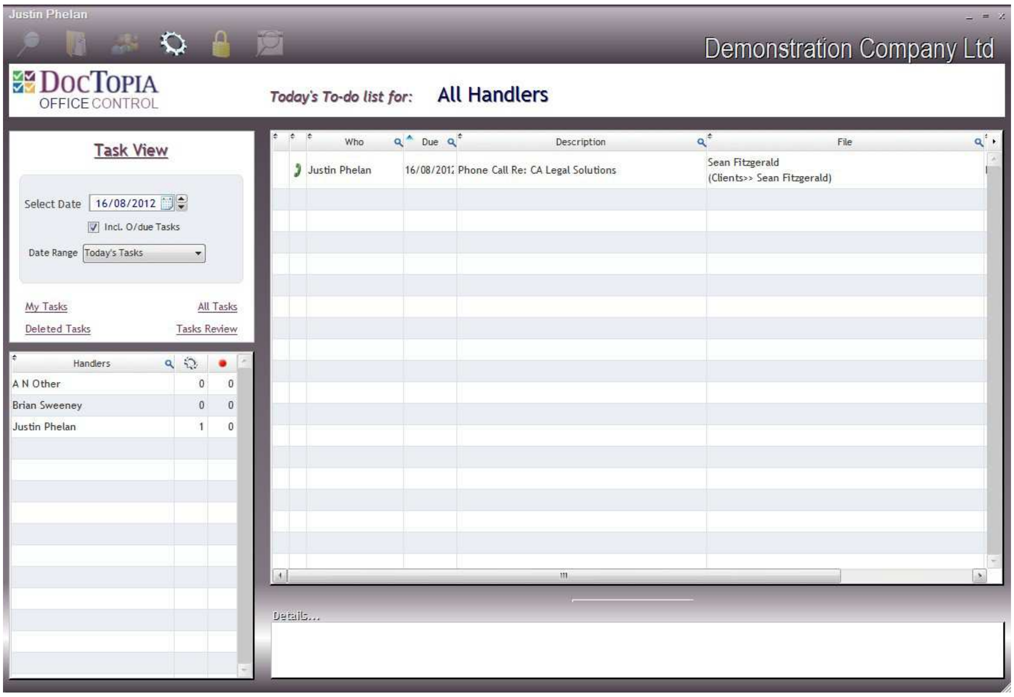
HIGHLIGHTS AND “STICKY” DOCUMENTS

Often, in a file, there may be dozens or hundreds of documents, but only a few are really important. Instead of trawling through all the documents to find the important ones, simply flag them as Highlight Documents (*Right-Click* and *Document Properties*). You can then view only the Highlighted Documents. This can save a lot of time!

Sometimes, with a physical file, you might staple a sheet to the front of the file or have some details on the file cover. You can achieve something similar by making a document “sticky” (*Right-Click* and *Document Properties*). A sticky document will always appear at the top of the list, with a feint yellow background. Use this to keep a frequently referred to document always easily accessible.

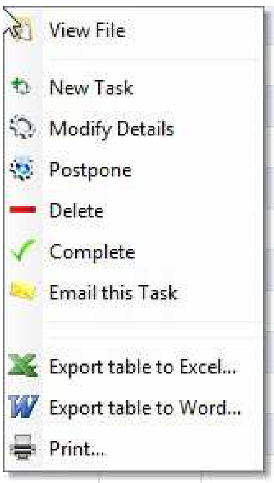
MORE ON TASKS AND TO-DO LISTS

In the DocTopia toolbar, click on the Tasks button to reveal the Tasks View:



This shows To-Dos for everyone on DocTopia. You can also show Tasks just for yourself (by clicking on *My Tasks* in the **Task View** box. Or, you can select a handler from the Handlers list. There are also various views to see – check out the options from the *Date Range* list.

There is a right-click menu for the Task List:



You can View the File for this Task.

You can create new Tasks or change existing tasks.

If you want to postpone a Task, you must use the *Postpone* option. This allows DocTopia to keep track of Tasks.

If you Delete a Task, DocTopia keeps track of that too.

We will be dealing with Completing a Task on the next page.

You can also Email Task Details to the handler.

COMPLETING A TASK

You can Complete a Task either from the Files View, Pending Section or from the Tasks View. The Complete Tasks form looks like this:

You can set the Date and Time of completion and write a note regarding the Task. Press *Ok* to update. You will be given the opportunity to add a new task in the same way as when you import a document.

