



DocSort User Guide

Version 1.0

Copyright © 2016 Kanectacorp. All Rights reserved.

TABLE OF CONTENTS

1. Introduction	3
2. Scope.....	3
3. Prerequisites	3
4. User Login	4
5. Toolbar	5
6. Process Overview	5
6.1 Workspace Setup	6
6.1.1 Sorting Documents.....	7
6.1.2 Importing Keywords using MS-Excel.....	8
6.1.3 Assigning Cabinets	10
6.2 Cabinet View	10
6.2.1 Viewing All Cabinets.....	10
6.2.2 Creating a New Cabinet	11
6.2.3 Opening a Cabinet.....	11
6.2.4 Navigating Folders.....	12
6.2.5 Opening a Document	13
6.3 Reports.....	14
6.3.1 Viewing All Documents Report	14
6.3.2 Viewing Summary by Folder Report	16
6.3.3 Viewing Document Status Report.....	16
6.3.4 Viewing Summary by Status Report.....	17
7. Change Password	18

1. Introduction

This document contains information on various functions of DocSort. It provides detailed, step-by-step instruction on how to use this application.

2. Scope

Docsort is a simple document management solution to organize documents of any format. It helps you to sort any number of documents into a defined folder structure. This structure is based on common keywords found in the documents. These keywords could be a name of a person, company, school, place, month, day, title etc.

3. Prerequisites

You need the following to get started:


- Installation file for DocSort Software
- Valid License key
- User name and password

Note: Please contact your administrator or Docsort support, if you face any issue with the license key activation.

4. User Login

After you've completed installation, you need to log in the application with a valid user name and password.

To log in:

1. Click the Shortcut  on your desktop to open the application.

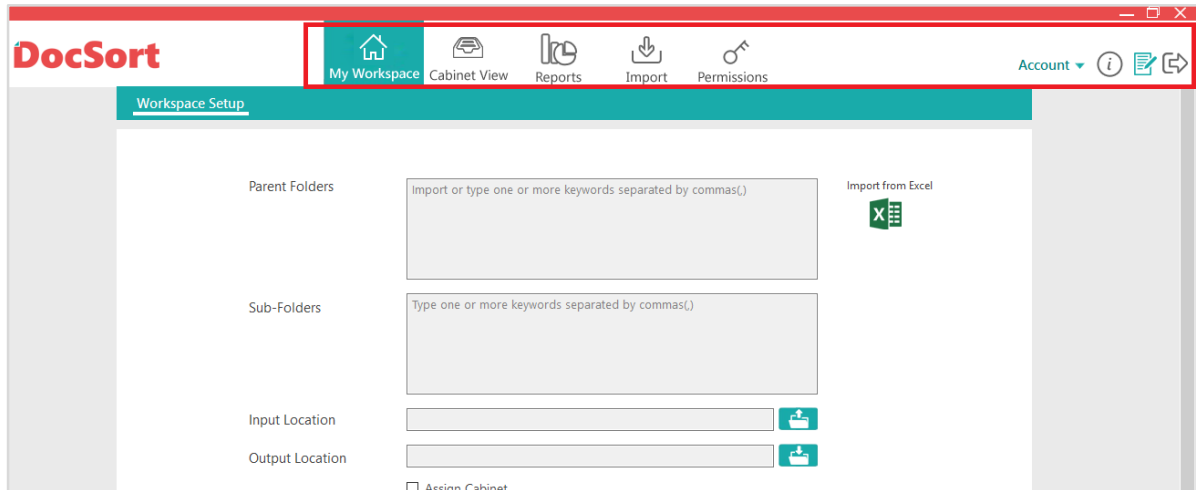


2. Type user name and password provided to you by the Docsort team, then click Log in.
3. If the authentication is successful, application will display the main screen.

Note: For the first time you log in, the application displays a Product activation screen. You need to enter a license key provided to you in an email from DocSort Support.

5. Toolbar

The toolbar is located at the topmost part of the application. It enables you to reach most features easily. The toolbar is highlighted in a red box in the screen below.



You can quickly move around some of the important areas using this toolbar. For example:

- My Workspace
- Cabinet View
- Reports
- Account

6. Process Overview

DocSort has three important workflows in the application:

- My Workspace – To create a desired folder structure and sort documents.
- Cabinet View – To view folder structure and files.
- Reports – To view various statistics on folders and documents.

6.1 Workspace Setup

Once you've logged in the application, the Workspace setup is launched automatically.

Given below is the screen for Workspace Setup.

Workspace Setup

Parent Folders

Import or type one or more keywords separated by commas(,)

Import from Excel

Sub-Folders

Type one or more keywords separated by commas(,)

Input Location

Output Location

☐ Assign Cabinet

☒ Create folder for Unmatched files

Start

Let's first define the input fields in the above screen.

Fields	Definition
Parent Folders	<p>A field to enter keywords that are found in the documents. The application will create folder for each keyword found in this field. You can either type or import the list of keywords from an excel sheet.</p> <p>For example, type a name of an Individual like Bruce Wayne, Sara Gates etc. Application will search all the documents for keyword Bruce Wayne. Any document containing this keyword will be placed inside its matching folder.</p>
Sub-Folders	<p>A field to enter keywords that are found in the documents. The application will create a subfolder for each keyword found in this field. For example, type a word invoice. The Application will search all documents for this keyword. Any document containing this keyword will be placed inside its matching sub-folder.</p> <p>If any document containing Bruce Wayne and Invoice are found, then the application will create a parent folder Bruce Wayne and sub folder invoice.</p>


Input Location	Folder where all the unsorted documents are originally present.
Output Location	Folder where you would like to place the final set of sorted documents.
Assign Cabinet	To organize folder structure under a logical unit, check the Assign Cabinet.
Create Folder for Mismatched files	Creates a Folder named Mismatched when documents do not meet the criteria.

6.1.1 Sorting Documents

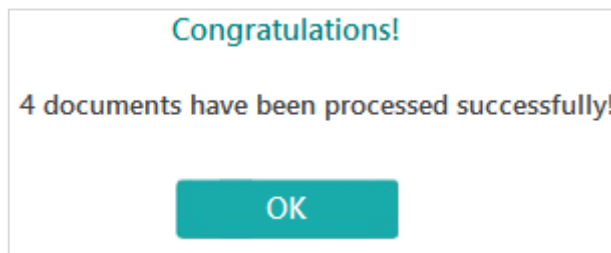
The most important function of DocSort is to organize documents in a user defined folder structure.

To sort Documents:

1. Click on **My Workspace** in the toolbar.
2. Enter information as shown:

3. In the first two fields, you can type and separate keywords using a comma.
4. For input and output location fields, click on  and browse to select a desired location.
5. Click on **Start** Button.

6. Please wait until you get a message from the application. This process may take few minutes to hours depending on the size and number of documents.
7. A success message appears:

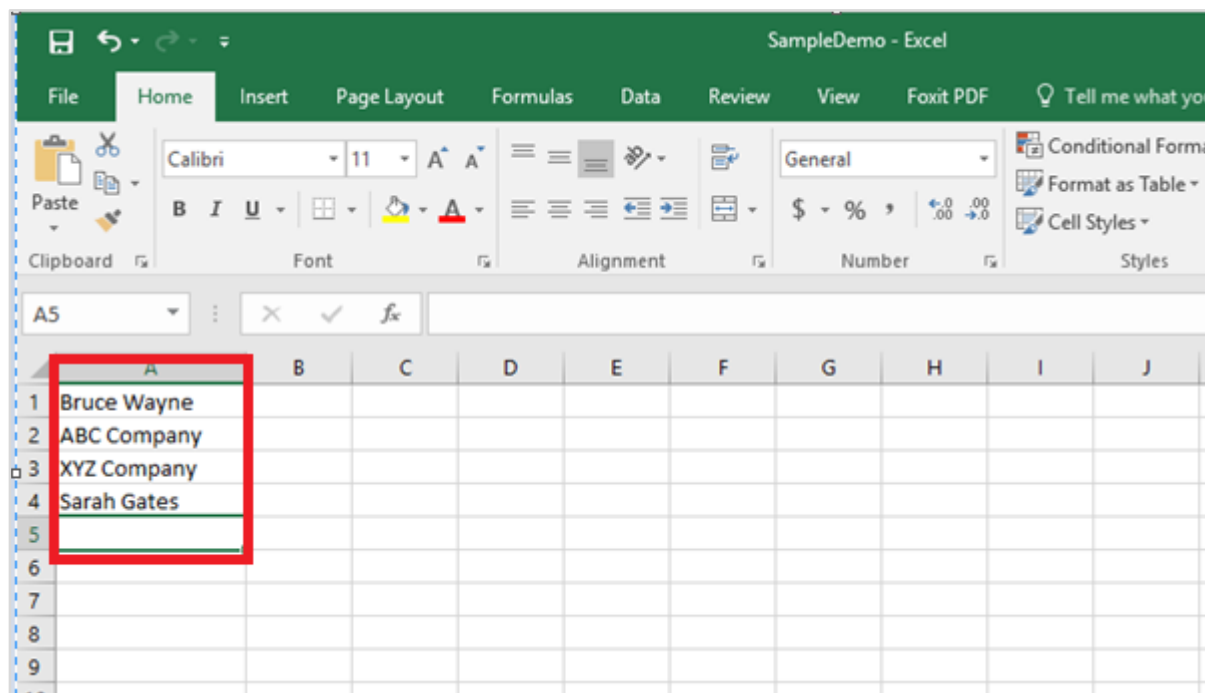


8. Once the process finishes, you may move to other functions of the application using the toolbar.

6.1.2 Importing Keywords using MS-Excel


If you've hundreds of keywords, then it is convenient to define these in an excel sheet.

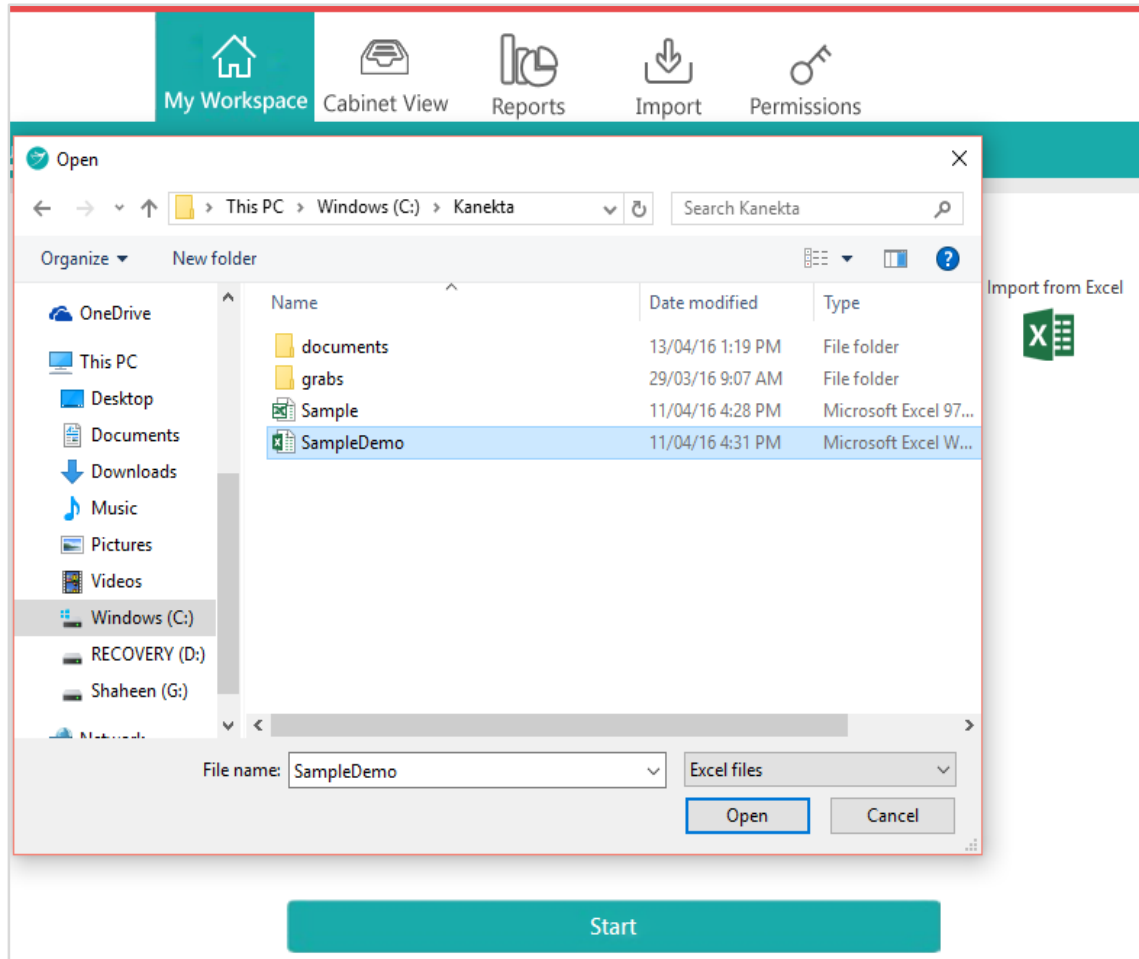
Using Microsoft Excel, place or type all the keywords as shown:




Note: You may also export keywords from a database into an excelsheet. Please contact your administrator for more help.

Once the excel sheet is ready, follow these steps to complete the sorting process:

1. Click on **My Workspace** in the toolbar, Workspace Setup appears.
2. Click on  , a File dialog appears:




3. Browse and open an excelsheet.
4. In the second field, type keywords (separate multiple keywords using a comma).
5. For input and output location fields, click on  and browse to select a desired location on your computer system.
6. Click on **Start** Button.
7. Please wait until you get a message from the application. This process may take few minutes to hours depending on the size and number of documents.
8. A message stating number of documents that have been processed is shown.
9. Once the process finishes, you may move to other functions of the application using the toolbar.

6.1.3 Assigning Cabinets

You can create logical units of documents using Cabinets. Each cabinet is based on a different criteria set by the user. For example, you may want to organize documents into Work, Family and Personal categories. Let's see how simple it is, to assign a Cabinet to documents.

Note: You need to be in the Workspace setup to assign a Cabinet.

To Assign a Cabinet:

1. Click on  **Assign Cabinet**, then click on **create a new Cabinet** link.
2. Type the name of the Cabinet.
3. If you've previously created a cabinet, you can choose it from the drop down list.

6.2 Cabinet View

Cabinet view is a workflow for viewing files and folder structure. Use the toolbar at the topmost part of this application, to open the Cabinet View.



Cabinet View has three links:

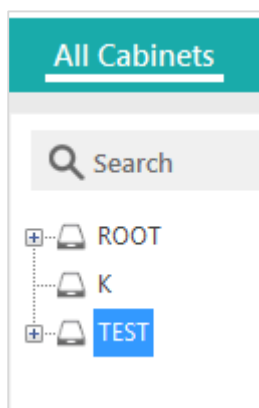



6.2.1 Viewing All Cabinets

To view All Cabinets:

1. Click on **Cabinet View** in the toolbar.
2. Click on **All Cabinets** link.

The screen given below shows three cabinets in our test system:

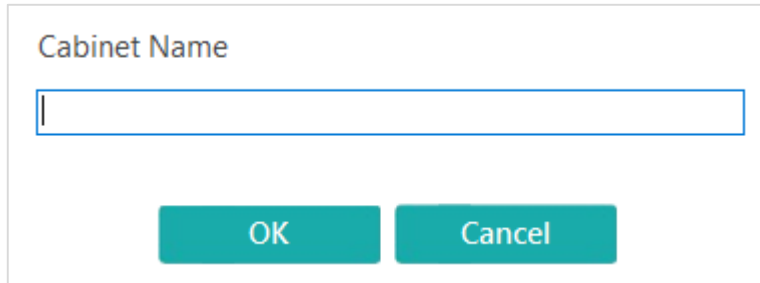


Note: Root is the default cabinet in the application, K and Test are user defined cabinets. Please note, empty Cabinets do not have the  button.