When a Task has been completed, it moves to the File Contents section and becomes a permanent part of the record for its File.

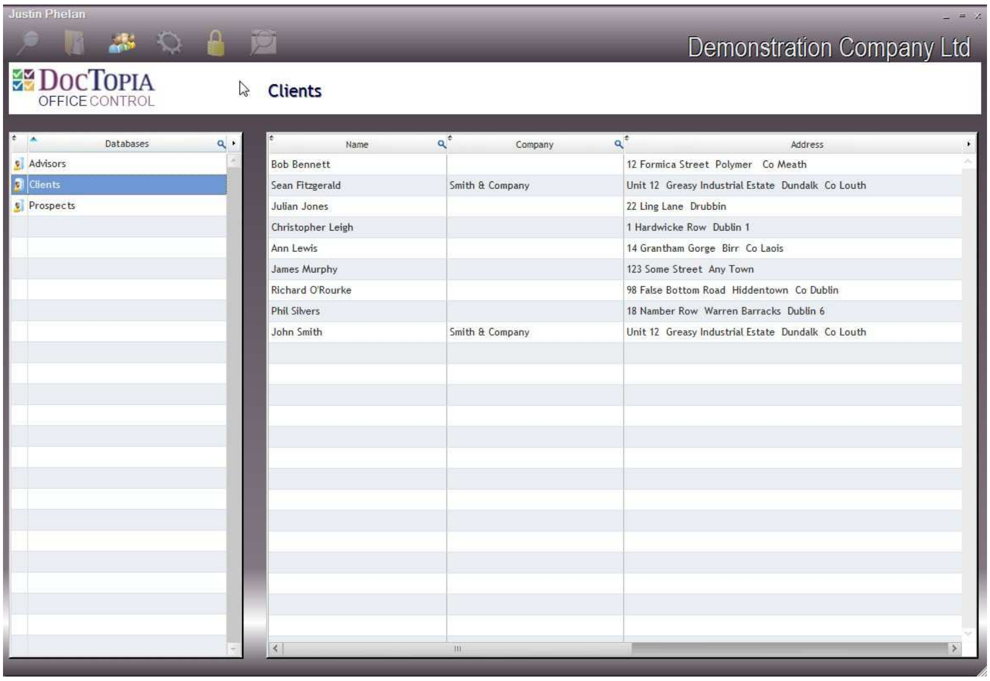
Checklists

You may recall that, when you set up a Task Type, you can create a Checklist for that Type. If the Task you're Completing has a Checklist, it will be shown and you will have to confirm that you have completed all the mandatory items.

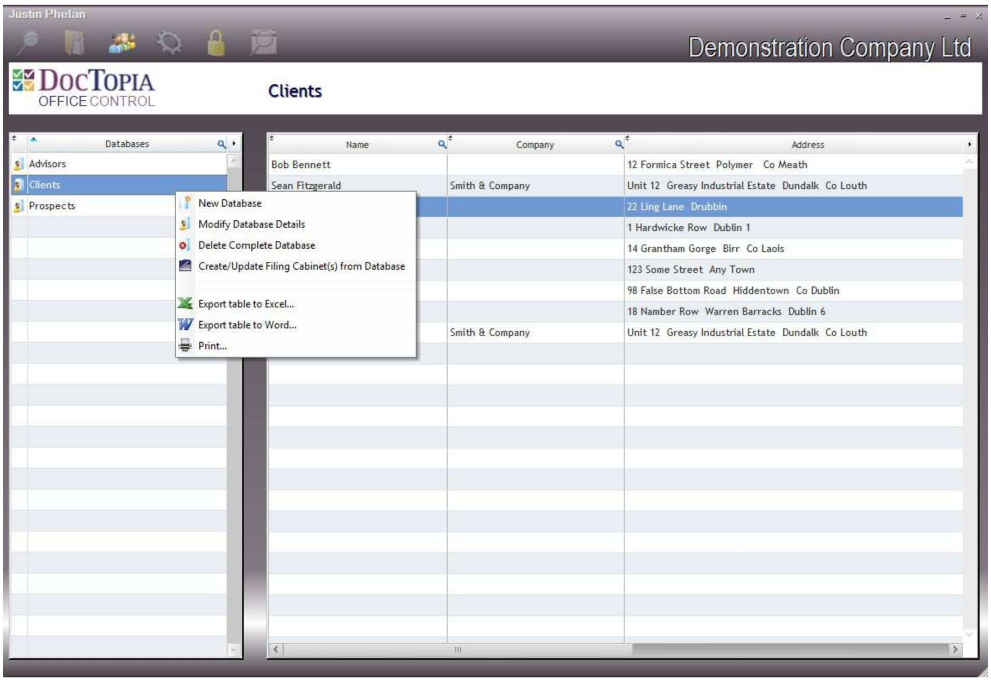
MANAGING CONTACTS

To go to the Contacts View, press the *Contacts* button on the toolbar.

This will reveal the Contacts View:

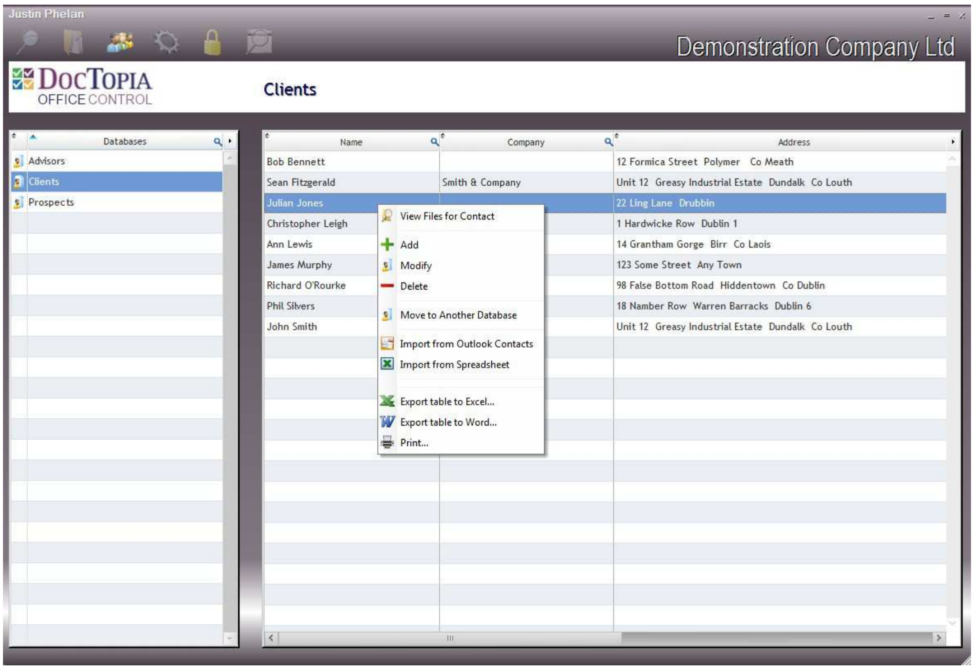


This shows a list of Databases on the left (you can have as many as you like) and the Contacts in the selected Database in the panel on the right. Each panel has its own right-click menu:



and….

MANAGING CONTACTS (continued….)