6.2.2 Creating a New Cabinet

To create a New Cabinet:

1. Click on **Cabinet View** in the Toolbar, then click on **New Cabinet** link.

A dialog box titled "Cabinet Name" with a text input field and two buttons: "OK" and "Cancel".

Cabinet Name

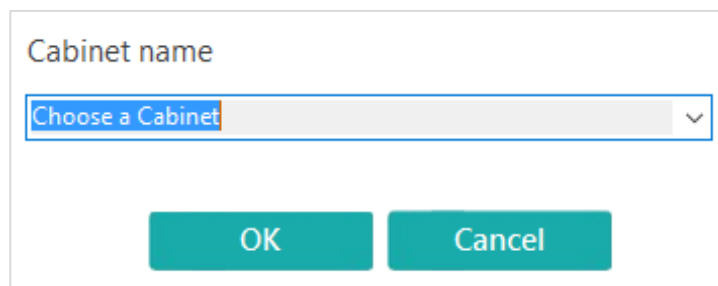
OK Cancel

2. Type a Cabinet Name, then click OK.
3. If a cabinet already exists, a warning stating that the cabinet already exists in the system is shown.

6.2.3 Opening a Cabinet

To open a Cabinet:

1. Click on **Cabinet View** in the Toolbar, then click on **Open Cabinet** link.

A dialog box titled "Cabinet name" with a dropdown menu and two buttons: "OK" and "Cancel".

Cabinet name

Choose a Cabinet



OK Cancel

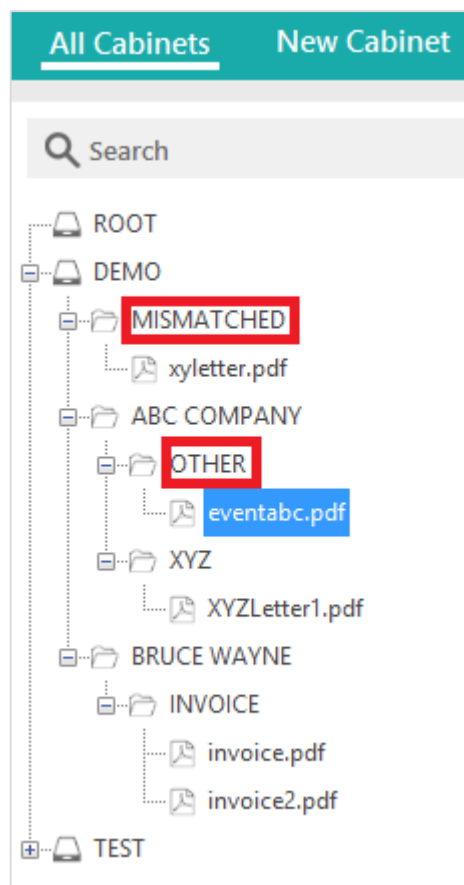
2. Choose a Cabinet Name, then click OK.

6.2.4 Navigating Folders

Once you've completed the sorting process, you may view the resultant folder structure in the application.

To view Folder structure:

1. Click on **Cabinet View** in the Toolbar, then Click on **All Cabinets** link.
2. Click on  to expand each cabinet.
3. The folder structure will be visible in the left hand side pane.
4. Expand the structure till you get . Here's an example:





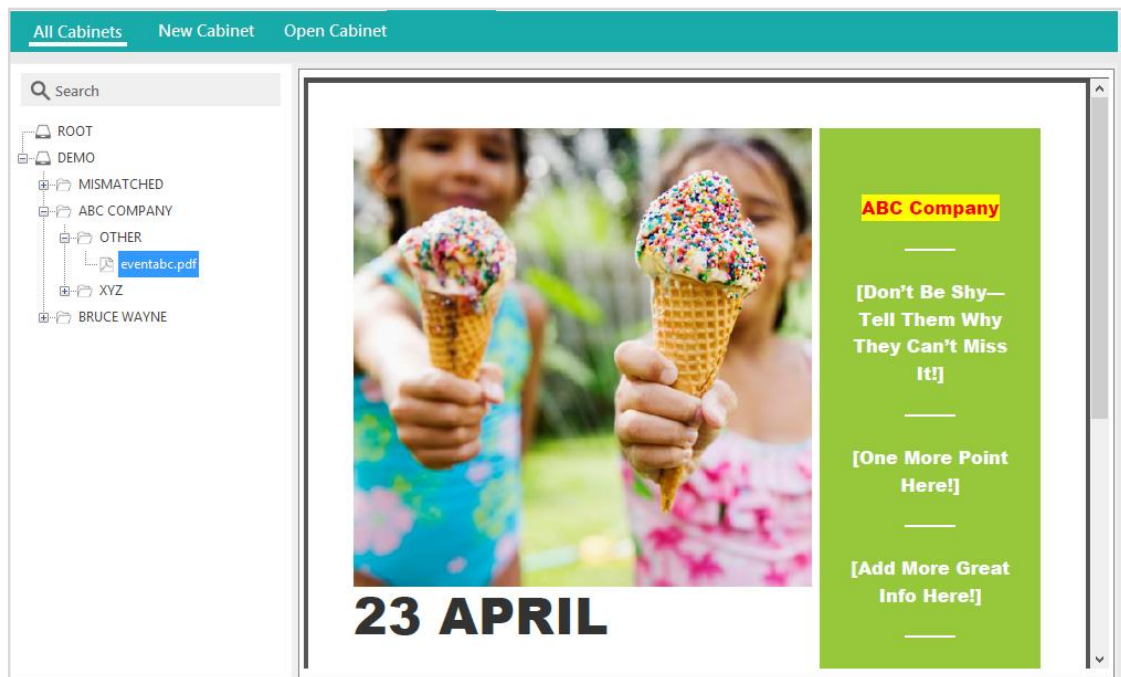
5. A Folder by name **Mismatched** will contain documents that did not meet the criteria for parent folders.
6. A Folder by name **Other** will contain documents that did not meet the criteria for sub folders.

6.2.5 Opening a Document

Once you've completed the sorting process, you may open and view a document in the application.

To view a Document:

1. Click on **Cabinet View** in the Toolbar, then click on **All Cabinets** link.
2. Click on  to expand each cabinet.
3. The folder structure will be visible in the left hand side pane.
4. Expand the structure till you get .
5. If a file name with an extension such as pdf or gif is visible, click on the filename.
6. The selected file will open in the right hand side pane. An example is shown:



7. Scroll through the document to view more.

6.3 Reports

Reporting is an important function of this application. You can view various statistics on folders and documents. Reports can be accessed using the Toolbar at the topmost part of the application. Here's the toolbar:



Following are the links under Reports:



6.3.1 Viewing All Documents Report

The purpose of All Documents Report is:

- To view all Documents that exist in the system
- To find a document by name and view it

To find All Documents:

1. Click on **Reports** in the Toolbar, then click on **All Documents**.
2. A list of all documents appears:

All Documents Summary by Folder Document Status Summary by Status			
<div>Document Name</div> <div>Search</div> <div>Clear</div>			
Document Name	Folder	Date	
xyletter.pdf	Mismatched	11/04/16 4:04:44 PM	
eventabc.pdf	ABC Company	11/04/16 4:04:46 PM	
invoice.pdf	Bruce Wayne	11/04/16 4:04:46 PM	
invoice2.pdf	Bruce Wayne	11/04/16 4:04:46 PM	
XYZLetter1.pdf	ABC Company	11/04/16 4:04:46 PM	

1. Click on **Reports** in the Toolbar, then click on **All Documents**.
2. A list of all documents appears:

3. Type a part of document name or type its full name, then click **Search**.
4. If a document is found, then the document name appears in the list.
5. Click on the document name e.g. invoice.pdf.
6. The selected document opens:

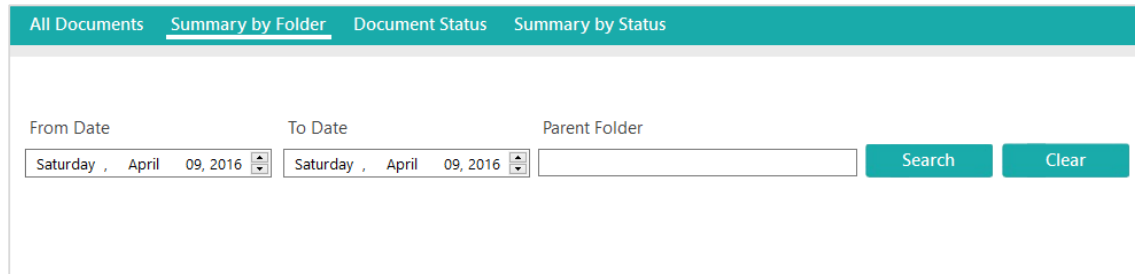
DocSort User Guide

6.3.2 Viewing Summary by Folder Report

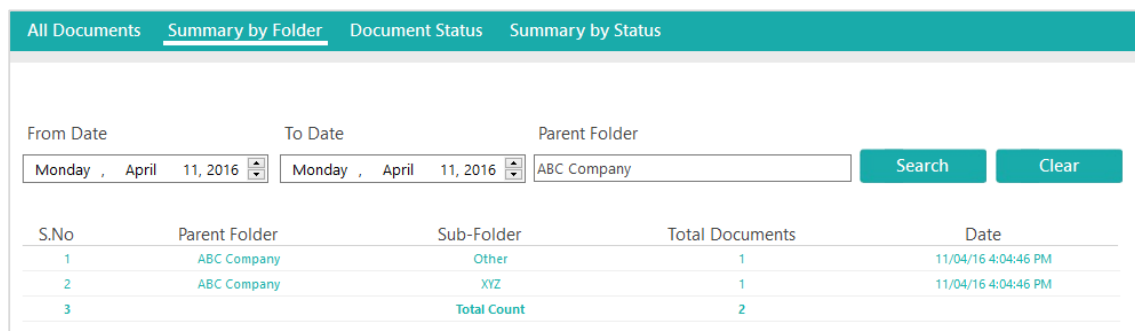
Summary reports are helpful in viewing statistics. In order to view the total number of documents in each folder, use the Summary by Folder Report.

To view Summary by Folder:

1. Click on **Reports** in the Toolbar, then click on **Summary by Folder** link.



2. Choose a **FromDate** and a **ToDate**.
3. Type a Parent folder name, then click **Search**.
4. A summary of total documents in each folder is listed:



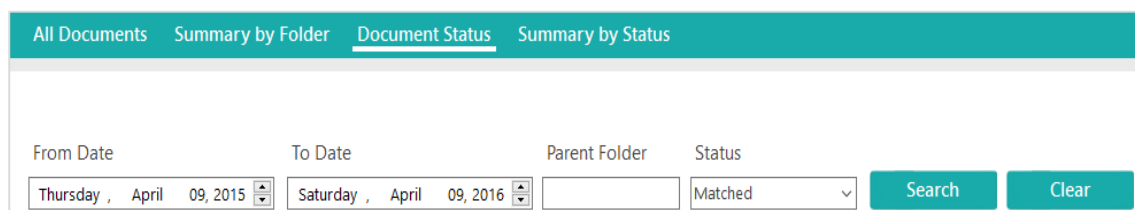
S.No	Parent Folder	Sub-Folder	Total Documents	Date
1	ABC Company	Other	1	11/04/16 4:04:46 PM
2	ABC Company	XYZ	1	11/04/16 4:04:46 PM
3		Total Count	2	

6.3.3 Viewing Document Status Report

You can view documents that matched the criteria or not using the status field in the Document Status report. You can further filter the search based on a parent folder name.

To view Document Status report:

1. Click on **Reports** in the Toolbar, then click on **Document Status** link.



2. Choose a **FromDate** and a **ToDate**.
3. Choose Matched or Mismatched under Status field, then click **Search**.
4. A list of documents appears:

All Documents
Summary by Folder
Document Status
Summary by Status

From Date
To Date
Parent Folder
Status

Monday , April 11, 2016
Monday , April 11, 2016
Matched
Search
Clear

S.No	Parent Folder	Document Name	Status	Date
1	ABC Company	eventabc.pdf	Matched	11/04/16 4:04:46 PM
2	Bruce Wayne	invoice.pdf	Matched	11/04/16 4:04:46 PM
3	Bruce Wayne	invoice2.pdf	Matched	11/04/16 4:04:46 PM
4	ABC Company	XYZLetter1.pdf	Matched	11/04/16 4:04:46 PM

Note: You can also apply an extra filter based on a Parent folder name.