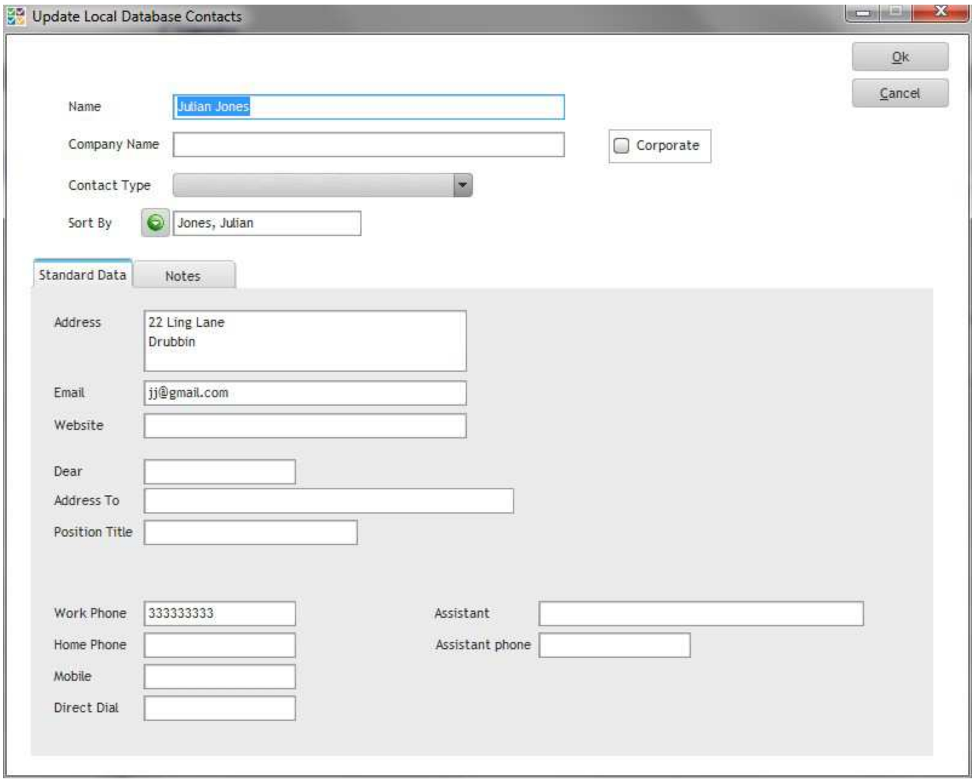
<u>To Add a New Database</u>

Right-Click on the Databases List and select "New Database". Give the Database a Name and keep pressing the *Next* button until the *Ok* button is available. Press *Ok* to save.

The options that you skip by pressing *Next* are to do with either connecting to External Databases and creating User Defined Data Fields. In both these cases, you need to have a very good idea of what you're doing.

Next, we can add a Contact to a Database…..

ADDING A CONTACT TO A DATABASE



Enter the Contact's full name into the *Name* box.

If the Contact is associated with a Company or Organisation, enter the Company/Organisation Name and check the *Corporate* checkbox.

Choose a *Contact Type* from the list of options.

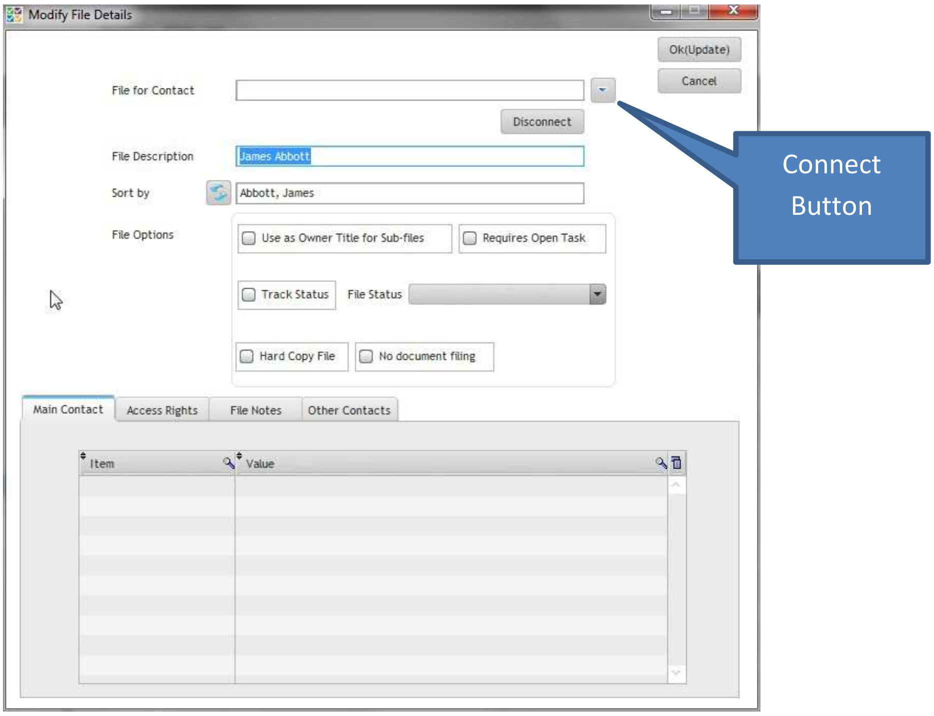
Sort By will default to a *Company/Organisation* Name if the *Corporate* checkbox is ticked, otherwise, it will default to the Surname, First name of the Contact. If you want to switch the Last Name of the *Sort By* to being first, press the button alongside. (Try it and see the effect. You can always reset it).

Thereafter, the data you may enter should be obvious to you. Carry on entering what you have. Don't forget to enter any relevant notes on the *Notes* Tab.