6.3.4 Viewing Summary by Status Report

In order to view summary of Total Matched and Total Mismatched documents, use the Summary by Status Report.

To view Summary by Status Report:

- Click on **Reports** in the Toolbar, then click on **Summary by Status** link.

All Documents
Summary by Folder
Document Status
Summary by Status

From Date
To Date

Monday , April 11, 2016
Monday , April 11, 2016
Search
Clear

- Choose a **FromDate** and a **ToDate**.
- Click on **Search**.
- A summary of total documents appears:

All Documents
Summary by Folder
Document Status
Summary by Status

From Date
To Date

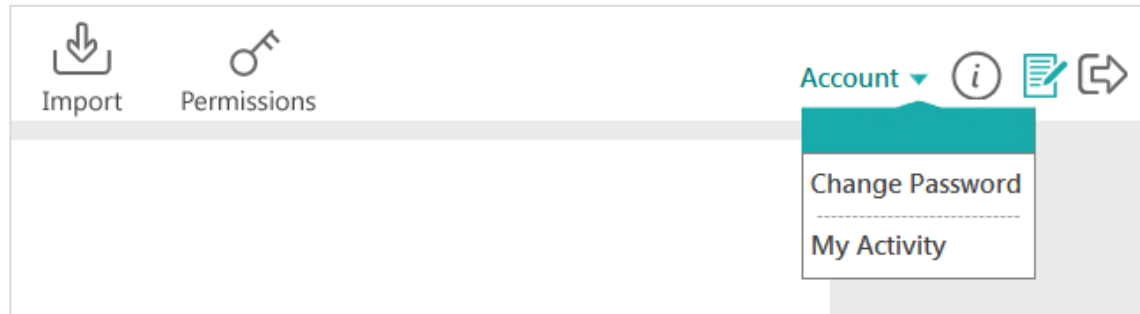
Tuesday , April 19, 2016
Tuesday , April 19, 2016
Search
Clear

S.No	Total Documents	Total Matched Documents	Total Mismatched Documents	Date
1	5	2	3	19/04/16
Total Count	5	2	3	

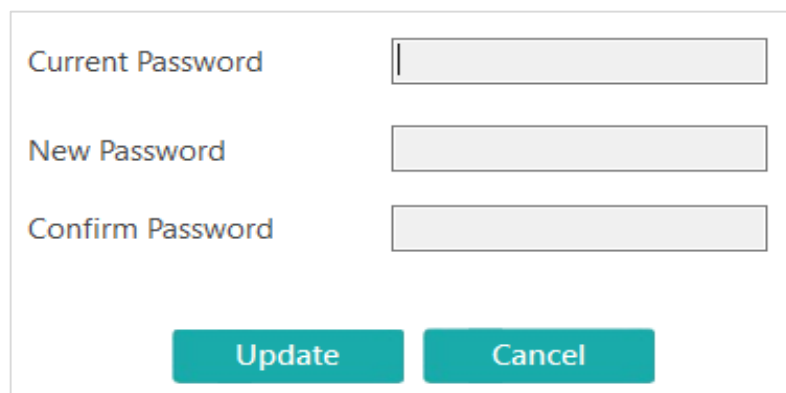
7. Change Password

To change your password:

1. Click on **Account** ▼ in the Toolbar, a drop down menu appears:



2. Click on Change Password.

A screenshot of a 'Change Password' form. It contains three input fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the fields are two buttons: 'Update' (teal) and 'Cancel' (teal).

3. Type your current password and new password.
4. Type and confirm the new password.
5. Click on **Update** button.
6. Wait for application to update the password.
7. A Success message appears.

Note: Make sure the Current password and New password are not the same.