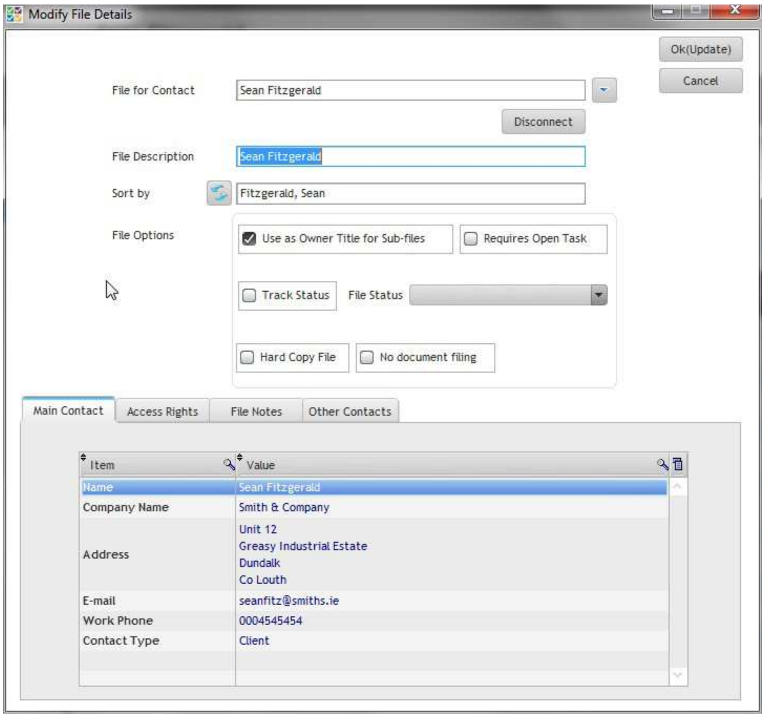
Now we need to associate a Contact with a File in your *Files View*.

ASSOCIATING A CONTACT WITH A FILE

Open the *File View*. Select the File you want to associate a Contact with, right-click and select *File Details*. This opens the File Form:



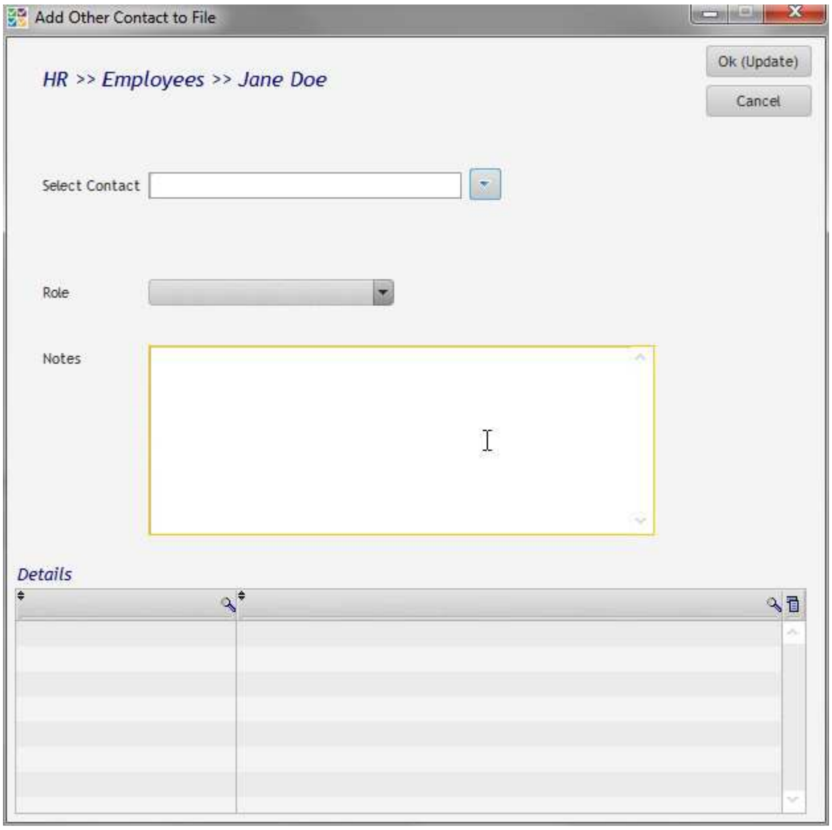
Press the *Connect Button* to open a window for Selecting Contacts. Choose the Database/Conatact you wish to associate and press the *Select Button*. This will connect the Contact to this file as below:



CONNECTING "OTHER" CONTACTS TO FILES

Sometimes, although a File already has a Contact associated with it, you may also want to associate more Contacts relevant to that File. This might happen if you wanted to show the Contact's Solicitor, Accountant or Financial Advisor for example, or Next of Kin for an Employee File.

To connect "Other" Contacts to a File, select the *Other Contacts* Tab and press the *Plus (+) button*. This will open this window….



Select the desired Contact in the same way as outlined above. Specify the Role this Contact plays in relation to this File (select from the list). Add any notes you wish.

The Contact's details are shown in the lower panel for verification.

VIEWING FILES FOR A CONTACT

A Contact on your Databases may thus be associated with several different Files – and in different ways – as the Main Contact or as an "Other" Contact. To view all Files for a Contact, right-click on their entry in the Database and select *View Files*.

WELL DONE AND THANK YOU!

That's the end of the Getting Started Manual. Well done for getting here. You have now covered most of the facilities of DocTopia. If you can repeat what you've learned here, you'll be using the system very well. There are a small few areas we haven't covered here. Why don't you try them out and see what happens. Don't press any *Ok* or similar buttons if you're unsure what the effect will be, although most of the time, you won't do any damage unless you are saving Documents. Documents may not be deleted.

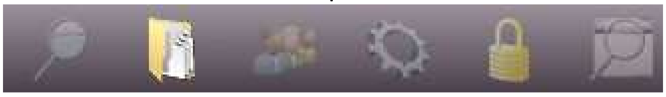
USEFUL TIP

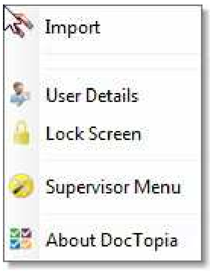
As Documents cannot be deleted once they are saved, create a Filing Cabinet called "zzTrash" or "zzBin" (prefixing the Cabinet with zz ensures it will come at the bottom of the list of Cabinets). Create a File in the Cabinet called "Documents for Destruction". You can move any documents you wish to remove into this file. Then, when you are doing archiving (not yet available) in the future, you can archive and destroy these documents.

There is a summary page next that you can print out or copy for your reference.

DOCTOPIA SUMMARY

Doctopia is divided into 4 Main Views – Search, File, Contacts, Task. Access these via the first 4 buttons on the main DocTopia Toolbar:



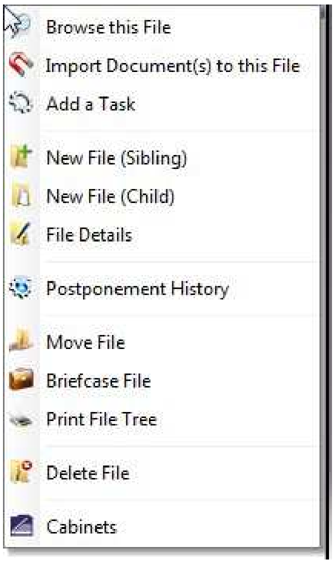


Right-Click for options on any item. Right-click on the window background to bring up the system menu.

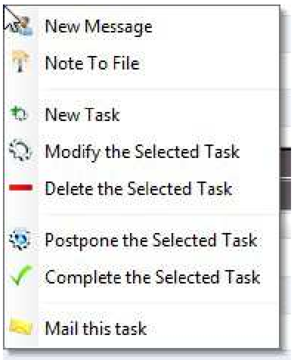
The Supervisor Option will only appear if you are a Supervisor!

NB: If you lock the screen, you must enter your DocTopia password to re-open it.

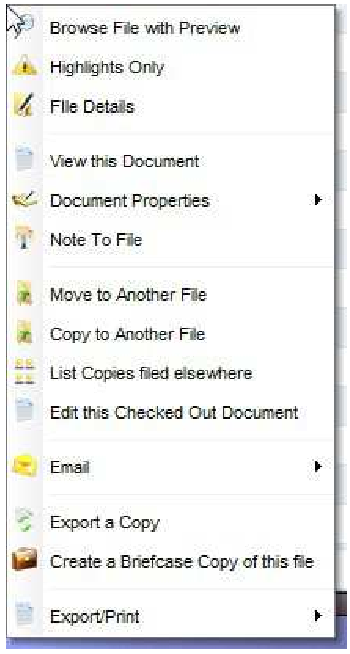
Files Menu



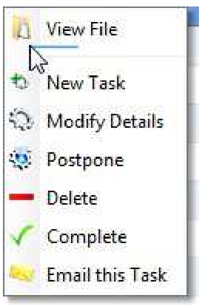
Pending Tasks Menu



File Contents Menu



Tasks Menu



Contacts Menu